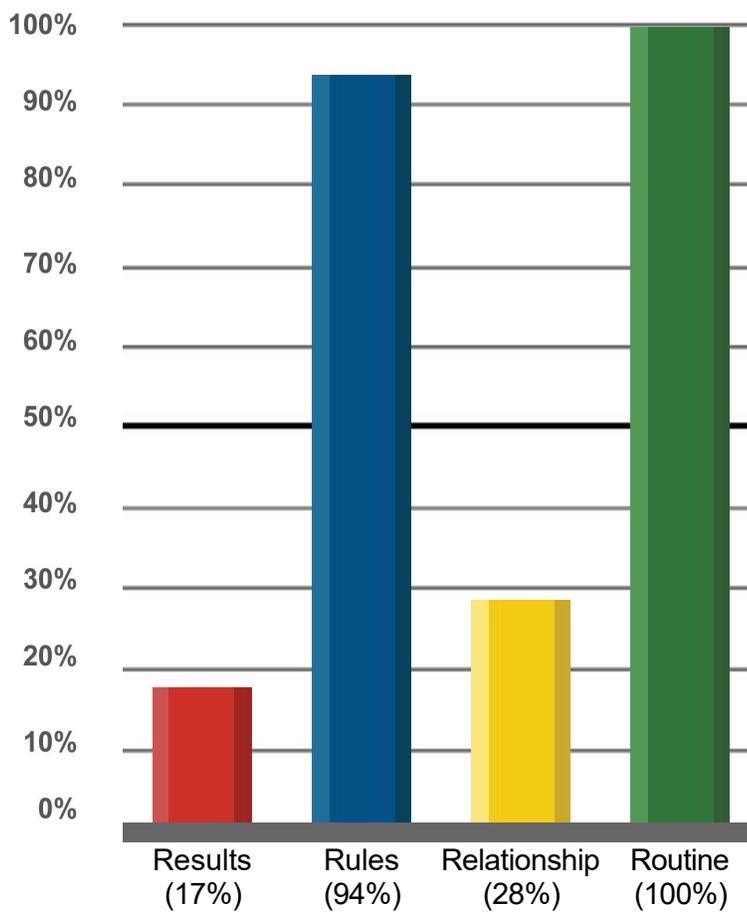




Producer Insights™ Report for: ABC Financial Advisors

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Jill's Profile Graph



RESULTS	RULES	RELATIONSHIPS	ROUTINE
Decisive Responsive Competitive Strong Willed Ambitious Determined	Balanced Judgment Accurate Neat Careful Tactful Systematic	Sociable Optimistic Convincing Warm Enthusiastic Magnetic	Stable Steady Relaxed Consistent Patient Resistant to Change

ROUTINE (100%)

RULES (94%)

being a provider to those close to them will be important to this group.

Decision Making

Jill may have difficulty establishing priorities and making decisions. Show her what is "normal" for someone in her situation.

Spreadsheets - Present the facts and the numbers when making your points. Charm and fun will not work well as this style tends to be unemotional when making decisions. Stick to the facts and know your stuff.

Delivering "The News"

Jill prefers to have the facts laid out. Bad news, however, can make her fearful and have a paralyzing effect, so be very gentle and find ways to maintain consistency.

Stay Factual - Jill will most likely want a "just" outcome, so stay focused and unemotional. You may not get a second chance if you make a mistake or neglect to deliver on a commitment.

Tone

Speak Slowly & Softly - Jill will appreciate you taking time to provide thorough explanations.

Take a soft, slow tone. Stay factual and demonstrate your established policies and procedures for working together.

Pace

Very Slow - Do not push your agenda.

Very slow and methodical.

What to Avoid

Pressure or push tactics - This will disengage Jill quickly and cause her to not want to do business with you.

Pressure or push tactics - Jill will most likely be turned off and see through a hard-sell tactic or an artificial timeline.

Assigning Homework

Give a list of things you need and help Jill understand that you need the information to provide her with the best possible future outcome.

Consider Relevancy - Only ask for relevant information as Jill will not part with personal information easily. Ensure that the process is clear and then follow an established timeline. Once you are a trusted advisor, Jill typically has all the information you could need at her fingertips.

NOTES



