

T.E.A.M. Dynamics

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Communication Skills Program

COURSE #1: *Understanding Your Personality &
Impact on Others*

COURSE #2: *Assessing Client Personality &
Communication Adjustments*

COURSE #3: *Managing Diverse Personalities &
Personality-Based Conflict*

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Overview

The **T.E.A.M. Dynamics Communication Skills Program** is designed to teach participants the importance of understanding their core personalities. Participants will study the impact of core personality in communicating and working with others, and how it comes to play in conflict scenarios.

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Course #1 is the foundation of the follow-up courses that deal in-depth with communication and conflict issues:

- **T.E.A.M. Dynamics II:** Assessing Client Personality and Communication Adjustments
- **T.E.A.M. Dynamics III:** Resolving Diverse Personalities and Personality-Based Conflict.

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Objectives

In this course, participants will achieve the following objectives:

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- **Recognize** the inherent strengths and challenges of their own personality style.
- **Understand** the impact (*both positive and negative*) that their personality has on others.
- **Identify** the root causes of personality-based conflict and adjust accordingly.
- **Recognize** why certain types of individuals cause work-related stress in their lives.
- **Understand** the various personality-based perceptions that lead to miscommunication and misunderstanding with others.
- **Identify** a clear agenda for improving relationships with all personality styles.



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Why T.E.A.M. Dynamics?

The T.E.A.M. Dynamics Course is a unique approach for teaching personality-based communication skills. Although there are many courses available in personality profiling, the T.E.A.M. Dynamics Course stands out because of its emphasis on the chemistry, or dynamic, that is created when your personality interacts with that of a client or co-worker. The T.E.A.M. Dynamics philosophy is designed to help you move from a *"me-centered"* to a *"we-centered"* approach in dealing with clients and colleagues.

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Understanding the inherent strengths and challenges in our own personality makes moving from *"me"* to *"we"* an easier transition. We must gain a clear understanding of how our personality impacts, and is perceived by, others. We must also learn to recognize the type of personality we are attempting to communicate with so that we are not unwittingly arousing negative emotional reactions and shutting down the communication process.

The intention of this course is to enable you to begin communicating at the level of core personality. Many advisers simply communicate at the superficial level of product features and benefits with a one-size-fits-all mentality. This approach creates a weak psychological footing upon which to build client trust. As the following illustrations show, your communication can move from superficial to profound by addressing clients' motives for investing and addressing their core personalities—the foundation from which all their decisions and reactions are based.

An awareness of our own personality's impact and a greater concern for the comfort level of our clients is the basis for success in communication. By meeting these two objectives, you will minimize miscommunication, misunderstanding and negative interactions with clients, which will serve as a basis for strengthened trust and improved relationships. This course has proven to be a foundational communication skill for managing client expectations, reactions and behaviors.

Moving from *"me"* to *"we"* means putting our clients first—by first understanding each client and ourselves.

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How to Take the Profile (*Sample*)

By filling out the following profile, you will discover your personality style. It is important to remember that there is no right or wrong style.

For each set, choose the word or phrase that best describes you. For best results, do not spend a lot of time on each answer—go with your first instinct.

You may feel a sense of tension at times when you are forced to choose between sets of words or phrase that may describe you. This sense of tension is an integral part of this exercise.

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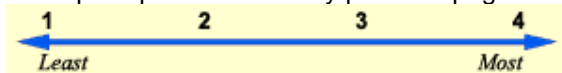
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Personality Awareness Profile

Directions: Place the appropriate number next to each descriptive phrase. You may print this page for reference.



A	<input type="text"/>	<i>True to Friends</i>	A	<input type="text"/>	<i>Understanding</i>
B	<input type="text"/>	<i>Innovator</i>	B	<input type="text"/>	<i>Takes Charge</i>
C	<input type="text"/>	<i>Thinks Things Through</i>	C	<input type="text"/>	<i>Accurate</i>
D	<input type="text"/>	<i>Energetic</i>	D	<input type="text"/>	<i>Achiever</i>
A	<input type="text"/>	<i>Thoughtful of Others</i>	A	<input type="text"/>	<i>Giving</i>
B	<input type="text"/>	<i>Daring</i>	B	<input type="text"/>	<i>Does Own Thing</i>
C	<input type="text"/>	<i>Wants All Information</i>	C	<input type="text"/>	<i>Cautious</i>
D	<input type="text"/>	<i>Laughs Easily/Witty</i>	D	<input type="text"/>	<i>Articulate</i>
A	<input type="text"/>	<i>Will Do as Instructed</i>	A	<input type="text"/>	<i>Humble</i>
B	<input type="text"/>	<i>Risk-Taker</i>	B	<input type="text"/>	<i>Refuses to Give Up</i>
C	<input type="text"/>	<i>Wants Things to Be Exact</i>	C	<input type="text"/>	<i>Likes Routine</i>
D	<input type="text"/>	<i>Persuasive</i>	D	<input type="text"/>	<i>Leads the Pack</i>
A	<input type="text"/>	<i>Listens & Remains Calm</i>	A	<input type="text"/>	<i>Flows with the Crowd</i>
B	<input type="text"/>	<i>Wants to Win</i>	B	<input type="text"/>	<i>Strong Personality</i>
C	<input type="text"/>	<i>Deliberate</i>	C	<input type="text"/>	<i>Dependable</i>
D	<input type="text"/>	<i>Enthusiastic</i>	D	<input type="text"/>	<i>Interesting</i>
A	<input type="text"/>	<i>Hides Feelings</i>	A	<input type="text"/>	<i>Does Not Rock the Boat</i>
B	<input type="text"/>	<i>Courageous</i>	B	<input type="text"/>	<i>Speaks Openly & Boldly</i>
C	<input type="text"/>	<i>Has High Standards</i>	C	<input type="text"/>	<i>Plays by the Rules</i>
D	<input type="text"/>	<i>Likes to Talk</i>	D	<input type="text"/>	<i>Gets Others Involved</i>
A	<input type="text"/>	<i>Friendly to Others</i>	A	<input type="text"/>	<i>Wants Others Involved</i>
B	<input type="text"/>	<i>Decisive</i>	B	<input type="text"/>	<i>Results-Driven</i>
C	<input type="text"/>	<i>Wants Order</i>	C	<input type="text"/>	<i>Difficult Time Deciding</i>
D	<input type="text"/>	<i>Outgoing</i>	D	<input type="text"/>	<i>Optimistic</i>

Sample

A = 3B = 1C = 4D = 2

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Add up totals for each and record in the boxes below.

TOTALS: A = B = C = D =

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Personality Awareness Grid

Directions: **Print this page**, then mark your **A** total on the **T** line, your **B** total on the **E** line, your **C** total on the **A** line, and your **D** total on the **M** line. Draw a line to connect the dots. On the bottom, input the letter or name of your highest total next to the leading role, your second highest total next to the supporting role, and your lowest total next to the villain role.

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Leading Role: Supporting Role: Villain Role:

	Togetherness (A Total)	Enterpriser (B Total)	Analyzer (C Total)	Motivator (D Total)
48				
47				
46				
45				
44				
43				
42				
41				
40				
39				
38				
37				
36				
35				
34				
33				

32				
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12				



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Course #1, Exercise #1

Directions: Match each personality style with its central motivation.

10a

- | | | |
|--------------------------|-----------------|-------------|
| <input type="checkbox"/> | 1. Togetherness | A. Accuracy |
| <input type="checkbox"/> | 2. Enterpriser | B. Feelings |
| <input type="checkbox"/> | 3. Analyzer | C. Results |
| <input type="checkbox"/> | 4. Motivator | D. Energy |

Answers

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The Personality Axis

While there are many features to each personality style—both positive and challenging—each personality has a simple and understandable axis around which it revolves. This personality axis is a good first step toward understanding personality styles. The axis points for the four personality styles are:

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- ***The Togetherness Axis: Feelings***



First and foremost in the mind of the Togetherness Personality is sensitivity. How will others feel? How will this affect them? Did you show me respect and kindness? The higher your number on the "T" line, the more prominent this feature will be in your personality.

- ***The Enterpriser Axis: Results***



Enterprisers are happiest when accomplishing something—achieving results. Enterprisers want to steer their own destinies; they feel frustrated or unhappy when not in control. Individualistic in nature, the Enterpriser lives by the creed, *"If you want to get something done, do it yourself."*

- ***The Analyzer Axis: Accuracy***



Analyzers desire precision and accuracy in all they do. They require a predictable, linear process; they look for compliance. Their desire for accuracy leads to an intense desire for doing things right.

- ***The Motivator Axis: Energy***



Motivators gravitate toward fun and joy. They take a more playful approach to life and have great amounts of energy to burn. They love to be on the go, enjoy action, and like to be around others who exude positive energy as well.

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Definition of Roles

There is a proper and improper way to interpret the personality profiles.

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- **The improper way** to interpret a profile is to look at the highest letter and assume that the personality style comprehensively defines the individual in question. This sort of interpretation, while indicative of a personality tendency, oversimplifies the individual's personality.
- **The proper approach** for interpretation is to look closely at the top letter (*leading role*), the second letter (*supporting role*), and the bottom letter (*the villain role*).

While some people have just one definitive role, most people have two roles. The most common combinations for leading and supporting roles are A-T, E-M, T-M, and E-A.

The more uncommon combinations for leading and supporting roles are E-T, and M-A (*the rarest combination*). More information on the dynamics of these combinations is covered in the sample patterns section.

Common Combinations

A - T E - M

T - M E - A

Uncommon Combinations

E - T M - A

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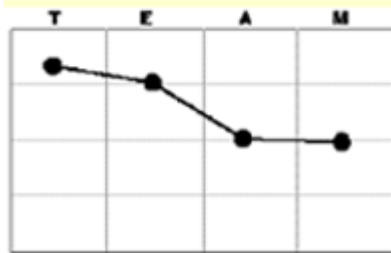
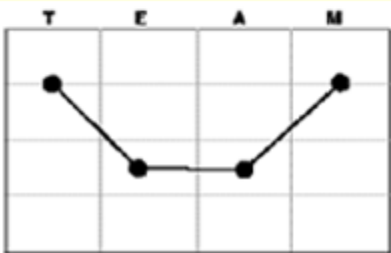
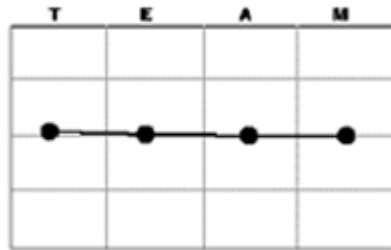
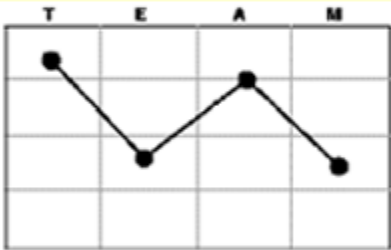
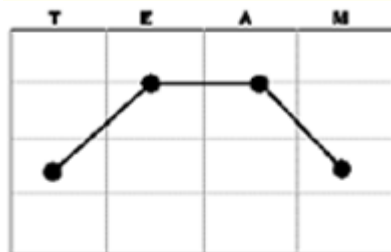
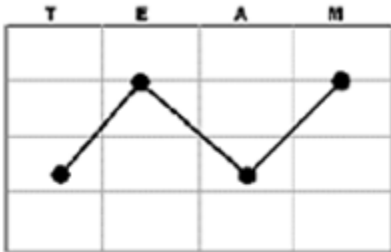
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Sample Personality Patterns

Common Personality Patterns

Uncommon Personality Patterns

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The Leading Role

Your leading role is the most reliable predictor of how you will act and react on a daily basis. Your leading role can also be described as the comfort zone for your personality.

If you are working or fulfilling roles that are congruent with your leading role, there is minimal stress involved. The opposite is also true. If your work requires tasks and playing roles that are not congruent with your leading role, you will feel higher levels of work-related stress.

An example would be the person with a leading role of Analyzer in a position where it was necessary to make snap decisions. Another example would be a leading role of Enterpriser who has to deal with detailed paperwork or slow and bureaucratic processes.



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The Supporting Role

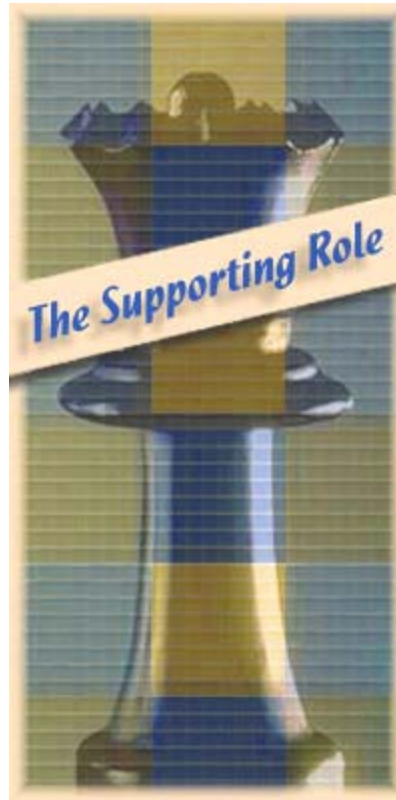
Your supporting role is the complement to your leading role and plays a major part in your responses to stress and pressure.

For example, if your supporting role is Togetherness, you will tend to seek cooperation, sympathy, and help when under pressure. However, if your supporting role is Enterpriser, you will tend to become the rugged individualist under pressure.

With a supporting role of Analyzer, you will grow cautious and methodical; while a supporting role of Motivator may raise your energy level and tendency to coach and persuade others.

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The Villain Role

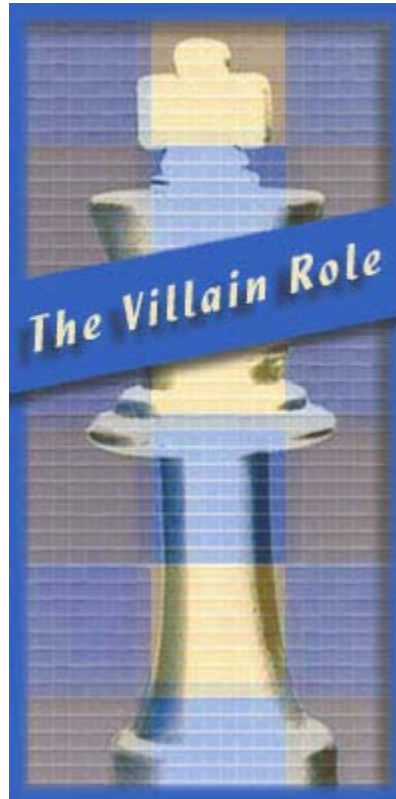
The villain role is the personality style that causes the most stress and tension in your life. Because the level of this role is so low in your personality makeup, communicating and working with a person of your villain role is an unnatural process for you.

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Similarly, just as the individual you are working with fulfills your villain role, you may also be their villain role. This helps to explain why communication and understanding can be such a strained process for two people with opposing villain roles.

For example, if your villain role is Togetherness, you will become easily agitated with people who procrastinate, defend the status quo and respond with oversensitivity. If, on the other hand, your villain role is Enterpriser, you will struggle with people who take charge and speak bluntly.

If your villain role is Analyzer, you will be easily annoyed by individuals who are very cautious, slow down processes and "over-think" every matter that comes their way. Finally, if your villain role is Motivator, you will grow tense around people who are talkative, loud, effervescent and impulsive.



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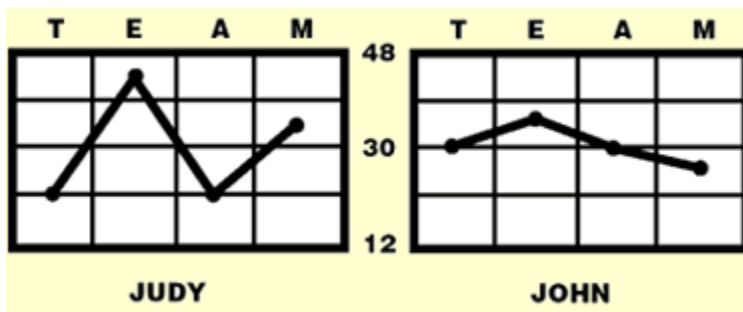
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Predictability: The Significance of Your Numbers

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The predictability of an individual's personality hinges on the *level* of the numbers on the T.E.A.M. Dynamics grid. In our sample, although both participants mapped out as high E's, there would be significant disparities in the predictability of their behavior.



In this case, John (*E-35*) and Judy (*E-44*), each have the leading role of Enterpriser, but there will be profound differences in their work style and behavior because of the *level* of each "E".

John's style would be to take charge only when he feels that is what the other person or the group wants. His leadership would be cooperative and empathetic in nature.

Judy, however, would most likely take charge regardless of what others thought. In Judy, the "E" is a highly pronounced and definitive feature of her personality.

A "30" on any letter is the middle-of-the-road (or equator) for that particular role. Once you score around eight points higher or lower (*38 or more, 22 or less*) on any letter you will fall into predictable behavioral and response patterns.

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Predictability: The Significance of Your Numbers (Continued)

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The T.E.A.M. Dynamics program is designed to help you understand people—not stereotype them. Although there are four basic personality styles, each person is a unique recipe of those four basic ingredients. Each of us has within us all four personality roles, to some degree—whether high or low—and is capable of responding in each role when necessary.

For example, a person with a 16 on the Analyzer line will dislike detail and usually avoid it, but is capable of becoming quite analytical if necessary. When sensitivity is called for, we can shift into the Togetherness side of our personality—no matter how low it may be. When results and action are called for, we can shift into our Enterpriser mode. When caution and careful planning are called for, we can shift into our Analyzer mode. Likewise, when energy and optimism are called for, we can shift into our Motivator mode.



When an individual is high in one or two personality areas, it is a good indicator of what his or her communication style and response to stress or pressure will be.

(NOTE: Personality patterns are not a predictor of a person's values, beliefs or temperament.)

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Your Personality Recipe

A helpful way to understand the balance of your personality is to look at the four personality styles as ingredients, and the sum of these ingredients as the unique recipe that makes up your personality. Although there are only four basic personalities, there is an exponential number of possible combinations.

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It is important to use this course as a means of understanding ourselves and others—not as a means of stereotyping. Regardless of how low we are in one particular personality style, we still have some degree of that style. We can call upon that particular side of our personality in situations that demand such a response. For example, a person who is extremely low in the Analyzer personality could become quite analytical if there were flashing red lights behind him on the highway—or if the IRS came calling.

A unique method for viewing your blended personality is to find the percentage of each of the personality ingredients. To do this, divide the number of each personality style by 120.

Here is an example:

<i>Recipe</i>			
<i>Personality Style</i>	<i>Score (Sum of TEAM)</i>	<i>Division by 120</i>	<i>Percentage</i>
<i>T—Togetherness</i>	22	$22 \div 120$	18%
<i>E—Enterpriser</i>	44	$44 \div 120$	37%
<i>A—Analyzer</i>	16	$16 \div 120$	13%
<i>M—Motivator</i>	38	$38 \div 120$	32%

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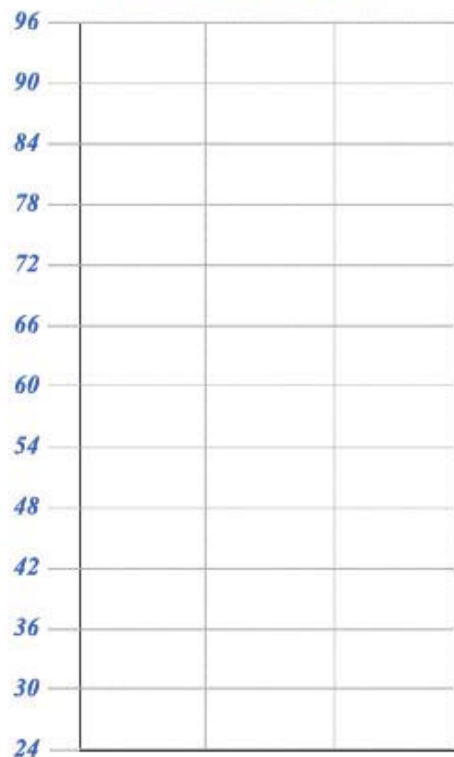
The Personality Balance Grid

Of the four personalities, two are relationally oriented (*T* and *M*), and two are results-oriented (*E* and *A*).

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To get a snapshot of your personal relational/results orientation, add your "T" number to your "M" number and chart the total to the relational line on the grid. Next, add your "E" number to your "A" number and chart the total on the results line on the grid.

Personality Balance Grid



Relationships
T plus M
TOTAL

Results
E plus A
TOTAL

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Interpreting the Personality Balance Grid

The majority of people have totals within eight points of one another on the Personality Balance Grid. The minority of individuals have a grid that is heavily weighted toward relationships or results. (See *samples*.)

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Extremely relational-oriented individuals often maximize the time they spend conversing with and getting to know others, and minimize their time in results-oriented tasks that are accomplished alone. We often call this type of individual a people-person.

Extremely results-oriented individuals will be just the opposite. They often minimize their time communicating—and prefer to lose themselves in individual tasks and projects. Many engineers fit this profile.



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Course #1, Exercise #2

Directions: Choose the correct answer for each statement.

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1. Which personality styles reflect a relational orientation?

- a) Togetherness & Enterpriser
- b) Togetherness & Analyzer
- c) Motivator & Togetherness
- d) Analyzer & Motivator
- e) Enterpriser & Analyzer

2. Which personality styles reflect a results orientation?

- a) Togetherness & Enterpriser
- b) Togetherness & Analyzer
- c) Motivator & Togetherness
- d) Analyzer & Motivator
- e) Enterpriser & Analyzer

Answers

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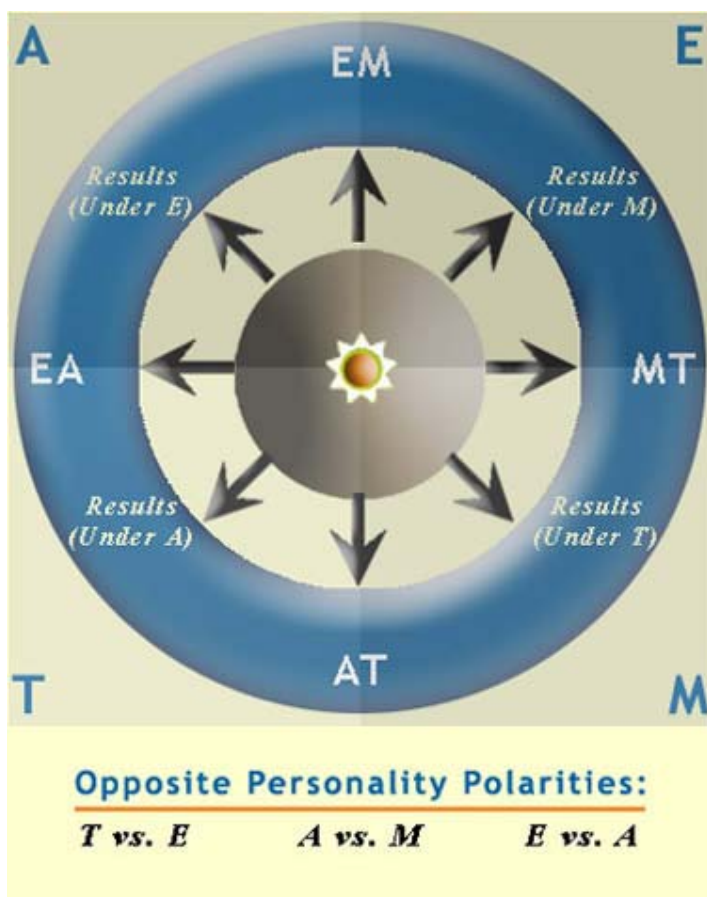
Opposite Personality Personalities

Much of the conflict we face is personality-based. Our personality style often defines how we view people and events, and how we respond to them. Two people of varying personality styles view a single set of events and come away with complete opposite stories of *what happened*.

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Many of the conflicts we face are simply rooted in personality differences. I am not wrong and you are not wrong—we simply perceive matters differently than our clients, and consequently, we have different sets of priorities on how to resolve those conflicts.

The chart below illustrates the natural opposite polarities of the four personalities. It is ironic to note that it has been estimated that approximately 75 percent of married couples are personality polar opposites.



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Understanding Your Personality DNA (Overview)

Every action, communication and response is driven by our personality DNA—a psychological blueprint that directs temperament and behavior. This personality DNA plays a leading role in determining the types of people and processes we are uncomfortable with. Once we come to an awareness of our own personality DNA, we suddenly realize why we instantly click with some personalities and clash with others. We begin to realize why some processes drive us crazy while we seem to revel in others.

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The fact that our personality is blueprinted does not mean that we cannot adjust our behavior, communication and responses. In fact, becoming aware of our personality DNA makes it easier for us to recognize where we need to adjust. There are certain aspects of our personality that we need to throttle back when we are around certain types of clients because those features will rub them the wrong way. With clients who match our own personality style, however, we need to let those particular features of our personality shine.

Beginning on the next page is an overview of the four personality roles (*Togetherness, Enterpriser, Analyzer and Motivator*) that summarizes the strengths, challenges and common areas needing improvement for each style.

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The Togetherness Personality

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Strengths

- Strives for Cooperation & Consensus
- Keeps Everyone Involved
- Peacemaker
- Kind & Caring
- Supportive & Encouraging
- Amiable / Tactful
- Sensitive
- Good Listener

Challenges

- Wants to Please Everyone
- Has Difficulty Making Decisions
- Has Trouble Standing Up for Feelings
- Easily Offended
- Can Be Overly Passive

Self-Improvements

- Make Feelings Clear
- Ask for Clear Directions
- Stop Apologizing for Opinions/ Ideas
- Take Events in Stride
- Focus on Handling Criticism with Emotional Detachment

7 Critical Adjustments

- Go Slowly
- Pay Close Attention When Others Speak
- Demonstrate Concern for Others
- Use Statements of Commitment
- Ask How Others Feel about Your Ideas
- Close with Specific Steps & Time Frames
- Do Not Force a Decision

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The Enterpriser Personality

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Strengths

- Results-Oriented
- Competitive
- Time-Conscious
- Candid
- Risk-Taker
- Thrives on Pressure

Challenges

- Impatient with People & Processes
- May Compromise Quality for Speed
- Overly Individualistic
- Can Be Abrasive/Tactless
- Autocratic Tendencies

Self-Improvements

- Show More Patience with People & Processes
- Articulate More Encouragement
- Make Sure Others See Ideas Before Moving On
- Listen
- Get Help for Detail Work

7 Critical Adjustments

- Establish Your Competence & Philosophy Quickly
- Inquire About the Achievements of Others
- Put Others Behind the Wheel
- Pick Up the Pace; Don't Be a Slave to the Script
- Paint a Broad Brush Stroke
- Allow Others a Way to Win
- Pinpoint When It Will Get Done & Follow Through

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The Analyzer Personality

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Strengths

- Accurate
- Seeks Proof & Validation
- Plans Projects in a Step-by-Step Manner
- Focuses on Facts
- Quality Conscious
- Sets High Standards for Self & Others
- Logical
- Not Easily Duped

Challenges

- Tends toward Pessimism
- Can Be Critical/Judgmental
- Has Difficulty with Spontaneity
- Rigid
- Paralysis by Analysis
- Can Be Impersonal

Self-Improvements

- Open Up to New Ideas & Ways of Doing Things
- Accept People for Who They Are
- Display More Warmth & Affection
- Restrain Judgement
- Work on Stress Management
- Streamline Communications

7 Critical Adjustments

- Slow Your Pace & Listen Intently
- Ask about Others' Concerns & Take Copious Notes
- Do Your Homework; Be Accurate & Specific
- Avoid Exaggeration, Emotion & Over-Promising
- Don't Be Derailed When Others Seem Unenthusiastic
- Summarize Your Presentation Carefully
- Give It Time; Don't Try to Close Too Soon

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The Motivator Personality

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Strengths

- Enthusiastic/High Energy
- Likes Variety
- Tries to Create an Amicable Atmosphere
- Persuasive/Articulate
- Spontaneous
- Laughs Easily/Fun-Loving
- Flexible
- Optimistic

Challenges

- Impulsive
- Lacks Discipline & Follow-Through
- Gets Bored Easily
- Can Have Several Projects Going at Once; Few Are Complete
- Overlooks Analysis
- Whimsical; May Easily Forget Earlier Commitments
- Overuses Enthusiasm
- Has an Aversion to Small Type

Self-Improvements

- Plan & See Projects to the End
- Be Careful in Making Commitments
- Get Organizational Support
- Listen & Restrain Commentary
- Don't Take Credit Where It Is Not Due

7 Critical Adjustments

- Smile & Use an Informal, Playful Approach
- Ask Others about Their Histories, Victories & Goals
- Lead with Passion
- Use Storyselling, Anecdotes, & Metaphors
- Avoid Small Print & Thick Presentations
- Emphasize the Payoff (*Recognition, Income, etc.*)
- Remember that Negativity Is a Deal Killer

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Sample Patterns Overview

Following are some patterns you will find with your clients and co-workers, etc. Some of these patterns are common (*A to E*), and others are rare (*F*).

After each pattern, you will find a summary characterization of the personality pattern in bullet-form.

Our characterizations are taken from both positive and negative observations made by clients of each personality pattern.

(Note: Do not be offended by any negative characterizations; each pattern carries with it both positive and negative perceptions.)

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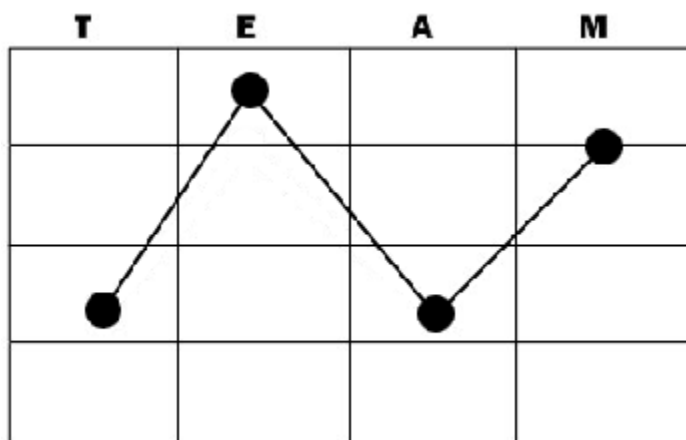
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PATTERN A (E-M Dominant)



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Some characterizations from clients and co-workers:

- Go-Getter
- Confident Competitor
- Highly Energized & Ego-Driven
- Loquacious Leader
- Pushy Persuader
- Loose Cannon

The perceptions of the E-M dominant personality are those of a high-energy, goal-driven person who enjoys a competitive atmosphere.

The downside to this perception is that the E-M dominant personality is often seen by clients as overly individualistic—sometimes tactless—careless and whimsical, quick to promise, but suffering from amnesia on fulfillment.

They are often viewed as natural-born leaders—but just as often questioned by clients on the direction they are leading.

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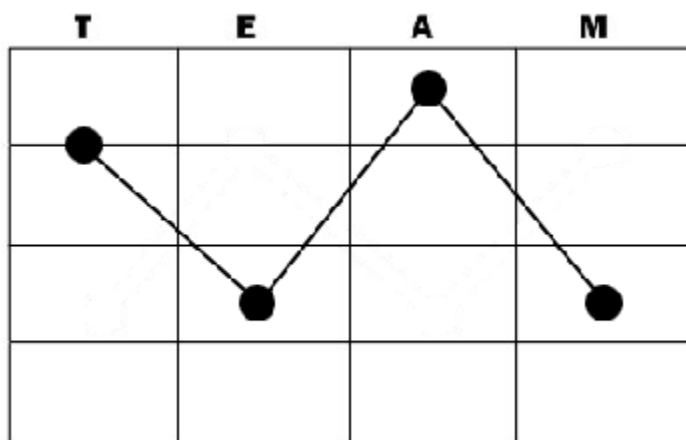
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PATTERN B (A-T Dominant)



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Some characterizations from clients and co-workers:

- Amiable Analyst
- Concerned & Conservative
- Thoughtful Thinker
- Builder & Keeper of the Status Quo
- Routine-Oriented & Defensive

The perceptions of the A-T dominant personality are those of a careful, conservative and concerned approach to work. They excel at planning and processing and usually have high standards.

The downside to these perceptions is that A-T dominant individuals are often seen by clients as slow-to-change, judgemental, defensive and resistant when ideas go cross-grain to their preferred logic. Perfectionism and sensitivity can combine for high-quality, readily embraced ideas—or never-satisfied, easily offended responses to others.

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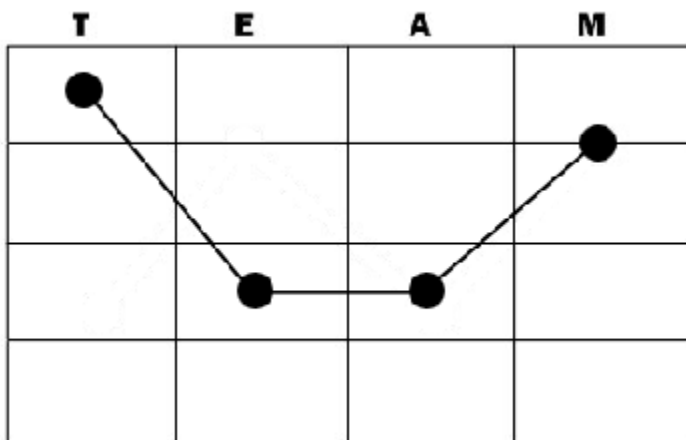
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PATTERN C (T-M Dominant)



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Some characterizations from clients and co-workers:

- People-Person
- Understands People
- Caring & Communicative
- Playful & Friendly
- Slow to Confront Issues
- Overly Social at Work

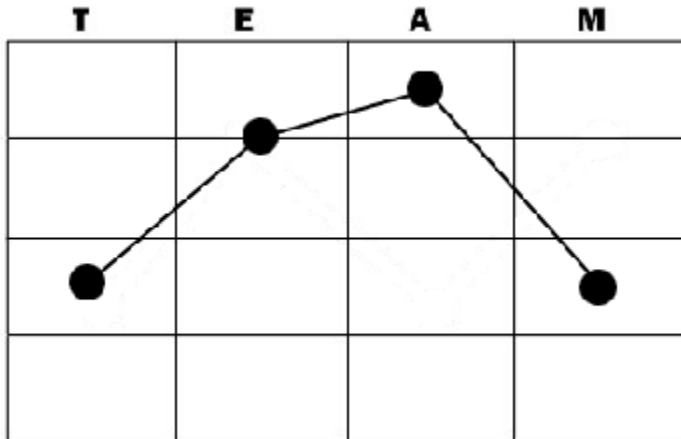
The perceptions of the T-M dominant personality are those of a person who possesses relational skills, enjoys the company of others, and is easy to get along with.

The downside to these perceptions is that some clients feel that advisers with T-M dominant personalities are slow to deal with necessary conflict, fail to stay focused on tasks, and spend too much time chatting rather than doing. Clients sometimes become frustrated with the lack of goal orientation, even though they recognize their natural likeability.

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PATTERN D (A-E Dominant)



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Some characterizations from clients and co-workers:

- Gets the Job Done
- Achieving Analyzer
- Thinks & Acts Like an Engineer
- Productive Pragmatist
- Slave-Driver
- Doesn't Care Who Gets Hurt
- Has a Know-It-All Answer for Everything

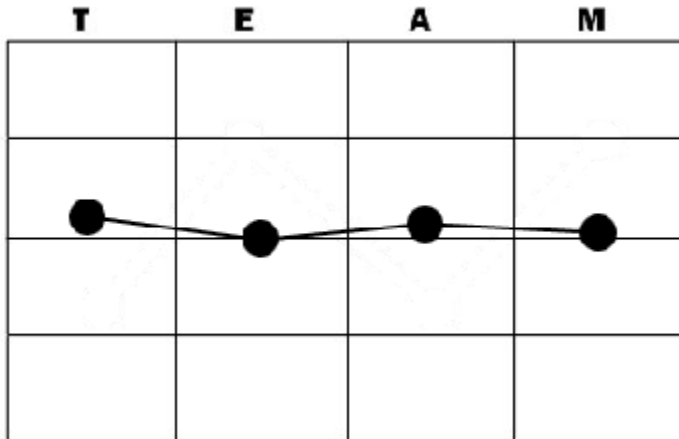
The perceptions of the A-E dominant personality are those of goal-driven, strategic thinking and individualistic high-achievers.

The downside to these perceptions is that the A-E personality is often perceived by clients as putting productivity ahead of people and results ahead of relationships, as well as being obsessed with control. The A-E personality is often seen as individualistic and autocratic—yet, many clients admire their ability to produce.

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PATTERN E (Level Pattern*)



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Some characterizations from clients and co-workers:

- Fair & Diplomatic
- Democratic in Approach
- Flexible
- Good Facilitator—Leads by Consensus
- Chameleon
- Can't Tell Where They Really Stand

The perceptions of the level-pattern personality are those of a person who is a fair (not opinionated) listener and flexible observer. This person has the ability to play many roles, which is often necessary in a management scenario.

The downside to these perceptions is that the level-pattern personality is often seen by clients as changing too easily, hard to predict and lacking identity. Advisers with a level pattern personality are facilitative and diplomatic in nature, and try to relate to all types without being extreme themselves.

(Variation of eight points or fewer on all four personality styles.)*

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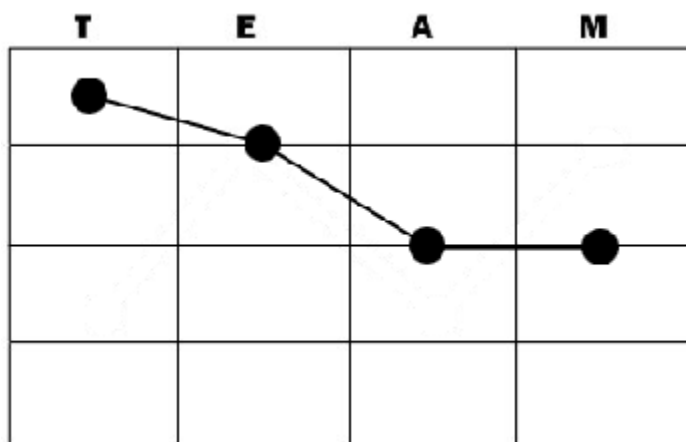
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PATTERN F (T-E Dominant)



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Some characterizations from clients and co-workers:

- Listening Leader
- Driven, but Democratic
- Gets Results without Trampling on Others
- Helpful & Harmonious
- Easily Influenced
- Slow to Pull the Trigger
- Wants to Lead, but Wants to Be Liked too Much

The perceptions of the T-E dominant personality are those of a person who has a good balance of relationships and results. Individuals with a T-E dominant personality try to support others and carry their own load, listen and lead.

Negative perceptions that some clients have are that the T-E personality sometimes grows insecure or flustered under pressure, listens to too many opinions, and that their need to please can interfere with the need to perform. Often the T-E personality will procrastinate too long when confrontations need to take place.

By and large, individuals with a T-E personality are liked and respected for their balanced approach to achieving results.

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Course #1, Exercise #3

Overview: To make this course work relevant to your business, it is important to begin implementing a communication action plan for your clients based on their core personalities.

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Directions: Identify a person you know who fits each particular profile. List three adjustments you could make in your communication and approach that would fit the comfort zone of that individual's personality. (*We have provided a sample adjustment for each personality to guide you in this exercise.*)

Complete this exercise for the T.E.A.M. Personality.

Practice these ideas for approaching these individuals and take note of any change in their response to you.

T—Togetherness

Person Who Fits This Profile:

Adjustments I need to make:

- Take time to listen to his or her input.

-

-

-

E—Enterpriser

Person Who Fits This Profile:

Adjustments I need to make:

- Get to the bottom line as quickly as possible.

-

-

-

A—Analyzer

Person Who Fits This Profile:

Adjustments I need to make:

- Do my homework before we meet.
-
-
-

M—Motivator

Person Who Fits This Profile:

Adjustments I need to make:

- Don't take myself so seriously.
-
-
-



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Locating the Emotional Target (*Introduction*)

The first step in applying T.E.A.M. Dynamics is to develop an awareness of the emotional and relational comfort levels of each personality style. We have attempted to simplify the guidelines for approaching each personality into easy-to-remember bulleted lists. In your initial approach with each personality, remember the following:

37

The Togetherness client looks for:



- Concern
- Respect
- Sincerity

The Enterpriser client looks for:



- Competence
- Confidence
- Organization

The Analyzer client looks for:



- Caution
- Proof
- Thorough Thinking

The Motivator client looks for:



- Flexibility
- Positive Energy
- Sense of Humor

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Follow-Up Training

For more in-depth study on how to apply T.E.A.M. Dynamics to your relationships with clients, co-workers and employees, we have provided the following courses:

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- **T.E.A.M. Dynamics II:** Assessing Client Personality & Communication Adjustments
- **T.E.A.M. Dynamics III:** Managing Diverse Personalities & Personality-Based Conflict

[Click here to return to the Action Assignment.](#)

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Engaging Clients in the Personality Dialogue

In relationship to the personality-based dialogue found in the Communication Dynamics courses, advisers fall into three categories:

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1. **Profile certain clients** with the T.E.A.M. Dynamics Personality Awareness Profile and enter into the personality dialogue as a part of the trust and relationship-building strategy.
2. **Process the Client Conversation Profile** after the client leaves and apply the personality management strategies in future communication.
3. **Apply these personality assessments and adjustments** on an intuitive level during client meetings.



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Applying T.E.A.M. Dynamics Reports to Your Business

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T.E.A.M. Dynamics Reports are available for your practice management, including the following specific reports:

- **Hiring & Interviewing:** Strengths & Challenges; Stressors & Motivators; On-the-Job Narrative
- **Managing & Team Building:** Team Roles; Communication Adjustments; Strengths & Challenges; Stressors & Motivators
- **Selling Adjustments:** Adjustments to Make for the Sale; Discovery, Presentation & Service Keys; Financial Planning Adjustments

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**T.E.A.M. COURSE 1:
 Understanding Your Personality
 & Impact on Others**

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Action Assignment

Before you continue with the program:

1. **Make sure you take the Personality Awareness Profile.** Go over the results with your General Agent/Trainer. Use the free 6-day trial you received when registering to order a Personality Awareness Profile and give it to a client or prospect.

If you have not yet registered for the free trial software, [click here](#) to do it now.

If you have used your free trial and would like to purchase the software, [click here](#). The link will open in a new window so you will maintain your place on this page. *(Be sure to have your TEAM Course username and password handy so you can log in.)*

2. **Review the follow-up training on page 38**, so you are aware of how to proceed.
3. **Once you have completed** both exercises on this page, print the page and have your General Agent/Trainer sign the bottom, then go on to Course II.

Please print this Action Assignment using the "Printer Friendly" button at the top of this page. Once it is complete, sign it and submit it to your General Agent for his or her signature. Give one signed copy to the General Agent and fax/send another copy to Field Development Operations at the corporate headquarters — (513) 794-4515.

***T.E.A.M. COURSE I:
 Understanding Your Personality
 & Impact on Others***

Action Assignment Satisfactorily Completed

DATE: _____

SIGN OFF

General Agent: _____

Sales Associate: _____

Firm (Print): _____

**Continue on to T.E.A.M. Course II:
Assessing Client Personality
& Communication Adjustments**

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T.E.A.M. DYNAMICS

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Overview

In this second course on core-personality communication skills, participants learn two critical relationship-enhancement skills:

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- **How to assess an individual's core personality** from clues provided by body language, voice and conversation patterns and responsive behaviors.
- **The necessary adjustments** we must make in both the content and style of our communication with clients. These adjustments ensure a positive emotional climate where clients feel understood and secure in their purchasing decisions. Participants learn how to read between the lines of conversation and increase their powers of observation regarding:
 - Their clients' facial and physical responses
 - Pitch, tone and pace of speech
 - Listening, asking and responding behaviors

Participants will also learn specific likes, dislikes, desires and challenges of communicating with each of the four core personalities (*T.E.A.M.*).

Finally, participants will learn emotionally intelligent methods of communicating with each personality in order to minimize confusion, conflict, misunderstanding and misdirected advice. This is accomplished by learning to view scenarios through the clients' perspectives and to communicate in such a way that strengthens trust and cooperation.

Too often, advisers are thought to have placed their own interests above those of their clients. Through the T.E.A.M. Dynamics approach, clients are assured that their core needs and comfort levels are understood. This approach ensures the improvement of existing relationships and a sound footing for developing relationships.

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Objectives

The objectives of this course are:

- **Improve Observational Skills:** Participants learn to recognize conversational and physical indicators of the personality style of clients in order to adjust communication to their comfort level.
- **Emotional Awareness:** Participants gain understanding of the idiosyncratic emotional comfort zones of the four personality types in order to avoid conflict with clients.
- **Relationship Improvement:** Participants identify communication approach techniques that fit the preference of each personality style in order to enhance client relationships.
- **Communication Troubleshooting:** Participants learn how to overcome the challenges and difficulties of communicating with each personality style in order to decrease client miscommunications and mismatching of products and services.

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The Core Level of Communication

When advisers are communicating with clients, they often focus on the features and benefits of the services and products they offer. Experienced advisers understand that they must first learn something about the motives and beliefs of their clients to effectively and appropriately serve them. For example, there are clients who are quite risk tolerant and motivated by the desire to become totally independent. There are also clients who are risk averse and motivated to provide for their families.

6



At the very center of a client's actions and reactions is the core personality that drives behavior and communication. Once you discover the personality orientation of a client, you can choose a communication path that leads to clarity, understanding and teamwork between adviser or agent and client.

The classic mistake that many professionals make is to assume that every client will automatically plug in to their style of communication. They won't. This leads to communication breakdown and the disintegration of trust, which is at the heart of the adviser/agent and client relationship.

In the financial services realm, research shows that 80 percent of the people who left their advisers did so because of relationship problems. In most of these cases, the client was satisfied with performance but left because of poor communication.

This course will take you through the subtle adjustments that are necessary with each personality style in order to improve the quality of communication with your clients.

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Introduction to Personality Clues

A person's core personality exhibits itself in many ways.

Some personality clues are explicit in nature, while others are quite subtle. Once you gain an understanding of these clues, you begin to realize how obvious the indicators actually are. Simply being aware of physical and conversational indicators of personality sharpens your powers of observation.

7

The indicators of personality include:

- Eyes
- Facial Language
- Posture
- Physical Style
- Voice Pitch & Tone
- Pace of Speech
- Conversational Style
- Nature of Questions
- Listening Style
- Responses to Presentation



By observing these areas of physical and conversational responses, you will have a strong indication of your client's core personality. These observations lead to crucial adjustments in your approach that improve the communication process.

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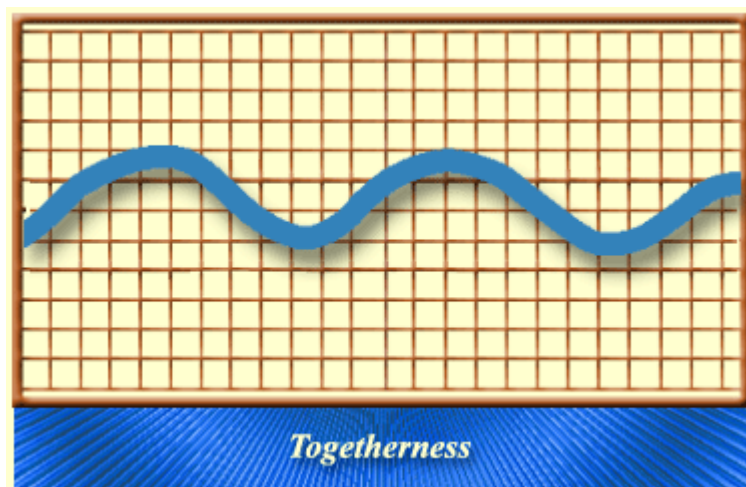
Conversational Clues



The Togetherness Personality

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Individuals of the Togetherness personality are agreeable in conversation—their body language, tone and words affirm the speaker. They are patient and cooperative in conversation. They often apologize before inquiring and act hesitant regarding their own opinions. The Togetherness tone is calm (*not demonstrative*), friendly and respectful. In conversations with the Togetherness personality, it is important to demonstrate good listening skills and project concern and commitment.



Voice Pitch: *Limited Range*

Tone: *Agreeable*

Pace of Speech: *Slow & Steady*

Conversational Style: *Amiable, Plodding, Calm & Passive*

Inquiry Style: *Asks "How" Questions*

Listening Style: *Receptive*

Response Style: *Nods, Cooperates*

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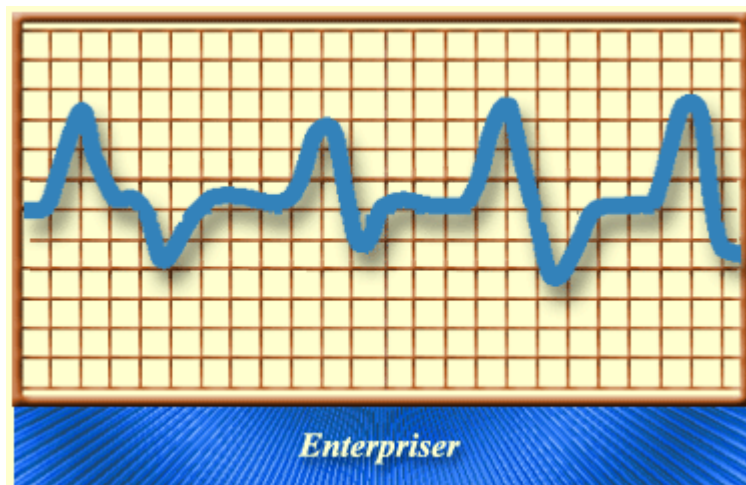
Conversational Clues



The Enterpriser Personality

9

The Enterpriser personality is direct and candid in conversation. Those with this personality style tend to be pointed and emphatic (*one gets the feeling that they are trying to move the conversation along with an undercurrent of impatience*). The Enterpriser's mind is always racing ahead to the conclusion or bottom line, which causes him to push and jump ahead during conversation. Enterprisers are comfortable expressing disagreement and confronting issues directly. Their speech is often blunt, fast-paced and spoken with an air of confidence.



Voice Pitch: *Punches Certain Words*

Tone: *Blunt*

Pace of Speech: *Fast & Punctuated*

Conversational Style: *Confident, Driving, Candid*

Inquiry Style: *Pushes to the Bottom Line*

Listening Style: *Fidgety, Abrupt*

Response Style: *Interrupts, Draws Quick Conclusions*

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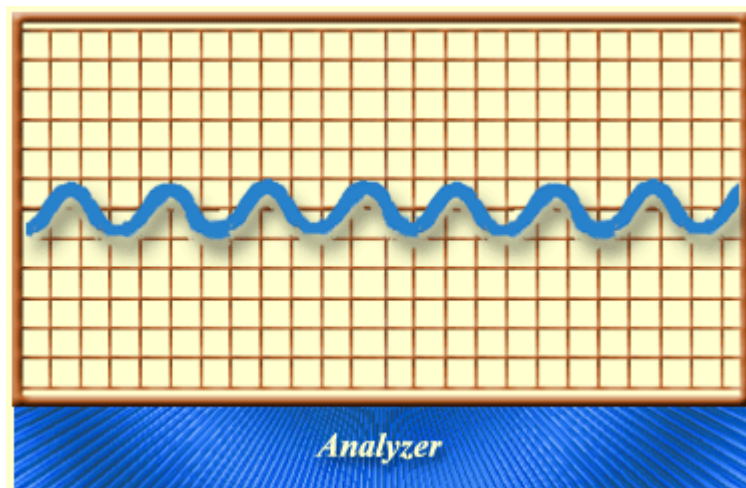
Conversational Clues



The Analyzer Personality

10

The Analyzer personality is inquisitive and deliberate in conversation. Their tone is steady, controlled and precise. Their pace is slower and they often mask emotion and reactions—even during a disagreement. Analyzers often wear an intense and skeptical expression and ask many searching questions such as, "What if...", "What about...?", "Why is it done like this?" to placate their fears of making the wrong decision. This personality style prefers a predictable and linear flow of conversation and grows uncomfortable with distractions and random conversations. In conversation with Analyzers, it is important to patiently provide details and project accuracy, follow-through and professionalism.



Voice Pitch: Monotone

Tone: Controlled, Precise

Pace of Speech: Slow, Deliberate

Conversational Style: Meticulous, Reserved, Uncomfortable with Diversion

Inquiry Style: Gathers Information

Listening Style: Pays Close Attention

Response Style: Looks Skeptical, Hesitant & Responds Cautiously

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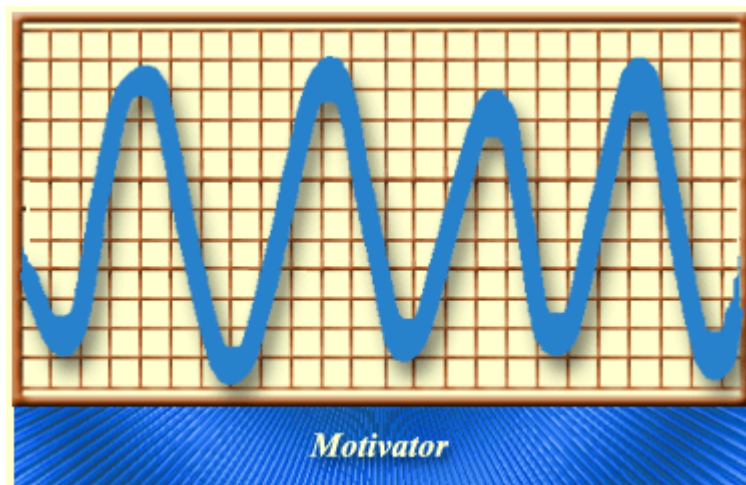
Conversational Clues



The Motivator Personality

11

The Motivator personality is upbeat, animated and flexible in conversation. Motivators prefer a playful and anecdotal approach and quickly grow uncomfortable when forced to deal with a rigid, structured and detailed conversation. They look for creativity and flexibility and are comfortable with a random flow of conversation. Motivators enjoy the spotlight, like to talk and express their views regarding the topic at hand. They enjoy humor and quickly avoid confrontation, negativity and over-seriousness. In conversations with Motivators, it is important to project friendliness and flexibility—and let them talk!



Voice Pitch: Full Range

Tone: Friendly & Upbeat

Pace of Speech: Loud & Fast

Conversational Style: Free-Flowing, Random, Dominant

Inquiry Style: Focuses on People Issues

Listening Style: Always Moving, Holds Back Energy

Response Style: Expresses Feelings, Wants Openness

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Course #2, Exercise #1

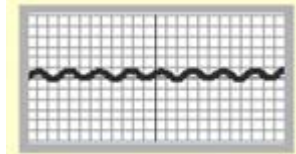
Directions: Match the voice pattern to the personality style.

12a

Conversational Clues

1. Togetherness

A.



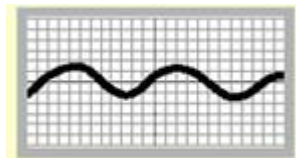
2. Enterpriser

B.



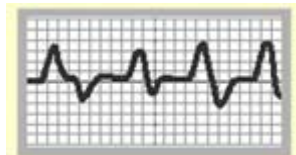
3. Analyzer

C.



4. Motivator

D.



Answers

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Body Language Clues to Personality

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	TOGETHERNESS	ENTERPRISER	ANALYZER	MOTIVATOR
<i>Eyes</i>	<ul style="list-style-type: none"> ■ Soft/Caring ■ Interested 	<ul style="list-style-type: none"> ■ Laser ■ Busy 	<ul style="list-style-type: none"> ■ Scanning ■ Scrutinizing ■ Intense 	<ul style="list-style-type: none"> ■ Open ■ Happy ■ Dancing
<i>Face</i>	<ul style="list-style-type: none"> ■ Pleasant/Reserved Smile ■ Assuring Head Nods 	<ul style="list-style-type: none"> ■ Confident ■ Smirking ■ Defiant 	<ul style="list-style-type: none"> ■ Non-Animated ■ Can Appear Disapproving ■ Anxious 	<ul style="list-style-type: none"> ■ Big Smile ■ Animated
<i>Posture</i>	<ul style="list-style-type: none"> ■ Non-Threatening ■ Conforming 	<ul style="list-style-type: none"> ■ Take Charge ■ Powerful ■ Confident 	<ul style="list-style-type: none"> ■ Rigid ■ Reserved ■ Controlled 	<ul style="list-style-type: none"> ■ Free-Flowing ■ Casual ■ Shifting
<i>Physical Style</i>	<ul style="list-style-type: none"> ■ Steady ■ Plodding ■ Ambivalent Under Pressure 	<ul style="list-style-type: none"> ■ Fast ■ Fidgety ■ Determined Under Pressure 	<ul style="list-style-type: none"> ■ Slow ■ Meticulous ■ Nervous Under Pressure 	<ul style="list-style-type: none"> ■ Fast ■ Random ■ Excited Under Pressure
<i>Voice</i>	<ul style="list-style-type: none"> ■ Constant, Steady Tone ■ Constantly Affirming 	<ul style="list-style-type: none"> ■ Punctuated ■ Emphatic ■ Candid 	<ul style="list-style-type: none"> ■ Monotone ■ Hesitates Before Responding 	<ul style="list-style-type: none"> ■ Laughs Easily ■ Range of Pitches ■ Talks Loud & Fast
<i>Key Phrase</i>	<ul style="list-style-type: none"> ■ "What do you think?" 	<ul style="list-style-type: none"> ■ "Just do it." 	<ul style="list-style-type: none"> ■ "I need to know..." 	<ul style="list-style-type: none"> ■ "This could be fun!"

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Communication Challenges & Obstacles

In the following segment, we highlight the nature and orientation of each personality style, the communication adjustments necessary by the sales professional and the words or phrases that affect the emotional comfort zone of the client.

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We profile each of the four personality styles and identify the specific communication approaches and presentation styles they are most comfortable with. In addition, we identify the likes, dislikes, risk tolerance and challenges of communicating with each personality.

When you consider categories of investment and their objectives, you may see a correlation between a client's personality style and the appropriate categories of investment to suggest based on that style. Two of the personalities are risk-averse by nature (*Togetherness and Analyzer*) and two are comfortable with risk (*Enterpriser and Motivator*).

The changes you make in your communication approach, though simple in nature, will be profound in effect because they will help your clients to be comfortable with the information and ideas you are sharing. You may find, to some degree, that you already have been making these adjustments with people on an intuitive level and the following information will affirm those communication strategies.

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Overview

The Togetherness Personality

When communicating with the Togetherness personality, remember that the relationship must be established before the decision is made. Togetherness individuals decide slowly and choose for emotional reasons. They also follow the examples of others. Individuals of the Togetherness personality style are risk-averse and relationship driven. They prefer a slower pace and traditional thinking.



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Remember these facts about the Togetherness personality:

- Amiable
- Cooperative
- Loyal
- Likes the Status Quo
- Fears Loss of Security
- Tends to Move with the Crowd
- Afraid of the Opinions & Disapproval of Others

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Communication Guidelines

The Togetherness Personality

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Remember the following communication guidelines when dealing with the Togetherness personality:

- Demonstrate respect by paying close attention when they talk.
- Demonstrate sincerity. They want to like you before they work with you.
- Demonstrate a concern and caring for people.
- Go slowly and wait until they trust you.
- Ask about their feelings regarding your product or services and its applicability.
- Do not force them into a buying decision. Avoid pressure tactics.
- Tread lightly because it is easy to offend the Togetherness personality.
- Allow them time to think things through.
- Refer to your satisfied clients.
- Use statements of commitment and seek a commitment.
- Identify specific steps and time frames.

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Emotional Comfort Zone

The Togetherness Personality

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The emotional comfort zone of the Togetherness personality is dealing with people who will take the time to establish a relationship and not be in a hurry doing so. They can be easily offended so it is important to watch the type of humor you choose and avoid controversial topics.

This personality style is most comfortable with a hand-holding, step-by-step approach. Most important, however, is to demonstrate that you are a nice person. Work hard to demonstrate respect and sincerity. The Togetherness personality is bothered by people who are abrasive, overly individualistic, hurried and seemingly unconcerned for the wellbeing of others.

Here are some words in the Togetherness Personality Comfort Zone:

• <i>"We"; "Let's..."</i>	• <i>Commitment</i>
• <i>Concern</i>	• <i>Security</i>
• <i>Sensitivity</i>	• <i>Step-by-Step</i>
• <i>Teamwork</i>	• <i>Long-Term</i>

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Overview

The Enterpriser Personality

Enterprisers are pragmatists. When you communicate with Enterprisers, know your stuff, state your case concisely and imaginatively and show the bottom line quickly! Enterprisers are risk-takers, results-driven and decisive. They prefer a quicker pace and non-traditional thinking.

Remember these facts about the Enterpriser personality style:

- Assumes Leadership
- Impatient
- Can Be Abrasive with Candor
- Results-Driven
- Likes Change & Variety
- Confrontational
- Fears Being Taken Advantage of & Seeks Control
- Has Trouble Listening through a Presentation
- Demands Results

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Communication Guidelines

The Enterpriser Personality

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Remember the following communication guidelines when dealing with the Enterpriser personality:

- Don't talk about your company before you ask what they want (be concise).
- Uncover their top concern/priority.
- Stress bottom-line benefits.
- Establish context upfront; start with the end result and work back.
- Don't waste time with small talk.
- Paint a picture with a broad brush stroke. Enterprisers make decisions with a small amount of information.
- Ask for their opinion and affirm it without sounding like you are pandering.
- Do not persuade Enterprisers with long stories or overly enthusiastic presentations. They see this as contrived and phony.
- Prepare for a quick decision based on facts.
- Allow them a way to win.
- Give options and possibilities and let them decide.
- Don't contradict them, unless you have the information and confidence to back it up.
- Appeal to the ego.
- Allow them to talk themselves out of a position rather than to be talked out of it.

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Emotional Comfort Zone

The Enterpriser Personality

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The emotional comfort zone of the Enterpriser personality is to work with individuals who are competent and confident. This personality quickly sifts out those who do not know their stuff, or who lack confidence in their company or themselves.

Enterprisers want the best choice in the least amount of time. They are often multi-taskers who like to accomplish as much as possible each day. Enterprisers do not like to be told what to do and often take a flexible approach with rules. They are most comfortable working with people who take risks, think for themselves and don't indulge in meaningless talk and activities.

It's important to project professionalism and confidence in your ability to get things done to Enterprisers. They are bothered by slowed progress, too much bureaucracy, beating-around-the-bush answers and lack of follow-through.

Here are some words in the Enterpriser Personality comfort zone:

• <i>Results</i>	• <i>Highly Competitive</i>
• <i>Customized Solution</i>	• <i>Research</i>
• <i>Innovative</i>	• <i>Unique</i>
• <i>Efficient</i>	• <i>Expedite</i>

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Overview

The Analyzer Personality

When communicating with Analyzers, remember that they are operating at a different speed or frequency than most sales professionals. They are detailed, continuous, unemotional and sometimes excruciatingly slow in their decisions. Because of their highly cautious nature, proof is paramount in importance in your presentation. Analyzers are risk-averse and results-driven. They prefer a slower pace and traditional thinking.



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Remember these facts about the Analyzer personality:

- Wants Detail
- Desires Accuracy
- Doesn't Deal Well with Criticism of Work or Ideas
- Has Trouble Pulling the Trigger on Decisions (*Plagued by "What Ifs"*)
- Perfectionistic

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Communication Guidelines

The Analyzer Personality

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Remember the following communication guidelines when dealing with the Analyzer personality:

- Slow your pace; listen intently.
- Be accurate. Don't approximate or round off numbers.
- Do your homework. Be prepared to give every detail about your products or services.
- Set the stage for trust using data.
- Explore their interests (*the latest technologies, etc.*).
- Support each feature/benefit statements with logic and rationale.
- Never say or imply, "Hurry up!"
- Summarize your presentation carefully.
- Detail how you'll follow through.
- Don't ever say, "I know you'll like this."
- Avoid hyperbole and animated presentations.
- Allow time for decisions.

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Emotional Comfort Zone

The Analyzer Personality

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The emotional comfort zone of the Analyzer personality revolves around accuracy and predictability. It takes time to establish credibility and trust—and the Analyzer is not willing to take a risk without thorough safeguards and preparation. Analyzers tend to see things in black and white and harshly judge an action or statement that does not appear to comply with the guidelines or rules. Analyzers are bothered by tactics used by many in the sales realm: over-commitment, hyperbole, shifting attention from issue and trying to charm people with personality. Analyzers are most comfortable with factual, logical approaches delivered calmly and patiently. They are interested in seeing accuracy and follow-through with commitments that are made.

Here are some words in the Analyzer Personality comfort zone:

• <i>Caution</i>	• <i>Logical</i>
• <i>Research</i>	• <i>Analysis</i>
• <i>Projections</i>	• <i>Thorough</i>
• <i>Proof</i>	• <i>High Standards</i>

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Overview

The Motivator Personality

Communicating with the Motivator personality style requires that you make your presentation fun, interesting and innovative. Motivators are talkative, emotional and quick on the trigger. They desire a friendly and flexible atmosphere. Motivators are risk-takers and relationship driven. They prefer a quicker pace and innovative thinking.

Remember these facts about the Motivator personality:

- Conversationalist
- Desires Recognition
- Optimistic
- Is Often Disorganized
- Fears Rejection & Disapproval
- Likes a Friendly Atmosphere
- Often Reveals True Feelings
- Likes Excitement & Action
- Easily Distracted or Bored

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Communication Guidelines

The Motivator Personality

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Remember the following communication guidelines when dealing with the Motivator personality:

- Pick up your pace and energy.
- Talk about the potential of your product and services.
- Describe your benefits and program with passion.
- Use storytelling, illustrations, anecdotes, metaphors and true-life experiences.
- Be prepared to respond to a quick decision.
- Ask lots of questions about your clients—their histories, victories, etc.
- Provide an opportunity for your clients to vocalize their goals.
- Remember, they are sold more on your enthusiasm and convictions than they are on features and proof.
- Use an informal and sociable approach.
- Avoid small print and thick presentation.
- Focus on pay-offs for them (*recognition, excitement, income*).

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Emotional Comfort Zone

The Motivator Personality

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The emotional comfort zone of the Motivator personality is working with people who are friendly and flexible in their approach. Motivators are frustrated by people who are married to routines, engage in great detail and who are overly serious in their approach. Motivators enjoy the art of conversation—learning about people and talking about themselves. The social aspect of doing business is important because they feel it reveals who people really are and their level of flexibility. Motivators do not like being forced in or confronted. They are conflict-averse and avoid confronting negative issues. Motivators like to work with people who are easy to work with, have a sense of humor and are optimistic in their approach. They are energized by competition and possibilities.

Here are some words in the Motivator Personality comfort zone:

• <i>Quick</i>	• <i>Cutting Edge</i>
• <i>Easy</i>	• <i>Competitive</i>
• <i>Innovative</i>	• <i>Possibilities</i>
• <i>Fun</i>	• <i>Fluid; Flexible</i>
• <i>Big; Exponential</i>	• <i>Opportunity</i>

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Exercise #2

Directions: Match the emotional comfort zone words to the personality style that prefers them. Letters may be used more than once.

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Emotional Comfort Zones

Emotional Comfort Zone Words	Personality Styles
<input type="checkbox"/> 1. Expedite	A. Togetherness
<input type="checkbox"/> 2. Fun	B. Enterpriser
<input type="checkbox"/> 3. Concern	C. Analyzer
<input type="checkbox"/> 4. Thorough	D. Motivator
<input type="checkbox"/> 5. Sensitivity	
<input type="checkbox"/> 6. Proof	
<input type="checkbox"/> 7. Results	
<input type="checkbox"/> 8. Big, Exponential	
<input type="checkbox"/> 9. Teamwork	
<input type="checkbox"/> 10. Caution	

Answers

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Relational Styles

The Togetherness Personality

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I WANT:

- *A reliable, stable relationship.*

I DON'T WANT:

- *To be coerced or pushed into a decision. I have trouble saying no.*
- *People to be upset with me. I seek approval.*

YOU MUST CONVINC ME:

- *Your product or service will bring simplicity and security into my life.*
- *You will be there to support me when I have questions or problems.*

It is important to remember that the Togetherness personality places the highest premium on the quality of relational skills. Their antennae are up and alerted to insincerity, disrespect, impatience, pressure tactics and opportunistic approaches. They are looking for supportive and secure business relationships where the adviser or agent takes the time necessary to explain the process and to answer questions in a personable and caring manner.

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Relational Styles

The Enterpriser Personality

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- I WANT:**
- *To be in control.*
 - *Results.*

- I DON'T WANT:**
- *To be taken advantage of.*
 - *To be slowed down.*

- YOU MUST CONVINC ME ON:**
- *What your product will do for me.*
 - *The results I will see.*

The Enterpriser personality places the highest premium on achieving results in a timely, efficient and orderly fashion. Enterprisers are rarely willing to relinquish control. They can quickly perceive self-interest or a lack of results orientation on the part of the adviser or agent. Enterprisers are typically comfortable with risk, but want to be informed of those risks in candid terms. Enterprisers become more tolerant, patient and relational once the adviser or agent demonstrates competence. Enterprisers quickly and often harshly confront any inconsistencies, perceived misrepresentations or omissions on the part of the adviser or agent.

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Relational Styles

The Analyzer Personality

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I WANT:

- *Accuracy, assurance and proof.*

I DON'T WANT:

- *To be criticized.*
- *To be hurried.*

YOU MUST CONVINC ME ON:

- *The logic of investing in your product.*
- *Your track record.*

The Analyzer personality is logical and linear in its relational style. Analyzers are often not interested in what other people do or what they prefer, because they assume others do not possess the same high standards. Analyzers present logical questions and want factual answers. They become skeptical when they hear hyperbole, zealotry and anecdotal evidence. Analyzers are more interested in background credentials and performance records, along with the rationale behind the efforts. Relationships will quickly falter when the adviser or agent uses pressure, hastens decisions or criticizes the Analyzer's judgment. The wise adviser or agent will take a logical, organized and linear approach and base recommendations on accurate data. Understand that there will be a natural hesitance, resistance and discomfort with changes.

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Relational Styles

The Motivator Personality

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- I WANT:**
- *To be noticed.*
 - *To persuade and influence others.*

- I DON'T WANT:**
- *To be rejected or ignored.*
 - *To get boxed in with detail.*

- YOU MUST CONVINC ME ON:**
- *Who is using your product.*
 - *How I can promote it to others.*

The Motivator personality is the most intuitive in its relational style. Motivators try to get a feel for the type of individual they are dealing with. They look for the positive energy, which is expressed in optimism, enthusiasm and a congenial manner. While Motivators expect their advisers to understand and be in control of details, they do not want to be bothered with any of the details. Motivators want them to paint broad brush strokes, use illustrations and provide real-life testimonials of their services. Motivators feel a need to articulate their ideas, experiences and opinions. The wise adviser or agent needs to accommodate this need to articulate and not get flustered when the presentation or meeting goes off track.

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Conversational Styles & Challenges

The Togetherness Personality

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CONVERSATIONAL STYLE:

- *Focused listener.*
- *Wants to understand how your idea works.*
- *Apprehensive to share opinions.*
- *Often apologetic when inquiring or clarifying.*

CHALLENGES IN COMMUNICATING WITH THE TOGETHERNESS STYLE:

- *Oversensitivity; can be easily offended.*
- *Stretching their thinking and routines.*
- *Inclination to move with the crowd.*

When communicating with the Togetherness personality, it is important to clearly explain how your products, services and processes work—in a patient and respectful manner. You will face the challenges of oversensitivity, fear of breaking new ground and hesitancy to make decisions. Be careful with your humor. Make recommendations confidently—without being overbearing—and demonstrate how you work with others. Encourage questions and diplomatically inquire about your clients' feelings regarding the ideas you have offered. Work with them, not just for them.

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Conversational Styles & Challenges

The Enterpriser Personality

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CONVERSATIONAL STYLE:

- *Professional A.D.D.—short attention span.*
- *Likes to challenge ideas.*
- *Strong opinions and ambitions.*
- *Complete candor.*

CHALLENGES IN COMMUNICATING WITH THE ENTERPRISER STYLE:

- *Inattentive.*
- *Impatient.*
- *Demanding posture.*

When communicating with Enterprisers, it is important to let them articulate their bottom line—and the strategies for adhering to it. Enterprisers are more interested in strategies than they are in details. They admire a confident, succinct presentation and like the opportunity to express their own opinions and ideas. Do not begin a presentation or meeting without telling them upfront where it will end or how long it will take. Enterprisers like to multi-task and easily grow distracted and impatient—especially when they do not see the relevance of the topic at hand. To get along with this personality style, the adviser or agent must be skilled at handling candor, strong opinions and the occasional ultimatum!

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Conversational Styles & Challenges

The Analyzer Personality

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CONVERSATIONAL STYLE:

- *Contemplative.*
- *Slow to commit to an idea.*
- *Likes to prove and validate opinions.*

CHALLENGES IN COMMUNICATING WITH THE ANALYZER STYLE:

- *Getting them to commit to a decision.*
- *Impersonal and unemotional.*
- *Overly cautious.*

When communicating with the Analyzer personality, it is important to allow plenty of time for the meeting—the presentation, time questions and answers and for the decision process. It is important to check your own body language and tone for any hint of impatience or frustration with providing detailed information and proof. Many Analyzers appear poker-faced, skeptical or even disapproving—when, in fact, they are simply mulling over the information. Their nerves are easily jangled when they are asked to make a decision based on relatively new information. Because Analyzers are typically perfectionists, they often fear that they will make the wrong decision—simply because they didn't look closely enough at the data. Analyzers need to be assured that your products and services fit well within their comfort zone and that you will follow through with your commitments and services. Be thorough, accurate, organized and deliberate in your communications with Analyzers and provide documentation wherever and whenever you can.

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Conversational Styles & Challenges

The Motivator Personality

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CONVERSATIONAL STYLE:

- *Animated; talkative.*
- *Likes to play with ideas.*
- *Will support the opinions of others. (Remember that their opinions are fluid and can change quickly.)*

CHALLENGES IN COMMUNICATING WITH THE MOTIVATOR STYLE:

- *Keeping them focused, practical and organized.*
- *Their impulsiveness.*
- *Making sure they absorb key information.*

When communicating with the Motivator personality, it is important to achieve your objectives without being too controlling of the conversation in the process. Keeping a sense of humor and an attitude of flexibility are keys to relating with this personality. They will be inclined to make quick decisions—and want you to respond. You must find a way to make sure they understand the decisions they are making without bogging them down in details. It is not only important to organize a game plan, but also to give them room for input regarding that plan. Motivators want to hear what you have done for others. When they attempt to make impulsive decisions, it is important for advisers to be persuasive, but not confrontational in their response. Friendliness, open-mindedness and frequent contact are important in relating to the Motivator.

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Client Conversation Profile Introduction

There are two ways to go about assessing the personality styles of your clients. The first way is to simply administer a profile. Many have incorporated this profile into their practice and introduce it by telling their clients, *"We like to make sure we are building a solid relationship with each client and we have found this personality profile to be very helpful in the process."*

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Some advisers, however, prefer to assess a client's personality using the following Client Conversation Profile. After consulting with your client, you can take two to three minutes to complete the profile and it will give you a strong indication of the personality type you are dealing with.

The Client Conversation Profile assesses patterns and habits of speech, as well as body language indicators. Once you've completed the profile with your clients, you will have a good idea of their leading, supporting and villain roles. The villain role is the personality that causes them the most tension. If their villain role matches your leading role, you will want to exercise extra caution when communicating with that client.

Once you've assessed your client's personality style, you can then refer back to the communication adjustments for that style.

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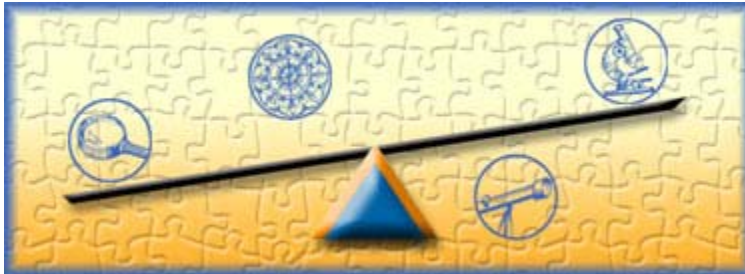
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Engaging Clients in the Personality Dialogue

In relationship to the personality-based dialogue found in the Communication Dynamics courses, advisers fall into three categories:

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1. **Profile certain clients** with the T.E.A.M. Dynamics Personality Awareness Profile and enter into the personality dialogue as a part of the trust and relationship-building strategy.
2. **Process the Client Conversation Profile** after the client leaves and apply the personality management strategies in future communication.
3. **Apply these personality assessments and adjustments** on an intuitive level during client meetings.



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Applying T.E.A.M. Dynamics Reports to Your Business

T.E.A.M. Dynamics Reports are available for your practice management, including the following specific reports:

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- **Hiring & Interviewing:** Strengths & Challenges; Stressors & Motivators; On-the-Job Narrative
- **Managing & Team Building:** Team Roles; Communication Adjustments; Strengths & Challenges; Stressors & Motivators
- **Selling Adjustments:** Adjustments to Make for the Sale; Discovery, Presentation & Service Keys; Financial Planning Adjustments

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**T.E.A.M. COURSE 2:
 Assessing Client Personality
 & Communication Adjustments**

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Action Assignment

1. **Review the Introduction to the Client Conversation Profile** (on page 35) with a friend or your General Agent/Trainer. Once you are comfortable with the approach, use your free 6-day trial to order a profile and give it to a client or prospect.

If you have not yet registered for the free trial software, [click here](#) to do it now.

If you have used your free trial and would like to order the software, [click here](#). The link will open in a new window so you will maintain your place on this page. *(Be sure to have your TEAM Course username and password handy so you can log in.)*

2. **Go over the results** with your General Agent/Trainer.
3. **Go on to T.E.A.M. Course III.**

Please print this Action Assignment using the "Printer Friendly" button at the top of this page. Once it is complete, sign it and submit it to your General Agent for his or her signature. Give one signed copy to the General Agent and fax/send another copy to Field Development Operations at the corporate headquarters — (513) 794-4515.

***T.E.A.M. COURSE II:
 Assessing Client Personality
 Communication Adjustments***

Action Assignment Satisfactorily Completed

DATE: _____

SIGN OFF

General Agent: _____

Sales Associate: _____

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**Continue on to T.E.A.M. Course III:
Managing Diverse Personalities
& Personality-Based Conflict**

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T.E.A.M. DYNAMICS

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Overview

In this third course on personality-based communication skills, participants learn three skills critical to positive relationship management:

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1. How to minimize conflict scenarios and diffuse existing personality-based conflicts
2. How to motivate individuals by appealing to their core-personality strengths
3. How to recognize and minimize on-the-job stresses related to core-personality weaknesses

Much of the conflict we experience with clients, employees and co-workers is personality-based. In this course, participants learn effective approaches that factor in the predictable actions and reactions of the four core personalities.

Participants learn key techniques for tempering their own personalities—based on biases, compromise and consensus-building as a means for diffusing or preventing conflicts. Additionally, participants learn the predictable behaviors of each personality and communication methods for reversing negative climates. Participants also learn how to recognize and appeal to the personality-based strengths of clients, employees and co-workers. They learn how to avoid demotivation and agitation by communicating and behaving within the comfort zone of each personality style. Participants who complete this course will be taught to formulate a communication blueprint for use in managing and consulting their clients, co-workers and employees.

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The Power of Perceptions

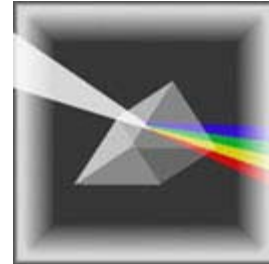
The Source of Personality-Based Conflicts

The greatest leap we can take toward resolving conflicts is to understand the source of those conflicts. We often assume that conflict exists because we cannot agree on a solution, answer or direction with our adversaries. This assumption fails to take into consideration the reasons why we do not agree. Many disagreements are due simply to the fact that we do not all see events in the same way—because of the nature of our core personality.

Our core personality (*T.E.A.M.*) acts as a filter or lens for every event. Each event is interpreted through the basis of that core personality—as are our responses to those events. Two personalities can view a single event and come away with two separate accounts of what happened. Likewise, four different personalities can witness one event and come away with four separate interpretations of that event. It stands to reason that if four different personalities interpret an event four different ways, they will also come up with four different responses or answers to those events.

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Parable

Johnny Falls Down

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The following parable illustrates the phenomena of **personality-influenced perceptions** and their role in conflict.

Johnny and his four friends were riding their bicycles when Johnny fell down. Here is how his four friends responded to the situation:



TOGETHERNESS FRIEND: *"Are you okay? Can I help you?"*

ENTERPRISER FRIEND: *"Where did you learn to ride a bike? Hurry up, we're going to be late!"*

ANALYZER FRIEND: *"You'd better not move. You could have an internal injury. You know, you wouldn't have fallen off if your shoe had been tied."*

MOTIVATOR FRIEND: *"That was cool! Did you see that flip? Unbelievable!"*

The next day at school, Johnny's four friends gave their idiosyncratic accounts of what had happened:

TOGETHERNESS FRIEND: *"I really wonder if these are people I want to be friends with. When Johnny falls off his bike, one person yells at him to get up, another criticizes him and another laughs at him. Those people have no sensitivity."*

ENTERPRISER FRIEND: *"Johnny is such a klutz! Just because he can't ride a bike, we're late and end up with the worst seats. Next time he doesn't get invited."*

ANALYZER FRIEND: *"Johnny is so careless. I still think he should go see the doctor. Sometimes these internal traumas kick in late. I mean, I've heard of people dying."*

MOTIVATOR FRIEND: *"It was hilarious! He goes flying, does a flip. I give him a '10'—Olympic quality. There was blood everywhere!"*

The Moral of the Story

We often think conflict arises because we can't agree on a solution. Johnny's story illustrates that, because of core personality, we have trouble just agreeing on what happened—even when we all witness the same event.

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The Other Person's Perspective

Many of our conflicts are due simply to this phenomenon of personality-based interpretation and response. The first and most powerful step in conflict management is to allow yourself to see the event through the vantage point of the personality you are dealing with. The chief question we need to ask in conflict is not, "*What do you think we should do?*" but, rather, "*What did you see happen?*" or "*What is the problem from your vantage point?*"

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Too often conflicts escalate as we argue over the proper response—even though we have not yet agreed on what happened in the first place! As our parable illustrates, each person witnesses a different set of events within one event as biased by their core personality. Until we understand the other person's interpretation of the event, our attempts at resolution can be futile.

A large percentage of our conflicts are rooted in core-personality perceptions. Just how much is rooted in personality is debatable because of the subjectivity of conflict. We know it is substantial, however, because of the amount of personality conflicts we experience with co-workers, employers and clients.

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The Power of Empathy

The first and most crucial emotional competence necessary for resolving conflict is empathy—the process of identifying emotionally with another person. Empathy—the cornerstone of all conflict management—is a skill demonstrated by those who have mastered the art of keeping themselves disentangled from conflicts.

Daniel Goleman's landmark research on emotional intelligence found in highly successful individuals identified five areas of emotional smarts:

- Awareness
- Restraint
- Resilience
- Empathy
- Rapport

Before we instruct on the social skill of personality-based conflict resolution, it is important to state the foundational need for empathy as a precursor to resolving personality-based conflicts. Because of our core personality, we cannot force ourselves to feel events the same way another person does. However, we can, at the very least, understand that others feel events differently than we do and that they are neither right nor wrong for the way they process events. The good news is neither party is wrong, because perception and response are rooted in core personality.

If we want to resolve conflicts, our first step is toward empathic identity and understanding the other person's vantage point. Once we take this step, people let down their defenses and are more willing to meet halfway.

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The Lens of Personality

A good metaphor for developing understanding when dealing with opposing personalities is to realize that each personality sees the world through a unique lens.

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- **The Togetherness personality** sees the world through a magnifying glass—always trying to capture that "Kodak moment"—and is always concerned about others in the process.
- **The Enterpriser personality** sees the world through a telescope and wants to keep moving toward a distant shore (*the goal*).
- **The Analyzer personality** sees the world through a microscope and is constantly trying to get a closer, more detailed view.
- **The Motivator personality** sees the world through a kaleidoscope, which captures the fun, spontaneity and excitement of life.



Using these metaphorical lenses can help us view a conflicted situation through the eyes of the other person—even if that person is our personality-opposite. Understanding the perception of the other party is the great empathetic leap that makes most conflicts reasonable and many broken relationships reconcilable.

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Whose Fault Is It?

The Roots of Stress in the Workplace

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Once it becomes clear that a person's actions and reactions are traced to core personality, our approach toward co-workers, employees and clients shifts from blaming and manipulating to negotiating compromises — or, simply meeting at the halfway point of our two personalities.

Each person's core personality is like the DNA that drives their behavior. If you attempt to alter the DNA of an individual's core personality, you will meet resistance, frustration and even hostility. Certain modes of behavior are so far outside the comfort zone of their personality that they cannot enter those modes without becoming tense and stressed in the process. Advisers who constantly force these modes, or employees who constantly resist these modes soon become the focal point for conflict.

Resolving core-personality-based conflict plays a significant role in both compliance and production issues. Following are some examples of how core personality-based conflict comes into play:

- **Scenario One:** The Enterpriser manager who barks orders at a Togetherness adviser or agent, who is highly sensitive by nature.
- **Scenario Two:** This same Enterpriser client will frustrate an Analyzer adviser or agent by pushing for closure on a project but not providing necessary details.
- **Scenario Three:** The Analyzer manager who takes an impersonal approach focusing only on process (to the neglect of personal relationship), risks alienating the relationally focused Togetherness and Motivator personalities.
- **Scenario Four:** A Togetherness client who is easily offended by the high Enterpriser's candor and that same Enterpriser is frustrated by the Togetherness client's indecisiveness.
- **Scenario Five:** The Motivator agent or adviser who feels that the Analyzer client impedes progress with pessimism, need for detail and constantly second-guesses.

(Note: the inverse of the above scenarios would also be true.)

To diffuse conflict in these scenarios, it is important for each personality involved to meet the other halfway in establishing a comfortable mode of working and relating. For example, we have seen individuals in similar scenarios improve their workplace relations by:

1. Confronting personality-based tensions
2. Establishing halfway-point personality compromises

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Negotiating Core-Personality Compromises

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Scenario One: Enterpriser Manager & Togetherness Adviser or Agent

Enterpriser Compromises

- Find diplomatic ways to state case.
- Ask; don't order.
- Pause and inquire when you observe frustration.

Togetherness Compromises

- Don't regard Enterpriser candor or abrasion as a personal attack.
- Write directives down and reiterate.

Scenario Two: Enterpriser Client & Analyzer Adviser or Agent

Enterprisr Compromises

- Try to understand their need for thoroughness.
- Wait for their input before pushing to completion.
- State your case in an open-minded manner.
- Demonstrate patience with tone and body language.

Analyzer Compromises

- Find areas of agreement and restrain impulse to judge.
- Listen to and consider innovative input.
- Play Devil's Advocate without being negative or cynical.

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Negotiating Core-Personality Compromises

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Scenario Three: Analyzer Manager & Motivator Employee

Analyzer Compromises

- Try to be more personal in approach.
- Understand that processes are most successful when people are enthused.
- Allow time for socializing.
- Ask for creative input.

Motivator Compromises

- Get help to organize ideas before presenting them.
- Prepare a plan for follow-through.
- Understand their need for detail.
- Stay focused and take notes.

Scenario Four: Togetherness Client & Enterpriser Adviser or Agent

Togetherness Compromises

- Understand their need for action and results.
- Keep a sense of humor regarding candor. Enterprisers can take some ribbing.
- Ask for their input and give a time frame for their decisions.

Enterpriser Compromises

- Be mindful of Togetherness sensitivity before responding.
- Talk through both options and consequences.
- Temper opinionated tone.

Scenario Five: Motivator Adviser or Agent & Analyzer Client

Motivator Compromises

- Don't express ideas that are not well thought out.

Analyzer Compromises

- Ask the Motivator where you can get the details. Don't expect to get the

- Slow down presentation and make a short outline.
 - Regard pessimism as helpful trouble-shooting rather than shooting down.
 - Ask the question, "What will we need to do to make this work?" Take notes.
- details from him/her.
 - Be prepared to hear big-picture concepts.
 - Be willing to play around with ideas.
 - Make sure your expression is not communicating negativity or tension.

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Unreasonable Expectations

It is unreasonable to expect everyone in your workplace to adjust to all of the quirks and characteristics of your personality style. Those with a similar pattern as yours will be comfortable with your natural form of relating. It is with these people that few compromises are necessary and you can just be yourself.

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Diplomacy, restraint and compromise enter in most often when we are dealing with those of opposite patterns. If we refuse to restrain and compromise our own personality habits when dealing with those of conflicting personality patterns, we will be met with an equally powerful force of resistance and resentment.

It is reasonable to expect that if you are willing to temper your own personality impulses, then the other parties—sensing a step in their direction—will alter their response. A reasonable expectation is to negotiate compromise by first demonstrating compromise. As the above scenarios demonstrate, one party cannot negotiate compromise for both parties. True compromise involves both parties taking equal steps toward the halfway point of a working comfort zone.



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Developing Confrontational Skills

When most people think of the word "*confrontation*" there is an immediate association with negative emotions and the escalation of conflict. Confrontation, when handled properly, can be a very positive emotional process that results in not only resolving the conflict but in preventing future conflicts as well. The crucial step is in the approach.

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We have found two factors crucial to decreasing tension and motivating resolution. These two factors are:

1. A self-deprecating sense of humor
2. A sense of humility

It is a physiological fact that laughter and tension cannot occupy the same space at the same time. For example, if you lifted a hundred-pound weight and someone told you a funny joke, you would drop the weight because the laughter diffuses the tension that allows you to lift the weight. This illustration translates into a good metaphor for the baggage people carry in the workplace—which often translates into interpersonal conflict. Approaching these conflicts with a self-deprecating sense of humor can help to diffuse the tension that prolongs the existing conflict.

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Humor & Humility Approach

Do we mean to imply that a joke will resolve a conflict?

No. But we have observed that a self-deprecating sense of humor in your approach will lower the defenses of the other party. Compare these approaches in confronting a conflict.

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JOE (self-justifying and subtly accusatory): *"Fred, I seem to remember at our last meeting that you were going to contact everyone about moving up the training date with this client. Now, I'm getting irate calls saying they haven't been given enough notice or information."*

FRED: *"You told me you were going to clear the date with the client first, then we would talk about the agenda. I didn't hear from you and figured it was a no-go."*

JOE: *"Wrong. We're up a creek now. You'd better call everyone ASAP!"*

In this scenario, Fred forgot to follow up with Joe about scheduling a meeting. If Joe were to take the humility and humor approach, he would handle the situation quite differently:

JOE: *"Fred, I don't know if it's my ADD or my short-term memory loss, but I can't remember if I called you about that training date. I apologize ahead of time if I left you in the lurch. Now, I've got everyone upset about the late notice. How do you think we should proceed from here?"*

Fred isn't going to grow defensive when there is no offensive. Joe presents his own possible culpability first. By using a self-deprecating approach, he is not dismissing his action, just lightening the atmosphere and preparing to move forward. There is none of the finger pointing and blaming going on, which cause conflicts to escalate.

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The Advantages of the Humor & Humility Approach

How do humility and self-deprecating help in approaching conflict? They help in a number of ways:

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<i>Advantages of a Self-Deprecating Sense of Humor</i>	<i>Advantages of a Humble Approach</i>
<ul style="list-style-type: none"> • <i>People who can laugh at themselves are easier to communicate with in conflict situations.</i> • <i>Laughter releases tension and acts as a stress valve.</i> • <i>People are attracted to laughter and smiles.</i> • <i>A self-deprecating sense of humor indicates a secure and confident individual.</i> 	<ul style="list-style-type: none"> • <i>A humble approach is based on an open mind.</i> • <i>A humble approach demonstrates an awareness of personal weaknesses as well as strengths.</i> • <i>A humble approach encourages a humble and responsible response.</i> • <i>A humble approach demonstrates that you value the relationship at hand.</i>

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Humility-Based Approach

A humility-based approach is indicated with these kinds of statements:

- "I may have messed up here."
- "I think I goofed."
- "Did I handle that properly?"
- "Do you think there's a better plan?"
- "I apologize."
- "I'll need some help for this to work."
- "Did I follow through on the way we'd talked on that project?"



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People who are not accustomed to such an approach may **struggle** with such prefaces at first but will soon be convinced by the change in tone and response from the other party.

The T.E.A.M. Dynamics approach to conflict teaches individuals to recognize the natural strengths and flaws of each personality style. Once we realize that certain flaws or challenges are inherent in each personality style, we can more easily adapt a sense of humor and humble demeanor regarding those flaws.

On the other hand, tension and conflict build when we take the opposite path of accusation and self-justification. This path only breeds resentment—even when we are *"in the right."* Bjorn Borg's sporting maxim of, *"Win without bragging and lose without excuse"* also serves well in the realm of managing conflicts.

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From "Me" to "We"

The T.E.A.M. Dynamics approach is premised on moving the conflict from a "me-centered" to a "we-centered" resolution. Such a resolution is not possible without grace and humor on the part of the manager. *"Never trust a man who hasn't fallen off his horse 50 times"* expresses the sentiment that we respect those who:

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- Understand their vulnerability to making mistakes
- Readily admit their mistakes
- Possess the humility that comes from experience

When Is It "I" & When Is It "We"?

The most relationally skilled managers seem to share some common philosophical approaches when things go wrong and conflicts arise. We have observed two relational *"rules of thumb"* that serve these successful managers well:

1. Give credit and take blame rather than taking credit and giving blame.
2. Know when it is an "I" and when it is a "we" problem.

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Relational Rule of Thumb #1

Give Credit—Take Blame

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The common narcissistic urge in most people is to gather glory when things go well and to spread blame when things go wrong. People within corporations and organizations often build up years of resentment based on these behaviors.

People have an innate need to be recognized for their contributions and to be approached diplomatically and gracefully when they make mistakes. It is only the secure and confident manager that can sincerely accept responsibility when communication fails and processes falter.

Emotionally intelligent managers understand that their leadership styles in times of tension establish a pattern for the entire organization. The manager who accepts blame and distributes credit recognizes the crucial importance of a T.E.A.M. Dynamic to organizational success.

Motivation is quickly diffused when employees energetically contribute without receiving recognition or gratitude. This demotivating spiral quickly accelerates when the manager harbors credit for the efforts of others. Workplace history shows that such disingenuous and narcissistic behaviors erode relational trust and loyalty and increase conflict and resistance to cooperation.

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Relational Rule of Thumb #2

Know When It Is An "I" or a "We" Problem

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In potential and actual conflict situations, it is important to pay close attention to the subtleties of our speech. If there is a problem that is the result of our own making or negligence and we say to a co-worker, "*We've got a problem*", we're implying that the problem is equally of their making—and now they share responsibility to fix it. We will meet either outward or veiled resistance to this approach.

On the other hand, if there are equal and proportional contributions of negligence, then "*We've got a problem*," or "*I've got a problem*," is still a smart approach for the manager, as it infers a team approach and a willingness to help.

If the cause of the problem is squarely on the shoulders of the other person(s), the safest approach is, "*We've got to figure out a solution*." Some managers would say, "*You've got a problem*," which isolates the individual in a negative spotlight. It's like watching yourself do a belly flop in a slow-motion replay—a painful experience.

These small subtle steps in communication lead to great strides in creating a team dynamic within the organization. Employees feel assured that their mistakes will be quickly repaired because the focus is on "*fixing the problem, not placing the blame*." Cooperation and teamwork flourish in such an environment and it is the manager who sets this "we" tone in the organization.

It is also important to make sure that your tone and your body language communicate cooperation as well as your words. Insincerity with team-building phraseology is just as or more destructive than blaming and irresponsibility.

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The Humble Cognition

Emotionally intelligent managers possess an equal awareness of their personality's assets and liabilities. Each of the four personality styles...

- **Togetherness**
- **Enterpriser**
- **Analyzer**
- **Motivator**

...have **natural inclinations and features** that spell strength on one side and challenges on the other. Being cognitive of these personality liabilities makes each individual easier to work with and, consequently, more adept at resolving personality-based conflicts.

Following are the four personality styles with a description of their inherent liabilities that cause relational friction.

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Common Relational Liabilities

Togetherness Personality

- Procrastination
- Aversion to candor and straight-forwardness
- Oversensitivity
- Lack of assertiveness
- Overly serious
- Propensity for following the crowd
- Fearful of rocking the boat
- Need for constant affirmation
- People pleasing tendencies

Enterpriser Personality

- Bluntness / insensitivity
- Impatience
- Autocratic manner / condescending
- Lack of affirmative input
- Propensity for giving ultimatums
- Confrontational style
- Misguided competitiveness
- Poor listening skills
- Compulsion for quick completion
- Frustrated with risk-averse personalities
- Sarcasm

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Common Relational Liabilities

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Analyzer Personality

- Impersonal approach/appearance
- Values processes over people
- Resistance to change
- Pessimistic views
- Slow to change view
- Defensive
- Self-justifying
- Intellectual arrogance
- Propensity for criticizing and judging
- Tension and loss of composure under pressure

Motivator Personality

- Easily bored
- Impulsiveness
- Lack of follow-through
- Empty promises & shallow commitments
- Disorganization
- Flattery
- Aversion to confronting conflict
- Inappropriate speech/obnoxious behavior
- Dominating conversations
- Overzealous appetite for attention and recognition
- Persuasive manipulation to achieve objectives
- Lack of discipline and self-restraint
- Taking credit for the work of others

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Personality-Based Conflict Tendencies

Because of the four different personality styles, we see radically different responses to conflict. It is important for the manager to understand these tendencies in order to be able to wisely diffuse the tension. People often become angry with one another because of the way they react, not understanding that many such reactions are programmed into the "DNA" of the core-personality.

Some of the common conflict responses of the four personalities follow.

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Common Conflict Responses

The Togetherness Personality

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In conflict situations, Togetherness individuals are likely to:

- Avoid interpersonal aggression
- Become quiet
- Freeze up (*may flush with frustration*)
- Become emotional and/or defensive
- Express frustration and feelings to people other than the offending party
- Give in or feign agreement to avoid losing approval



It is important for advisers to be able to recognize the signs of escalating conflict or frustration with the Togetherness personality. They are often subtle in their method of disagreement and as a result, they are either overlooked or attempts are made to superficially placate them. Conflict is building when they begin to clam up, flush, display a lost or bewildered look in the eyes or respond in a defensive manner.

In conflict scenarios with Togetherness individuals:

- Inquire about their thoughts and feelings about the situation
- Demonstrate concern and respect with good listening skills
- Outline the necessary steps in resolving the conflict

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Common Conflict Responses

The Enterpriser Personality

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In conflict situations, Enterprisers are likely to:

- Take a direct, aggressive approach
- Rapidly escalate the level of confrontation
- Create win/lose outcomes if there is a lack of cooperation (*competitive*)
- Attempt to clear the air at one sitting
- Solve problems with more regard for closure than feelings
- Listen to creative input in order to solve problems



Because of their propensity for candor, Enterprisers will wrestle conflict head on. Some people appreciate their straightforwardness, while others find it offensive. Enterprisers often operate with a *"what you see is what you get"* mentality and abhor any pretense—especially in a conflict scenario.

This personality style is not afraid of hurting people's feelings if they feel the resolution is right. They are often heard saying, *"They'll get over it!"* in regard to emotional responses to their tactics. Because of their intense desire for closure, however, Enterprisers will listen to creative input that solves the issue and will quickly move to resolve issues rather than stew and harbor resentment.

In conflict scenarios with Enterprisers:

- Avoid arguments; listen to their complaints and ideas for resolution
- Ask for best ways to solve the conflict
- Own up quickly to any mistakes made; don't try to make excuses
- Be ready to put the situation behind and move forward

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Common Conflict Responses

The Analyzer Personality

In conflict situations, Analyzers are likely to:

- Increase resistance and shift into passive-aggressive behavior
- Overpower others with facts and logic
- Become defensive
- Withhold information
- Respond with "What if?" questions and "Prove that!" statements
- Judge adversary and the situation in black and white (*critical*) terms

Resolving a conflict with Analyzers is going to be a different experience altogether than with Enterprisers.

Whereas Enterprisers want quick resolutions, Analyzers want thorough resolutions. Analyzers examine all the events that led to the conflict, then carefully lay out the groundwork to prevent the scenario from recurring. They will not readily change their views without overwhelming evidence.

The Analyzers' first response in conflict will be defensiveness and they will quickly attempt to prove that they are right. Analyzers may withhold necessary input for solving the conflict or even refuse to participate at all in the resolution process.

In conflict scenarios with Analyzers:

- Do not force or push the resolution process; adopt a patient approach and move slowly and cautiously
- Avoid debate and blaming
- Take notes and ask for their critique of the problem and input in preventing future conflict

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Common Conflict Responses

The Motivator Personality

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In conflict situations, Motivators are likely to:

- Avoid the scene when they sense negativity
- Try to dismiss or smooth over the situation (*adapt a superficial fix*)
- Become emotional and offensive—take criticism or conflicts personally
- Seek control or revenge by persuading others to side with them
- Openly joke about or trivialize the conflict (*while being internally upset*)
- Overwhelm their opponent with monologue



The Motivator personality is quite uncomfortable in confronting conflicts, which goes against the grain of their "*take-life-in-stride*" nature. Motivators are good at rallying people to their cause and trying to win by virtue of a majority. They are also inclined to use superficial fixes by making light of situations in order to quickly restore an air of amicability.

Motivators avoid people whose tone communicates anger, frustration and impatience. Criticism is often taken as a threat to their image and they may respond by attacking the adversary or venting their frustrations. Motivators may also act as if the problem is solved when there is still an undercurrent of conflict, in hopes that it will pass.

In conflict scenarios with Motivators:

- Approach in a friendly and positive fashion
- Use self-deprecating humor to ease the tension
- Frame a "*we*" approach to the conflict instead of and "*I*" or "*you*"
- Ask for their thoughts and ideas for resolution—and listen without interruption

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Directions: Choose the common conflict response for each of the four personality styles.

29a***Conflict Responses***

1. In conflict situations, the common conflict response of the _____ personality style is to overwhelm their opponents with monologue.

 Togetherness
 Enterpriser
 Analyzer
 Motivator
2. In conflict situations, the common conflict response of the _____ personality is to judge their adversaries and situations in black and white terms.

 Togetherness
 Enterpriser
 Analyzer
 Motivator
3. In conflict situations, the common conflict response of the _____ personality style is to feign agreement in order to avoid losing approval.

 Togetherness
 Enterpriser
 Analyzer
 Motivator
4. In conflict situations, the common conflict response of the _____ personality style is to attempt to clear the air at one sitting.

 Togetherness
 Enterpriser
 Analyzer
 Motivator

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Identifying Sources of Interpersonal Stress & Conflict

Much of the personality-based conflict we encounter with clients and co-workers can be avoided simply by being aware of the motivators and de-motivators of each personality. Interpersonal stress and conflict arise when we consistently communicate or behave toward others in a manner that goes against their natural comfort zones.

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In the following pages, we will identify the factors that motivate each personality (*create a level of comfort and enthusiasm*), as well as the factors that de-motivate (*create a level of discomfort and stress*).

Here we offer an outline of the four leading personality patterns. We will combine these factors along with conflict responses and communication adjustments in a tool you may wish to print out entitled, "*The Personality Management Blueprint*." This blueprint is available at the end of the course.

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Source of Interpersonal Stress & Conflict



The Togetherness-Dominant Personality

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<i>Stressors</i>	<i>Motivators</i>
<ul style="list-style-type: none"> • Dealing with change • Having to be candid, aggressive or assertive • Being singled out publicly • Having to lead • Making autonomous decisions • Completing complex tasks without feedback • Not being appreciated • Lack of time—because they have trouble saying "no" 	<ul style="list-style-type: none"> • Providing support to others • Working cooperatively with others • Thorough yet concise explanations • Receiving verbal or written recognition • Dealing with likable and considerate individuals • Low pressure, non-competitive environment • Being consulted in planning stages (<i>team approach</i>) • Specific steps and clear time-frames

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Source of Interpersonal Stress & Conflict



The Enterpriser-Dominant Personality

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<i>Stressors</i>	<i>Motivators</i>
<ul style="list-style-type: none"> • Being in a predictable and monotonous circumstance • Listening to detail • Dealing with red tape • Waiting for change / waiting on decisions • Others withholding true thoughts or feelings • Being dominated or controlled (<i>appearing soft or weak</i>) • Beating around the bush (<i>lack of candor</i>) • Projects not being finished • Working with overly cautious, procrastinating people 	<ul style="list-style-type: none"> • Having control over situations • Atmosphere where candor is encouraged • Working with creative individuals • Working with pragmatists • Deadlines and pressure situations • Being autonomous— not having to depend on others • Being in a leadership position • Improbabilities, extreme odds and challenges to the ego

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Source of Interpersonal Stress & Conflict



The Analyzer-Dominant Personality

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<i>Stressors</i>	<i>Motivators</i>
<ul style="list-style-type: none"> • Oversimplification • Being pulled off-task • Listening to multiple inputs • Working with impulsiveness • Having to persuade or sell others • Having to stretch routines • Having other people not follow through with tasks • Being held responsible for others' work or mistakes • Being questioned about quality of work or performance • Having to make subjective, personal responses • Dealing with time-related pressure • Working with random, unfocused and unpredictable personalities 	<ul style="list-style-type: none"> • Being right • Approaching tasks logically and systematically • Going at their own pace • Being in control of their performance factors • Being in thought-provoking conversations • Working with those who stay on track • Working with people whose standards are high (<i>quality-conscious</i>)

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Source of Interpersonal Stress & Conflict



The Motivator-Dominant Personality

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<i>Stressors</i>	<i>Motivators</i>
<ul style="list-style-type: none"> • Dealing with detail • Listening to slow, monotonous presentations • Overly serious approaches • Negative and critical conversations • Pessimistic people and surroundings • Repetitive and inflexible surroundings • Working alone • Complexity • Not being recognized • Long, drawn-out processes • Having to follow through to the end of a task 	<ul style="list-style-type: none"> • Opportunities to talk • Having the spotlight • Opportunities to convince and persuade • Social environment • Playful approach • New challenges • Incentives for achievement • Competing with others/inspiring others • Frequent change • Optimism

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Interpreting Stressors & Motivators

If you or your client has one dominant personality style, then the preceding charts will apply specifically to handling stressors and motivators. If you or your client have two dominant styles such as the four following illustrations: (E/M), (T/M), (E/A), (T/A), then you will want to reference the stressors and motivators for both dominant personality styles to accurately relate to that client.

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Changing a Negative Climate

Far too often when individuals face conflict, they fall victim to what brain science refers to as the Amygdala hijack. This is where the anger center of the brain overwhelms our logic and we meet negative behavior with negative responses, thereby escalating the conflict. The emotionally competent adviser or agent chooses the responses that will serve to diffuse the conflict.

Following is a chart of common negative behaviors, the underlying need and a prescribed emotionally intelligent response.

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Changing a Negative Climate

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<i>Negative Climate</i>	<i>Prescribed Response</i>	<i>Example of Response</i>
<i>Arrogance</i>	Give strokes.	"You're right. I see what you are saying."
<i>Attacking</i>	Calmly take ownership of the problem.	"What would be the best way to improve this situation?"
<i>Confusion</i>	Listen and take note of details.	"Let me take some notes here on how to resolve this situation."
<i>Curtness</i>	Use candor and sincerity.	"I'm not going to promise what I can't deliver. You'll be the ultimate judge of my performance."
<i>Cynicism</i>	Accept input and take servicing approach.	"I can see why you're saying that. How would you like me to help?"
<i>Defensiveness</i>	Give realistic expectations.	"So we can avoid any disappointment or misconceptions, I'm going to paint a realistic picture of what might and might not happen."
<i>Demands</i>	Provide facts.	"Let me pull out some data on this topic."
<i>Disorganized Presentation of Ideas</i>	Use leading questions.	"Let me ask you a series of questions that are designed to ensure that our services match your needs."
<i>Evasiveness</i>	Be empathetic and come up with a simple game plan.	"I would be frustrated too in your circumstance. To resolve it, how about if we do the following?"
<i>Frustration</i>	Write down reflective statement and proposed direction.	"Let me get this down. You want me to first... then put together a plan that will do the following..."
<i>Impatience</i>	Provide guidance with brevity and clarity.	"Here's a clear and simple way to resolve these issues."
<i>Oversensitivity/Volatile Temperament</i>	Give immediate plan of action.	"Today, I'm going to do... and call you to confirm it. Then, I will do... and immediately confirm that in a letter."
<i>Skepticism</i>	Lead by asking permission; do not give orders.	"So would you like me to do A, B and C, or just A? All right, with your OK, I'll get started on that."

*Struggle
for Words*

Organize thoughts
and create a plan.

*"Let's make a plan of action
here and define the steps
each of us needs to take."*

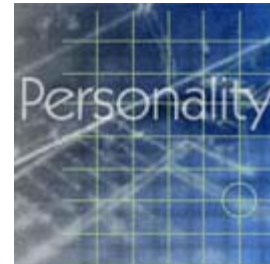
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Personality Management Blueprint

In the **Communications Dynamics Courses II and III**, we have covered:

- Communication Adjustments
- Conflict Responses
- Personality Stressors
- Personality Motivators



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In the following **Personality Management Blueprint**, we have summarized the information on one page view per personality. A short review of these blueprints before a client meeting can help you get into the proper relational frame of mind, which will dramatically decrease miscommunication and conflicts.

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Personality Management Blueprint

<i>The Togetherness Personality</i>	
<p><i>Effective Approach Techniques</i></p> <ol style="list-style-type: none"> 1. Present project in a step-by-step process. 2. Implement change over time versus overnight. 3. Ask them for input and listen to their comments. 4. Recognize their achievements. 5. Be tactful and sensitive to their feelings. 	<p><i>Conflict Management</i></p> <ol style="list-style-type: none"> 1. Inquiring about their thoughts and feelings in the situation. 2. Demonstrating concern and respect with good listening skills. 3. Outlining the necessary steps for resolving the conflict.
<p><i>Motivators</i></p> <ol style="list-style-type: none"> 1. Providing support to others. 2. Working cooperatively with others. 3. Thorough yet concise explanations. 4. Receiving verbal or written recognition. 5. Dealing with likable and considerate individuals. 6. Low pressure, non-competitive environment. 7. Being consulted in planning stages (<i>team approach</i>). 8. Specific steps and clear time frames. 	<p><i>Stressors</i></p> <ol style="list-style-type: none"> 1. Dealing with change. 2. Having to be candid, aggressive or assertive. 3. Being singled out publicly. 4. Having to lead. 5. Making autonomous decisions. 6. Completing complex tasks without feedback. 7. Not being appreciated. 8. Lack of time—because they have trouble saying "no".

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Personality Management Blueprint

<i>The Analyzer Personality</i>	
<p style="text-align: center;"><i>Effective Approach Techniques</i></p> <ol style="list-style-type: none"> 1. Present detailed ideas on paper in an organized manner. 2. Allow time for them to make a decision. 3. Be willing to discuss all of the positions. 4. Be sensitive to their high standards. 5. Allow them to plan details. 	<p style="text-align: center;"><i>Conflict Management</i></p> <ol style="list-style-type: none"> 1. Not forcing or pushing the resolution process (<i>adopt a patient approach and move slowly and cautiously</i>). 2. Avoiding debate and blaming. 3. Taking notes and asking for their critique of the problem and input in preventing future conflict.
<p style="text-align: center;"><i>Motivators</i></p> <ol style="list-style-type: none"> 1. Being right. 2. Approaching tasks logically and systematically. 3. Going at their own pace. 4. Being in control of their performance factors. 5. Being in thought-provoking conversations. 6. Working with those who stay on track. 7. Working with people whose standards are high (<i>quality conscious</i>). 8. Predictable processes. 	<p style="text-align: center;"><i>Stressors</i></p> <ol style="list-style-type: none"> 1. Oversimplification. 2. Being pulled off-task. 3. Listening to multiple inputs. 4. Working with impulsiveness. 5. Having to persuade or sell others. 6. Having to stretch routines. 7. Having other people not follow through. 8. Being held responsible for others' work or mistakes. 9. Being questioned about quality of work or performance. 10. Having to make subjective, personal responses.

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9. Producing high-quality solutions.	11. Dealing with time-related pressure.
10. Having the information they need to make a decision.	12. Working with random, unfocused and unpredictable personalities.

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Personality Management Blueprint

<i>The Motivator Personality</i>	
<p style="text-align: center;"><i>Effective Approach Techniques</i></p> <ol style="list-style-type: none"> 1. Present a fun, positive and enthusiastic attitude. 2. Appreciate their need for attention and recognition. 3. Be flexible with time. 4. Paint a picture when communicating. 5. Avoid assigning them detailed tasks. 	<p style="text-align: center;"><i>Conflict Management</i></p> <ol style="list-style-type: none"> 1. Approaching in a friendly and positive fashion. 2. Using self-deprecating humor to ease tension. 3. Framing a "we" approach to the conflict instead of an "I" or "you" approach. 4. Asking for their thoughts and ideas for resolution—and listening without interruption.
<p style="text-align: center;"><i>Motivators</i></p> <ol style="list-style-type: none"> 1. Opportunities to talk. 2. Having the spotlight. 3. Opportunities to convince and persuade. 4. Social environment. 5. Playful approach. 6. New challenges. 7. Incentives for achievement. 8. Competing with others/inspiring others. 9. Frequent change. 10. Optimism. 	<p style="text-align: center;"><i>Stressors</i></p> <ol style="list-style-type: none"> 1. Dealing with detail. 2. Listening to slow, monotonous presentations. 3. Overly serious approaches. 4. Negative and critical conversations. 5. Pessimistic people and surroundings. 6. Repetitive and inflexible surroundings. 7. Working alone. 8. Complexity. 9. Not being recognized. 10. Long, drawn-out processes. 11. Having to follow through to the

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end of a task.

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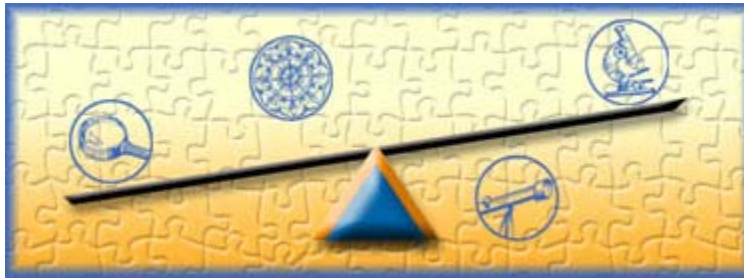
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Engaging Clients in the Personality Dialogue

In relationship to the **personality-based dialogue** found in the Communication Dynamics courses, advisers fall into three categories:

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1. **Profile certain clients** with the T.E.A.M. Dynamics Personality Awareness Profile and enter into the personality dialogue as a part of the trust and relationship-building strategy.
2. **Process the Client Conversation Profile** after the client leaves and apply the personality management strategies in future communication.
3. **Apply these personality assessments and adjustments** on an intuitive level during client meetings.



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Applying T.E.A.M. Dynamics Reports to Your Business

T.E.A.M. Dynamics Reports are available for your practice management, including the following specific reports:

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- **Hiring & Interviewing:** Strengths & Challenges; Stressors & Motivators; On-the-Job Narrative
- **Managing & Team Building:** Team Roles; Communication Adjustments; Strengths & Challenges; Stressors & Motivators
- **Selling Adjustments:** Adjustments to Make for the Sale; Discovery, Presentation & Service Keys; Financial Planning Adjustments

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**T.E.A.M. COURSE 3:
 Managing Diverse Personalities
 & Personality-Based Conflict**

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Action Assignment

1. **Complete the Final Exam** and go over the results with your General Agent/Trainer.
2. **Review Page 41, "Engaging Clients in the Personality Dialogue"** and Page 42, **"Applying Team Dynamics Reports to Your Business"**.
3. **After reviewing both**, make a decision on how you are going to make T.E.A.M. a part of your future work with clients and prospects. Discuss this with your General Agent/Trainer.

Please print this Action Assignment using the "Printer Friendly" button at the top of this page. Once it is complete, sign it and submit it to your General Agent for his or her signature. Give one signed copy to the General Agent and fax/send another copy to Field Development Operations at the corporate headquarters — (513) 794-4515.

***T.E.A.M. COURSE III:
 Managing Diverse Personalities
 & Personality-Based Conflict***

Action Assignment Satisfactorily Completed

DATE: _____

SIGN OFF

General Agent: _____

Sales Associate: _____

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OHIO NATIONAL T.E.A.M. DYNAMICS
Final T.E.A.M. Exam

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Exam Request

If you are interested in completing the exam to receive a **Certificate of Completion**, please [click here](#), fill out the information requested on the next screen, and submit the form to us. We will reply with a link to the exam. ***Passing this exam is required for VIP Eligible and Developing Career/Corporate Advisers with less than two years experience when contracted.***

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Once you receive the exam link, follow the directions. Upon completion of the exam, print it out and fax it to TEAM Scoring at 1-866-671-0035. Once it is processed, we will notify you of your score and send you a Certificate of Completion by mail.

This certification is provided free by Ohio National to our Sales Associates.

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Company:	<input type="text"/>		
GA:	<input type="text"/>		
Address:	<input type="text"/>		
City:	<input type="text"/>		
State:	<input type="text"/>	Zip:	<input type="text"/>
		Phone:	<input type="text"/>
E-Mail:	<input type="text"/>		

If you have not yet registered for the free trial software, [click here](#) to do it now.

If you have already registered for your free software trial, and want to purchase the software, [click here](#). Be sure to have your T.E.A.M. Course username and password handy so you can log in.

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**UNIT VIII: T.E.A.M. DYNAMICS
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Your feedback is important to us. Please answer the questions below as completely as you can.

Question 1: What do you think about the online method of learning?

Question 2: What did you like most about online learning?

Question 3: What did you like least about online learning?

Question 4: Would you recommend online study to others? Why or why not?

Question 5: Were you able to navigate the program smoothly?

Question 6: Did the side bar links work properly?

Question 7: What do you think of the program design?

Question 8: Do you have any additional comments or suggestions?

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AFFIDAVIT OF PERSONAL RESPONSIBILITY To Be Signed by Student

I declare that I personally completed this exam without any outside assistance, including course material, other source material, or assistance from any person(s).

Signature (*Sign in ink only.*)

Date

AFFIDAVIT OF EXAM COMPLETION To Be Completed & Signed by Exam Monitor

I declare that I personally observed the above-named individual during the completion of this examination, and also observed that the producer received no outside assistance in completing the examination.

Name of Student

T.E.A.M. Dynamics Communication Skills Courses
Name of Course

Address Where Exam Was Taken

Exam Date

Start Time

End Time

Type of Monitor

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Test Administrator (*Please print.*)

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