DISCStyles

FACILITATOR GUIDE

DISCStyles

DISCStyles Leader's Guide

Table of Contents

GUIDELINES AND SUGGESTIONS

Centuries ago, Confucius said, "I see and I forget, I hear and I remember, I do and I understand."

This great philosopher's thoughts are still very relevant today. Studies from industry and education have shown that learning through participation is far more effective than passive learning. Management consultants Les Donaldson and Edward Scannell have estimated that people remember 5–10% of what they see, 30–50% of what they see and hear, 50–70% of what they say, and 70–90% of what they say and do.

A facilitator's (leader's) purpose is to help individual participants improve their effectiveness, whether the program is in sales techniques, management skills, specific job skills, or self-development. Therefore, it is the facilitator's responsibility to encourage active participation from group members—not only intellectually, but emotionally as well. When intellect and feeling are both stimulated, a participant's learning is more likely to have lasting effects.

As facilitators, it is important to remember that for adults, learning is often a rediscovery process. This process experienced by a learner is more important than any fact that may be presented.

Off to a Great Start...

Making everyone feel as comfortable and at ease as quickly as possible is a big responsibility for all facilitators. The sooner this is accomplished, the more each participant will gain from the workshop.

Simple introductions, beginning with you, are a good first step. Each brief introduction might include the participants' expectations of the workshop, which you then list on a flipchart sheet. This list of expectations can be posted and used as a part of the workshop's conclusion. An icebreaker activity might also be used to relax the group and to begin an easy flow of participation.

One resource for icebreakers is *The Encyclopedia of Icebreakers: Structured Activities that Warm Up, Motivate, Challenge, Acquaint and Energize*, originally published by Jossey-Bass Pfeiffer.

As a facilitator, you will face a variety of situations. Listed here are some things you can do to handle these situations effectively:

- Accept incomplete ideas from participants and ask for clarification and expansion.
- If possible, relate one participant's comment or idea to others. This helps provide structure and direction to the discussion.
- Point out when the discussion has drifted off the topic. It may be helpful in some cases to restate the original topic of discussion to get things back on track.

- Within the allotted time, it may not be possible to solve all the problems or address all the issues that surface during discussions. Therefore, do not hesitate to point out when it may be useful to move on, even if it has not been resolved. In this case, suggest a procedure or strategy for solving the problem or addressing the issue at a specified later date.

- Use the listening skills taught in this workshop to deal with disagreements and controversies. Doing this will not only handle the situations effectively, it will model the use of the skills for the participants.

Just as there are things you can do as a facilitator to enhance the effectiveness of the training, there are also things you can do that will court disaster:

- Avoid judging or criticizing the ideas, beliefs, assumptions, values, or attitudes of the participants. Also, attempt to keep the participants from judging or criticizing one another because that will stifle meaningful discussion.

- Limit lengthy comments and/or summaries. The more you say, the less impact and value it will have.

Remember, the facilitator's role is not an opportunity to showcase yourself. Rather, it is your responsibility to ensure that participants are exposed to the material, discuss it from their own perspectives, and gain an understanding and appreciation of how to utilize this material in their lives.

Suggested Room Set-Up

Choose a well-lighted, well-ventilated, quiet room. Be sure that the chairs are comfortable and that the participants have writing surfaces. Although this workshop is designed to be used with any size group, the ideal group size is between 15 and 25.

When arranging tables and/or chairs, be sure that every participant will have a clear view of you, the video screen, your flipchart, and other visual aids you may choose to use.

Handling Late Arrivals

Plans for handling late arrivals should be made in advance. When someone does arrive at the session late, you will then be able to handle it easily with little interruption to the flow of the session.

You may want to ask participants to leave the chairs closest to the door empty. You may also want to post any flipchart sheets you have written on a side wall so that latecomers can see what they have missed. Whatever you do to accommodate latecomers should cause little distraction for those who were on time, yet still give the latecomers a good opportunity to catch up.

Problem Participants

In a number of instances, a participant may become a "problem": Discussion may be monopolized, side conversations may be continuously initiated, and so on. Without causing the participant any great embarrassment, it is a good idea to identify the unsatisfactory behavior, define the effects of the behavior, and recommend some alternative behavior. For example: "Lee, your talking with Chris distracts the rest of us. How about holding those discussions in the hallway or during our next break? Thank you."

Conclusion

When bringing a session or workshop to a close, facilitators generally find it meaningful to summarize the workshop's central points and activities. The summary should be given by the participants with occasional input by the facilitator. Time for summation has been built into every session in this program. Points offered as a part of the summary by the participants should be written on the flipchart so that the group can see what it has accomplished and learned.

In addition, review the list of the participants' expectations that was created during the opening introductions. Were these expectations met? If not, a good mini-discussion item would be: What can the participant(s) do to meet those expectations?

A facilitator's primary goal in any program is to help individuals become more effective in what they do. To be more effective, remember the thoughts of the wise Confucius: What they only see, they may forget; whatever they hear, they may remember; but what they do will help them to understand and will lead to their greater effectiveness!

Experience shows that anything left to chance will have just that kind of result... chance! To help you work toward your intended results, the next section is an extensive planning checklist. Following the checklist will ensure that you will not have embarrassing moments because of an oversight. Blank spaces in the checklist have been provided so that you can make note of additional ideas that come to mind.

PLANNING MAKES PERFECT

Several Weeks Prior to Training Date…

- Select date(s) for the program's presentation.

- Choose and reserve the facilities.

- Distribute flyers or other notices to potential participants with the following information:

  – Purpose and objectives of the workshop
  – Date(s)
  – Time(s)
  – Location
  – Registration information
  – Registration deadline

- Order sufficient materials from HRD Press, Inc., 1-800-822-2801 or www.hrdpress.com

- List the equipment you will need and submit requests to the appropriate departments. Be sure to include the following:

  – Correct equipment to play the video chapters
  – Extension cord
  – Flipchart pad and stand
  – _____

  – _____

Two Weeks Prior to Training Date…

- Distribute the online DISC assessment to each participant. Make sure you set the "View Reports" field to "NO" so that you can personally print out each participant's _DISC Online Assessment Report_ and bring it with you to the workshop to hand out to each participant at the appropriate time. If you want the participants to be able to view and/or print out their reports immediately after taking the assessment, check the "YES" option for "View Reports" in your online assessment system.

One Week Prior to Training Date…

- Thoroughly review and prepare program material.

- Print out and bind/staple reports for each participant one day prior to the workshop.

- Students should print out their own workbook any time prior to the workshop.

- Review all video chapters at least twice.

- Review participant materials.

- Begin to rehearse the program's presentation.

- Anticipate participant questions and prepare responses.

- Prepare whatever visuals or slides you may want to use.

- Prepare a complete list of participants and make copies to distribute at the workshop.

- Ensure that all needed supplies are ready, including any/all of the following:
  - Flipchart
  - Wide felt-tipped pens in several colors
  - Masking tape
  - An abundant supply of pencils/pens
  - Notepads
  - Program evaluation forms

- Check the facilities that have been reserved to ensure that an adequate number of chairs and tables will be made available.

- Order refreshments, if appropriate.

- _____

- _____

One Day Prior to Training Date…

- Prepare name tents or name tags.

- Prepare a "Welcome" sign on the first sheet of the flipchart by writing:

Welcome to the
Self-Awareness
Communication
Skills Training!

- If the room is available, prepare the room for the next day's workshop as follows:
    - Arrange chairs and tables appropriately.
    - Set up video equipment where it can be comfortably viewed by all participants.
    - Play video to be sure that the equipment is operating.
    - Position the flipchart where all participants can see it.
    - Put a notepad, a participant roster, and a copy of the Participant eWorkbook at each participant place at the table.

- Check your presentation preparation—it should be well rehearsed.

- Ensure that the facilitator's materials have been assembled, including the following:
    - Leader's Guide
    - The *DISC Platinum Rule* video set to the title at the beginning of the video
    - Equipment for showing the video chapters with a monitor
    - Flipchart paper and easel
    - Wide felt-tipped markers in assorted colors
    - Masking tape
    - A copy of the program evaluation form for each participant

One Hour Prior to Start Time...

- Ensure that a Participant eWorkbook, a notepad, and a participant roster are at each place.

- Arrange name tents and name tags alphabetically on a table at the room's entrance so that each participant can find and take his or her own.

- _____

- _____

- Have a GREAT workshop! You're prepared!

At the End of the Workshop...

- Collect all program evaluation forms.

ABOUT THIS LEADER'S GUIDE

Orientation

The opening pages of this Leader's Guide provide you with an overview of each program option—the half-day (4 hours) and the full-day (7.5 hours) as well as preliminary information you will need.

Following these pages are *The DISC Platinum Rule* Presentation Outlines for both options. The outline is in three columns: Activity, Full-Day, and Half-Day.

1. The Activity column tells you at a glance what is next in the presentation.

2. The program outline shows the time for presentations and activities given in a full-day session, and gives the page number in the Leader's Guide containing the information the facilitator needs to conduct the activity or presentation.

3. Although guidelines or "scripts" for conducting activities and/or presentations are provided, you still must prepare for the session in advance! Don't expect to just wing it and get great results. You will want to customize the script by including your own stories and examples or making key points that are particularly relevant to your participants.

Preparing for This Session

In order to conduct this program successfully, you'll need to spend some time preparing. Experienced facilitators find that this preparation works best when completed over time—this allows you to absorb the material rather than try to cram at the last minute. By following the recommended steps, your training will have the polish it needs to really make a difference with your participants!

Step 1. Note the pre-program assignment! Make sure that the participants have their assignments (the *DISC Online Assessment Report)* at least two weeks before the program.

Step 2. One week before the training, review all of the materials—the Leader's Guide, the Participant eWorkbook, the *DISC Online Assessment Report,* and *The DISC Platinum Rule* video chapters. The video chapters are embedded in the PowerPoint slides, and will appear as a large black box on the slide. However, when you move the mouse, a ribbon with the PLAY icon will appear. Press play and the video will begin.

Do not make notes in the documents yet or attempt to memorize anything. At this point, your purpose is to get a sense of the flow—what you'll be doing and what the participants will be doing. Try to visualize leading the session successfully, as the participants interact and enjoy themselves, learning valuable new ways to communicate effectively with others. After this review, put the program aside for a few days and just let the content settle in your mind.

Step 3. Now it's time to get serious. Review your materials carefully this time, making notes in your Leader's Guide.

Customize the program for your particular participants. Think about some personal stories you might want to recount to enliven the program; think about places in the program when you might ask participants for their stories.

Review your "choreography" for the session. Where will the video equipment be set up? Will you use one flipchart or two? Are there any additional materials you'll want to use in the session that aren't included in the package?

Step 4. One day before the training, practice the session in the room you'll use. Go through all the actions and practice saying the words. Get comfortable with the choreography. Where will you put your flipcharts and your video equipment? Is the video cued to start at the appropriate place?

Review the checklist entitled "Planning Makes Perfect." It includes a list of everything you will need. Do you have everything? The checklist also is a list of the required actions needed to prepare for the workshop. Have these been completed?

Are copies of the Participant eWorkbook ready to set at each place? Did you prepare a copy of the participant roster for each participant? Did you make any flipchart pages that you want to have prepared in advance? Do you have a good supply of markers, masking tape, and other supplies for using and posting flipchart pages?

Step 5. On the day of the session, get into the room at least one hour before the participants are scheduled to arrive. Just being in the room will help to increase your comfort with the place and the task.

If convenient, have some type of music playing so attendees don't enter a "dead" room.

Go over your materials and checklist again. Verify that everything is done: Participant eWorkbooks are set at each place, the arrangement of the room suits you, and your Leader's Guide is annotated and ready for use.

Test everything. Run a few minutes of video and check the volume. Remember, the presence of others in the room will absorb some of the sound, so you will want the volume to be somewhat loud to you in the room alone. Mark all of your prepared flipcharts with masking tape so that you can find them effortlessly when you need them.

Once you have double-checked everything, you can relax. As participants arrive, greet them individually and learn their names. This will help during the session. Find out where everyone is from and what their job responsibilities are. Little facts like this often help you to identify someone who has some relevant experience or who might be able to help you prove a point.

Conducting the Session

Relax and move through the program as planned. Remember that your Leader's Guide is there for you to refer to and use.

Give yourself permission to forget a point occasionally and return to it later. While conducting the training as designed is important, chances are that participants will not notice minor deviations in the sequence. Enjoy presenting the program knowing that the participants will appreciate the material you are providing.

Good luck!

PROGRAM OVERVIEW

Activity	Approximate Time
1. Welcome and Program Introduction	6 min. (p. 15)
2. Participant Introductions	10 min. (p. 17)
3. Slide 4: Video Chapter 1—DISC Platinum Rule Introduction Group Discussion	8 min. (p. 17) 5 min.
4. Independent Activity: "A Day at the Office"	20 min. (p. 18)
5. Slides 5 and 6: Video Chapters 2 and 3—Verbal, Vocal, and Visional Behaviors; Open vs. Guarded Behaviors Group Discussion	12.5 (p. 19) 7 min.
6. Independent Activity: "Openness in People You Know"	20 min. (p. 21)
7. BREAK	**15 minutes**
8. Slide 8: Video Chapter 4—Direct vs. Indirect Behaviors Group Discussion	6 min. (p. 21) 7 min.
9. Independent Activity: "Directness in People You Know"	10 min. (p. 23)
10. Slide 10: Video Chapter 5—Introduction to the Four Behavioral Styles	11 min. (p. 24)
11. LUNCH BREAK	**60 minutes**
12. Distribution of DISC Online Assessment Report	7 min. (p. 25)
13. Review of the Four DISC Styles	50 min. (p. 27)
14. Verbal, Vocal, and Visual Indicators Group Discussion	5–18 min. (p. 29) 10 min.
15. Group Activity: "The Mixer"	20 min. (p. 31)
16. Activity: "Styles of the Famous"	30 min. (p. 31)
17. BREAK	**15 minutes**
18. Adaptability Group Discussion	20–25 min. (p. 35) 10 min.

Activity	Approximate Time
19. **OPTIONAL:** Summary Activity: "A Day in the Life"	35–45 min. (p. 38)
20. Evaluation and Closing	5 min. (p. 40)
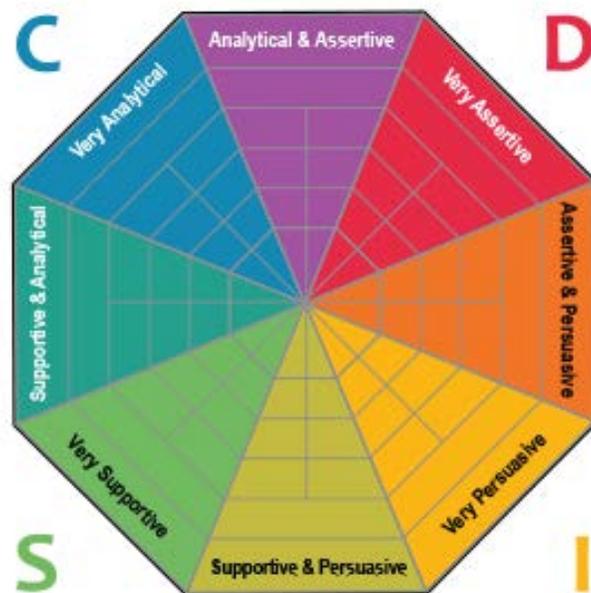
DISCstyles Workshop

7.5 hours

1. Welcome and Program Introduction   6 minutes

DO: Welcome participants to *The DISC Platinum Rule.*
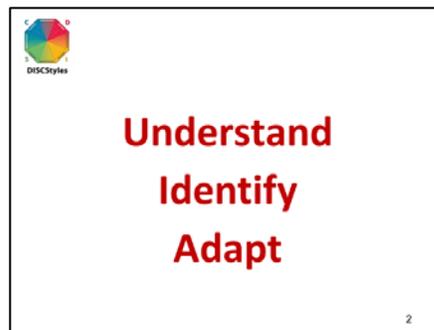
Introduce yourself.

SHOW: Display Slide 1: *The DISC Platinum Rule.*

TELL: Begin the program by telling participants:

- This is a program that will show you how to "Treat others the way they want and need to be treated."

SHOW: Display Slide 2 and explain the terms shown on the slide.

TELL: • In this course, you will learn to:

1) *Understand* that many behaviors can be positioned within a systematic, predictable framework, even though each individual's personality is as unique as his or her thumbprint.

2) *Identify* how a person's behavioral patterns influence:

   - What that person wants, needs, and expects from you and others

   - How that person communicates those wants, needs, and expectations

3) *Adapt* to people in a way that will reduce tension and increase cooperation and trust in all types of relationships.

- Today's program has three components:
  1) Video Chapters
  2) Activities
  3) Participant Workbook

- **OPTIONAL:** The program is video-based, which means that we will view a chapter of the video, stop the video, and process the new information by means of some appropriate activity.

- There are numerous chapters built into this program to help you review, organize, and assimilate the information.

SHOW: Show Slide 3, *Objectives.*
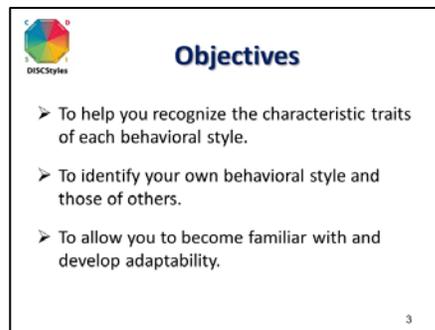
TELL:
- This brings us to the specific objectives of this course, which are:
  1) To help you recognize the characteristic traits of each behavioral style.
  2) To identify your own behavioral style and those of others.
  3) To allow you to become familiar with and develop adaptability.

- Today's session will last about 4 hours, including one 15-minute break.

- Your *active participation* in the discussions and activities during this program is the key to both a greater understanding of relationships and to your total enjoyment of the program.

- *Active participation* means:
  1) Asking questions when you aren't clear about something.
  2) Taking an active part in all of the activities.

DO: Cover "housekeeping" details, such as the locations of the restrooms, refreshments, and so on. Ask participants to please turn off all cell phones.

2. Participant Introductions   10 minutes

DO: Have participants introduce themselves, including their:

- Name
- Organization or department
- Job responsibilities
- Expectations (what they hope to gain from today's session)

NOTE: Write participants' expectations in abbreviated form on a flipchart under the heading EXPECTATIONS. When all of the participants have spoken, post the list of expectations in a visible location.

Example:

3. SLIDE 4: Video Chapter 1   8 minutes

NOTE: The video chapters you will use in this section are embedded in the PowerPoint slide show. When you look at the slide, the screen will appear as light gray or black. However, when you move your mouse over the bottom of the screen, a ribbon will appear with the PLAY icon at the left. Click on the play icon to play the video.

TELL:
- We're going to begin this session with the first of 32 video chapters. In this first chapter, Dr. Tony Alessandra explains the *DISC Platinum Rule*—a twist on the Golden Rule of "Do unto others as you would have them do unto you."

SHOW: Show Slide 4: Video Chapter 1—*DISC Platinum Rule Introduction.*

DO: When video Chapter 1 is finished, ask participants:

> **How does the *DISC Platinum Rule*—"Do unto others as they would have you do unto them"—apply to our day-to-day business?**

Encourage participants to think of the application of *The DISC Platinum Rule* in all phases of their work day, such as:

- Their relationships with those higher than themselves on the corporate ladder

- Their relationships with those lower than themselves on the corporate ladder

- Their relationships with peers, customers, subcontractors, etc.

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4. Independent Activity: A Day at the Office   20 minutes

TELL:
- Before we get into the details of relationship strategies, let's take this opportunity to assess your understanding of behavioral styles and behavioral adaptability, which are the central concepts of the *DISC Platinum Rule.*

- Please turn to pages 2 through 4 in your Participant Guide for the activity titled **"A Day at the Office"**. **(PG 2—4)**

- This activity covers a fictional day at the office that includes meetings with a prospect and a customer, lunch with a friend, and a session with a coworker on an important new project.

- First, read about each of these characters. When you are finished, turn to the questions in Part 1 on pages 5 and 6. Answer **only the 7 questions in Part 1. (PG 5—6)**

- Each question contains four statements. For each statement, select the character from your day who, in your judgment, best meets the condition described. Write P to indicate Prospect, C for Customer, CW for Co-worker, or F to indicate Friend in the blank before the statement. An example is provided for you on page 2 of your Participant Guide.

- You will have the opportunity to finish the questions in Part 2 of this activity at the end of today's session. We'll contrast your responses from the first set of questions with the second.

DO: Allow 20 minutes for participants to complete this activity.

NOTE: You will notice that some participants finish very quickly, while others take the full 20 minutes. Ask the participants who finish early to be respectful of those who are still working—offer this as an unofficial "break" for using the restroom, etc.

5. SLIDES 5 and 6: Video Chapters 2 and 3   12.5 min.

**SHOW:**   Show Slide 5: Video Chapter 2—*Verbal, Vocal, Visual Behaviors.*

OR...

TELL:
- People won't tell you how to treat them—that would make things too easy, wouldn't it? But they'll show you, if you pay close attention to the three channels of communication.

- The three channels are the Verbal, Vocal, and Visual channels.

- The **Verbal Channel** is simply the words we use, verbatim; as if you were reading a book. It provides great information, but the verbal channel alone comes with an increased possibility of misinterpretation.

- The **Vocal Channel** is the inflection and emphasis we place on words; the way in which we *say* those words.

DO: Write a sentence on a flipchart page; for example: *I didn't ask you to file the new client's folder in the blue cabinet."* Have a few participants read the sentence, emphasizing different words, and illustrate how the different emphasis changed the meaning of the sentence.

TELL:
- The **Visual Channel** relates to body language and facial expressions. The obvious and subtle movement that can change the meaning of what someone says. Can you think of a time at work when someone communicated a great deal, without saying a word?

DO: Allow a few minutes for participants to share this experience and respond as appropriate.

SHOW: Show Slide 6: Video Chapter 3—*Open vs. Guarded Behaviors.*

OR...

TELL:
- DISC looks at two unique behavioral normative tables, making up the Behavioral Style Grid. The first that we'll discuss is the scale of Openness. This scale seeks to differentiate how Open or Guarded a person might be.

- The differences between someone who is open and someone who is guarded are typically fairly apparent. Guarded types hold their cards closer to the vest. They don't give out much personal information, and they don't ask for much in return. You may have worked with this person for years and you still don't know anything about them, and they're not telling you any time soon.

- With Open types, on the other hand, you might know their pets' names, their favorite vacation spot, and what scared them when they were young... before they have even asked your name. They are willing givers of information and can't wait to hear how your story compares to theirs.

SHOW: Show Slide 7: *Openness.*
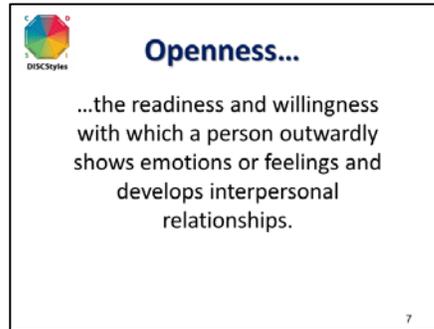
DO: Provide the following definition of **Openness:**

Openness refers to the readiness and willingness with which a person outwardly shows emotions or feelings and develops interpersonal relationships.

Have participants turn to the **"Summary of Open and Guarded Behaviors"** on page 9 of their Participant Guide **(PG 9)** and examine the scale.

TELL: • Look at the scale of Open and Guarded Behaviors. Where do you believe you fall on this scale?

  – 4 – Very Open?
  – 3 – Somewhat Open?
  – 2 – Somewhat Guarded?
  – 1 – Very Guarded?
  – Or somewhere in between?

• Take a moment to read the guarded and open behaviors and indicate on the scale to the left where you would place yourself.

• Be sure that you mark your scale confidentially so that others sitting near you cannot see your answer.

6. Independent Activity: Openness in People You Know   20 minutes

DO: Have participants turn to **"Openness in People You Know"** on page 10 in their Participant Guide. **(PG 10)**

TELL: • Think about the people you know well. Who would be a model of the Open behaviors?

•   Who would be a model of the Guarded behaviors?

•   You may refer back to the **"Summary of Open and Guarded Behaviors"** on page 9 of your Participant Guide if needed. **(PG 9)**

DO: Allow 5 minutes for this activity.

Debrief the activity by asking for volunteers to share the behaviors and characteristics that indicated to them that the person was Open, and explain why some behaviors helped in the relationship while others hindered the relationship.

Tell participants **not** to reveal the names of the individuals they identified; the focus here is on identifying *behaviors.*

Repeat the process for persons who were considered to be Guarded.

7. Break   15 minutes

DO: Announce a 15-minute break and ask participants to return promptly at _____.

8. SLIDE 8: Video Chapter 4   6 minutes

SHOW: Once participants return from their break, show Slide 8: Video Chapter 4— *Direct vs. Indirect Behaviors.*

<p align="center">**OR…**</p>

TELL: • The second scale on the Behavioral Style Grid is the scale of Directness. This scale seeks to differentiate how Direct or Indirect a person may appear when communicating.

•   On the indirect side are people who are slow to take risks; make decisions. Their inner driving need is to not be wrong. So, they check and double check. They do their homework; their due diligence. They don't use a lot of body language or intonation to emphasize points. They don't make a point to assert themselves in group conversations.

- The indirect approach may mean to bring in third party information as a prefix simply to not seem overly personally assertive; things like "according to my information" or "I think you may be right, but…" And they ask questions as a way of gaining support and clarification. They are typically more patient, diplomatic, and "go with the flow" rather than taking issue for the sake of taking it.

- At the other end, we have the Direct behaviors. They approach risk and change more quickly, spontaneously, and decisively because their inner driver is to accomplish as much as possible as quickly as possible. They are much more willing to be wrong, especially when the fix for a poor choice is relatively easy and painless.

- They tend to be frequent contributors to group conversations—even when it's not their turn. They use many more gestures, pitch changes, and intonations to get their points across. They are more likely to make emphatic, definitive statements.

SHOW: Show Slide 9: *Directness.*
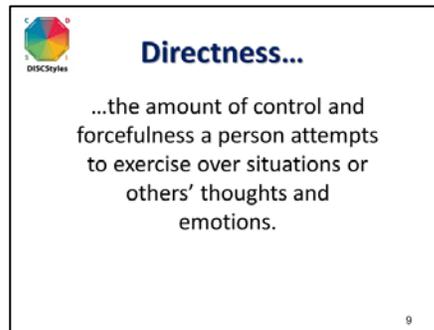
DO: Provide the following definition of **Directness:**

Directness refers to the amount of control and forcefulness a person attempts to exercise over situations or others' thoughts and emotions.

Have participants turn to the **"Summary of Direct and Indirect Behaviors"** on page 11 of their Participant Guide **(PG 11)** and have them examine the scale.

TELL:
- Look at the scale of Direct and Indirect Behaviors. Where do you believe you fall on this scale?

    – 4 – Very Indirect?
    – 3 – Somewhat Indirect?
    – 2 – Somewhat Direct?
    – 1 – Very Direct?
    – Or somewhere in between?

- Read the indirect and direct behaviors. Indicate on the scale where you would place yourself.

- Be sure that you mark your scale confidentially so that others sitting near you cannot see your answer.

9. Independent Activity: Directness in People You Know   10 minutes

DO: Have participants turn to **"Directness in People You Know"** on page 12 in their Participant Guide. **(PG 12)**

TELL:
- Think about the people you know well. Who would be a model of the Direct behaviors?

- Who would be a model of the Indirect behaviors?

- You may refer back to the **"Summary of Direct and Indirect Behaviors"** on page 11 of your Participant Guide if needed. **(PG 11)**

DO: Allow 5 minutes for this activity.

Debrief the activity by asking for volunteers to share the behaviors and characteristics that indicated to them that the person was Direct, and explain why some behaviors helped in the relationship while others hindered the relationship.

Tell participants **not** to reveal the names of the individuals they identified; the focus here is on identifying *behaviors.*

Repeat the process for people who were considered to be Indirect.

10. SLIDE 10: Video Chapter 5   11 minutes

SHOW: Show Slide 10: Video Chapter 5—*Introduction to the Four Behavioral Styles.*

<div align="center">

OR…

</div>

TELL:
- In a moment, you'll have a chance to see how closely you scored yourself versus your actual DISC report.

  - If you scored yourself as more Direct, and also more Guarded, this is the D style.

  - If you scored yourself as more Direct, but also more Open, this is the I style.

  - If you scored yourself as more Indirect, and also more Open, this is the S style.

  - If you scored yourself as more Indirect, but also more Guarded, this is the C style.

SHOW: Show Slide 11, *Platinum Rule Grid.*
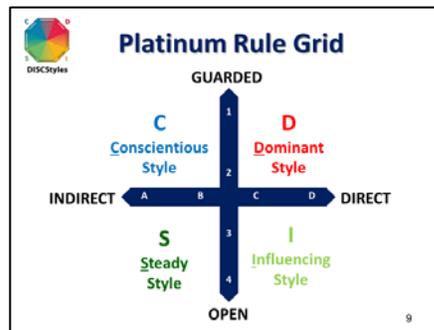
DO: Ask the following questions and have participants respond with a show of hands:

- *How many of you scored yourselves as the D style?*
- *How many scored yourselves as the I style?*
- *How many scored yourselves as the S style?*
- *And how many scored yourselves as the C style?*

Applaud participants for their efforts.

11. Lunch   60 minutes

DO: Announce a 60-minute break for lunch and ask participants to return promptly at _____.

12. Distribution of DISC Online Assessment Report   7 minutes

DO: Distribute each participant's *DISC Online Assessment Report.*

TELL:
- The *DISC Online Assessment Report* contains the results of the online DISC assessment that you completed.

- Explain that the assessment is divided into three sections:
    – Pages 1 through 8 contain general information about the DISC Model.
    – Pages 9 through 22 contain information specific to your scores.
    – Pages 23 through 38 contain information about adapting to other styles.

- You will notice that your assessment report provides information on both your natural style and your work/adapted style.

DO: Discuss the *DISC Online Assessment Report* by asking the following questions:

Earlier in this workshop, you rated yourself in terms of Openness and Directness on page 9 in your Participant Guide. (PG 9). How does your placement there compare with the results in your *DISC Online Assessment Report?*

How much correlation was there between your Natural and Adapted styles?

Why were there differences?

Expected responses and answers include:

Graph I—Adapted Style

1. Based on "Most" selections.
2. Determined by how you feel you needed to behave that day at work to be successful.
3. Graph can fluctuate from day to day for many reasons.
4. Fluctuations are typically related to responsibility, organizational demands, or boss changes.
5. Common interpretation mistake is thinking Graph I is work environment as a whole.

Expected responses and answers include:

Graph II—Natural Style

1. Based on "Lease" selections.

2. People are more accurate about themselves when speaking in terms of "Least".

3. Graph determines how you prefer to behave in any environment—work or home.

4. Graph rarely changes over the years. No need to change; it is "what it is!"

5. Common interpretation mistake—thinking Graph II reflects only home environment.

Expected responses and answers include:

Comparing Graph I with Graph II

1. Common interpretation mistake: it is bad if the two graphs are not alike.

2. Whether graphs are similar or different, both provide helpful information.

3. Variable can reflect a positive attribute of flexibility. Variance over long stretches is not recommended.

4. Compare Graph Point "D" on Graph I with Graph II (do the same for each style).

5. If graphs are similar, then respondent is working in his or her comfort zone.

6. If there is more than a two-segment spread, then the respondent is exerting effort to adapt. Respondent is working outside of his or her comfort zone.

7. Reflecting on the day one took the DISC Assessment is extremely valuable.

8. If specific activities can be identified, it will explain the behavior style variance.

13. Review of the Four DISC Styles   50 minutes

TELL:
- Now you each have a better sense of your own DISC style. However, you still might not know much about the other three styles. Let's quickly review each of the four styles to improve your understanding of the styles and your ability to identify the styles in others.

SHOW: Show Slide 12: Video Chapter 6—*Describing the D Style.*

<div align="center">

OR…

</div>

TELL:
- Let's start with the D's, our dominant patterns of behavior. Their key desires are results and outcomes. They tend to always appear to be in a hurry and are very willing delegators. D's play to win and they work BEST under pressure.

- So, what is it that D's do best? D's take charge; they're competitive. Always wanting to win. They get things done. They're unafraid to take risks. They come across an obstacle and are quick to start thinking about how to get over it, around it, under it, or even sometimes right through it!

- Now what is hard for them is *repetitiveness.* They don't like doing the same things over and over and over again. That's part of why they are such effective delegators—and they try to delegate a lot of things. They aren't very diplomatic—they tend to come on strong.

- D's don't like regulations and restrictions and are always looking for a way around the rules. If you draw a line in the sand with a D indicating "don't cross this line," you might as well be telling the D to prepare for battle, because they are going to come right up to the line, see what happens, and then take a step. They are always CHALLENGING. How many of you, based on this description, know a D?

DO: Use the following questions to lead a discussion about working with D's:

> **What do we love about working with the D's? Where do they benefit our teams and organizations?**

> **What do we dislike about working with the D's? How does their approach hinder our effectiveness?**

SHOW: Show Slide 13: Video Chapter 7—*Describing the I Style.*

<div align="center">

OR…

</div>

TELL:
- Now let's look at the I style; the more influential, interactive, expressive behaviors. The socializing style. The key desire for the I style is Fun. I's love to create energy, especially verbally. They tend to use the power of persuasion, the ability to get other people more excited about their ideas than they already are?

- Let's talk a bit about what I's do best. I's think quickly on their feet. They're eternal optimists—anything can happen. They're big dreamers; full of ideas. They're impulsive. And they are great promoters. If you want somebody to go out into the community and sell something—an idea, a product, an individual—an I is your person.

- What's hard for I's is creating formal reports. Or keeping records. In sales positions, for example, I's would much rather interact with customers than fill out sales reports. They get easily bored and don't like to re-do things once they have already been done.

DO: Use the following questions to lead a discussion about working with I's:

> **What do we love about working with the I's? How does their energy impact the team?**

> **What do we dislike about working with the I's? How is their approach a hinderance?**

SHOW: Show Slide 14: Video Chapter 8—*Describing the S Style.*

<div align="center">

OR...

</div>

TELL:
- Now let's talk about the S style; our amiable relators. Their key desire? Harmony; close, personal, friendly, one-on-one relationships. They are the *people* people: loyal, reliable team players. The problem area for our S's? They have a hard time saying "no". They don't like to rock the boat; they don't like conflict; they don't like letting people down; they don't like hurting feelings. And so they tend to go along with things, even when they really don't want to.

- What is hard for S's? They don't like competition. And do you know why? Because somebody has to lose and they don't see the benefit in that. They are slow at making big decisions because they don't like change. They prefer the tried and true methods. The way it has always been done. And they don't like to voice contrary opinions.

DO: Use the following questions to lead a discussion about working with S's:

> **What do we love about working with the S's? How does their desire to build close, personal, friendly relationships impact the team?**

> **What do we dislike about working with the S's? Does their approach hinder the team?**

SHOW: Show Slide 15: Video Chapter 9—*Describing the C Style.*

OR...

TELL:
- Okay, last one—the C style—our more conscientious, analytical, thinkers. Their key desire: order, accuracy. Their motto: everything in its place, and a place for everything. They are the great planners, problem solvers, and organizers. Great at creating systems and working to the specifications. If you want something done exactly right, give it to a C, as long as you give them the time they need to complete the work and the space to get it done alone.

- What do they do best? They are highly organized and tend to process information intellectually. They are quick to think, slow to speak. But they are great at seeing systems and are great planners.

- What's difficult for them? They don't like unpredictable people, disorganized environments, incomplete or unclear directions. They aren't very outgoing. Of all four styles, they play their cards closest to the vest. They don't give out a lot of personal information—at least not until they really get to know you and are comfortable with you. C's prefer to work alone because they have very high standards of quality and most people don't live up to those standards.

DO: Use the following questions to lead a discussion about working with C's:

> **What do we love about working with the C's? How does their desire for accuracy and organization impact the team?**

> **What do we dislike about working with the C's? How does their approach hinder the team?**

14. Verbal, Vocal, and Visual Indicators   5 – 18 min.*

TELL:
- The next three short vignettes present actors (a male and a female) depicting D-style individuals.

- The three vignettes are identical. However, in the first vignette, you will hear what's going on, but see only a still picture.

- In the second vignette, you won't hear what is going on, but you'll see all of the action.

- Finally, in the third vignette, you will have the benefit of both the audio and visual together.

- The purpose of this series is to see what we can learn about the behavioral style of D-style individuals; first from what you hear, then from just what you see, and finally from what you both see and hear.

- On page 13 in your Participant Guide, you will find the **Verbal, Vocal, and Visual Indicators to Identify Openness and Directness. (PG 13)**

SHOW: Show Slide 16: Video Chapter 10—*Identifying D Style (Audio Only)* THEN…

Show Slide 17: Video Chapter 11—*Identifying D Style (Video Only)* THEN…

Show Slide 18: Video Chapter 12—*Identifying D Style (Audio and amp; Video)*

DO: When the video series is over, conduct a group discussion about what partici-pants learned about the D style from each of the videos.

Use the following questions to lead a group discussion about their findings:

What did you learn about the people involved in the vignette by hearing only the verbal?

- **How would you describe each of these people?**

- **What do we know about them from what we heard?**

- **What do we know about them from what we saw?**

- **With the two sets of clues taken together—both the visual and the audio—are there any changes in what we determined before?**

NOTE:

> Repeat this exercise (as desired) using:
>
> - Slides 19, 20, 21: Video Chapters 13, 14, and 15—*Identifying C Style*
> - Slides 22, 23, 24: Video Chapters 16, 17, and 18—*Identifying S Style*
> - Slides 25, 26, 27: Video Chapters 19, 20, and 21—*Identifying I Style*

TELL: - The process of style identification becomes much easier when it begins with a determination of the individual's location on the major behavioral scales of Openness and Directness.

*This section will require more time if you repeat the exercise for the C, S, and I styles.

15. Activity: "The Mixer" — 20 minutes

DO: Conduct **"The Mixer"** activity by telling participants:

TELL:
- We have had some practice in observing behaviors to determine where a person is located on the Behavioral Grid.

- You will now have the opportunity to practice it.

- Turn to **"Mix and Match"** on pages 14 and 15 in your Participant Guide. **(PG 14 and 15)**

- The goal of this activity is to have each participant talk to as many people in this group as they can within a 20-minute period.

- See how many of the categories on the Mix and Match form you can fill from your quick conversations with people.

- When participants find a person who fits a category, have that person sign it, then move on to another person.

- You cannot use one signature more than once (assuming the group is large enough.

DO: Remember to encourage participants to enjoy themselves—this activity should be more fun than work! Allow 20 minutes

When the activity is completed, ask participants to return to their seats.

16. Activity: "Styles of the Famous" — 30 minutes

NOTE:

BEFORE YOU CONDUCT THIS ACTIVITY… In advance of the workshop/training, choose or solicit the names of well-known people in the public eye. From the list of names generated, select 10 individuals you are certain will be familiar to everyone (fewer if you have time constraints).

Prepare a PowerPoint slide for each individual showing that person's face.

Conduct advance research on the individuals you select to become familiar with some of their behaviors and characteristics. Focus on those that should be known to participants.

Based on your findings, prepare questions you can ask about each individual to draw out participants' perceptions of the behaviors and characteristics that will help identify the levels of Openness and Directness of each person.

TELL:
- The Mixer activity gave each participant an opportunity to meet and talk with several participants on an informal basis.

- The purpose of this activity is to give you some real-life practice in determining the degree of Openness and Directness in different people.

SHOW: Show Slide 28: *Platinum Rule Grid.*
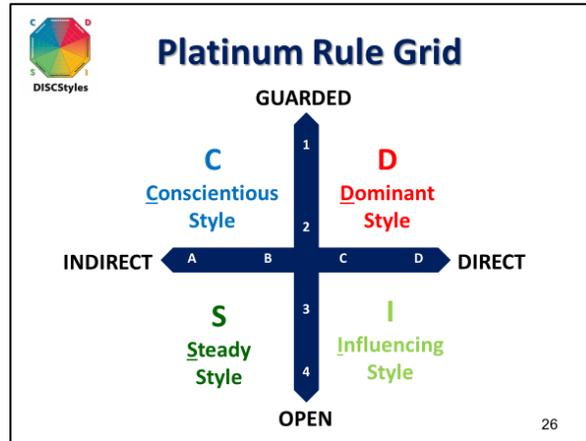
TELL:
- Remember, when we were identifying our own behavior:
  - "4" indicates a person who is highly Open.
  - "1' indicates a person who is highly Guarded.

- The vertical dimension on the scale represents Indirect to Direct behavior:
  - "A" indicates a person who is highly Indirect.
  - "D" indicates a person who is highly Direct.

- You will now have the opportunity to practice determining the degree of Openness and Directness in other people.

DO: Using the PowerPoint slide show you created for well-known people, display the slide showing the first person you selected.

Ask the participants:

Who can tell me who this person is?

Follow up with the questions you prepared for this individual; for example:

- What do we know about this individual?
- Does he/she seem a little more direct and willing to take risks?
- Does he/she seem to do something that might be viewed negatively? Or,
- Does he/she seem a little more indirect and slower paced? Diplomatic and cautious?

- On the guarded vs. open scale, does he/she hold his/her cards close to the vest, not wanting to let people in to his/her personal affairs? Or,

- Does he/she seem more willing to share—even desiring the spotlight?

Continue this process for each individual you have chosen to present. Be prepared for comments on behavior and characteristic choices offered by participants.

NOTE:

> **OPTION…** If you cannot prepare for this activity in advance, conduct the exercise using the steps outlined below. Participants can use the **Styles of the Rich and Famous** worksheet on page 16 of the Participant Guide to rate the well-known individuals they identify.

DO: Ask participants to think about people in the public eye with whom most (if not everyone) will be familiar.

Solicit names of those people from participants and write them on a flipchart page until there is a list of 10 people (fewer if you have time constraints).

TELL:
- For each individual, you will assign a letter and number that represents your opinion of the individual's degree of Openness and Directness.

- For example, if you think that [*state the name of the first person on the list*] is slow-paced and fairly open, you might write an "A-3" for that person, which would indicate that he/she is a what?

  [Pause] A Steady style.

- On the other hand, if you think that [*state the name of the first person on the list*] is strongly guarded and very direct, you might write a "D-1" for that person, which would indicate he/she is a what?

  [Pause] A Dominant style.

DO: Have participants turn to the worksheet on page 16 of the Participant Guide and write the names of the people listed on the flipchart in the column labeled **Person. (PG 16)**

TELL:
- For each person listed, write your opinion of the degree of Openness and Directness of that person and assign a style. You will have about 8 minutes to complete this activity. You may refer to the lists of behaviors for each scale on pages 9 and 11 of your Participant Guide. **(PG 9 and 11)**

DO: Allow 8 minutes for the activity.

Lead a discussion about the behaviors and clues participants used to determine the Openness and Directness of the well-known individuals from the previous activity.

NOTE: During this discussion, make sure you **point out** that each of us has a set of clues we work with when it comes to trying to determine style and that these set of clues should never be considered static. The more and/or better our clues, the greater the chance for accurate identification and thus effective communication.

TELL: • Let's take a look, now, at how you perceived the Openness and Directness of the individuals from the last exercise.

DO: Use the following questions to lead a discussion:

Let's begin with [*state the name of the second person on the list*]. What number and letter did any of you assign to him/her?

NOTE:
> Encourage feedback from several people in order to reach a consensus.
>
> Once a consensus is achieved, place a mark on the grid in the appropriate spot and write the person's first name next to it (followed by the initial of the last name if there are two or more in the class with that name).

How did _____'s behavior lead you to this evaluation? What were the clues?

NOTE:
> Accept feedback from several people.
>
> Use a different color of marker and mark that spot on the grid with the person's first name (and initial) if necessary.
>
> Repeat this process for everyone on the list, using different colored markers for each individual, if possible.

Based on your rating, what style would you assign to _____?

NOTE:
> Again, accept feedback from participants. If there are discrepancies, discuss the clues and behaviors that were considered when assigning a rating or style.

DO: Divide participants into small groups according to their styles.

Distribute several sheets of newsprint, a felt-tipped marker, and masking tape to each group.

TELL: Give the following directions:

- Discuss among yourselves how you like to be treated—by coworkers, by supervisors and managers, by employees, by friends and family.

- Designate a "recorder" who will write the agreed-upon responses on the sheet of flipchart paper.

- List every response that is mentioned that your group can agree is representative of them.

- Post the list and identify someone in each style group who can present the list to the entire class.

- Give the class the next 8 minutes or so to complete their lists.

DO: When participants are finished, reconvene the entire group.

Ask each group to present their list. [**NOTE:** You might want to suggest to participants that they take notes on what each group says about itself.]

Ask participants:

> **What did you learn about dealing with other styles that you didn't know before?**

Respond to participants' answers.

TELL: Refer back to the *DISC Platinum Rule* by telling participants:

- By knowing how different styles want to be treated, you will be far more successful in communicating/connecting with them.

17. Break   15 minutes

TELL: Announce a 15-minute break and ask participants to return promptly at _____.

18. Adaptability   20 – 25 min.

TELL:
- In this chapter, Tony will introduce the concept and importance of *adaptability.*

- Adaptability has to do with *applying* the *DISC Platinum Rule*—treating others as they want and need to be treated.

SHOW: Show Slide 29: Video Chapter 22—*Introduction to Adaptability.*

TELL:
- Now we're going to take a closer look at adaptability strategies with each of the four styles, beginning with the Dominant style.

- Following Tony's discussion, the Dominant style actors return to give you suggestions about how best to get along with them.

SHOW: Show Slide 30: Video Chapter 23—*Adaptability with the D Style.* THEN…

Show Slide 31: Video Chapter 24—*D-Style Actors—Adaptability Tips*

TELL:
- In the next two chapters, Tony discusses adaptability strategies with the Influencing style.

- Following Tony's discussion, the Influencing style actors will return to give you suggestions about how best to get along with them.

SHOW: Show Slide 32: Video Chapter 25—*Adaptability with the I Style.* THEN…

Show Slide 33: Video Chapter 26—*I-Style Actors—Adaptability Tips*

TELL:
- Now we'll move on to adaptability strategies with the Steady style.

- Following Tony's discussion, the Steady style actors will return to give you suggestions about how best to get along with them.

SHOW: Show Slide 34: Video Chapter 27—*Adaptability with the S Style.* THEN…

Show Slide 35: Video Chapter 28—*S-Style Actors—Adaptability Tips*

TELL:
- In these next two chapters, we look at adaptability strategies with the Conscientious style.

- Following Tony's discussion, the Conscientious-style actors will return to give you suggestions about how best to get along with them.

SHOW: Show Slide 36: Video Chapter 29—*Adaptability with the C Style.* THEN…

Show Slide 37: Video Chapter 30—*C-Style Actors—Adaptability Tips*

DO: At the end of all the DVD adaptability chapters, use the following questions to lead a discussion on using various strategies when dealing with each of the four styles.

> **After watching the various chapters on adaptability strategies with each style, what additional strategies can you add, based on your past experiences, when dealing with the Dominant style?**

> **What additional strategies can you add, based on your past experiences, when dealing with the Influencing style?**

What additional strategies can you add, based on your past experiences, when dealing with the Steady style?

What additional strategies can you add, based on your past experiences, when dealing with the Conscientious style?

TELL:
- Now let's look at a humorous way to identify each style's ideal automobile.

SHOW: Show Slide 38: Video Chapter 31—*Cars of the Four Styles.*

NOTE: **OPTIONAL:** If you wish, continue this activity using Slide 39: Video Chapter 32: *Songs of the Four Styles* and Slide 40: Video Chapter 40: *How Does Each DISC Style Fire an Employee?*

DO: Direct participants back to "A Day at the Office" on pages 2 through 8 in their Participant Guide. **(PG 2—8)**

TELL:
- At the beginning of this workshop, you completed the first group of answers in Part 1 of the worksheets for "A Day at the Office."

- Its purpose was to give you some exposure to behavioral styles and behavioral adaptability prior to participating in this workshop.

- Now we will try the second group of items in Part 2. As you try to determine your answers, think first as to which characters seem more indirect versus direct, and then more open versus guarded. By re-reading their information, you should find that you have one of each of the DISC styles.

- Let's see if identifying the characters by style makes it easier to determine the answers.

DO: Allow 15 minutes for participants to complete Part 2.

When participants are finished, ask them to comment on the activity using the following questions:

Did you find that you made any changes?

How were your final score results?

Respond as appropriate.

Introduce participants to "The DISC Platinum Rule Action Plan on page 21 in the Participant Guide. **(PG 21)**

TELL:
- An action plan is a tool that gives you an important opportunity to plan how you are going to use your new skills in style identification and adaptability before you return to your day-to-day activities.

- This action plan requires that you identify two people with whom you currently have a professional or social relationship.

- It also guides you through a brief examination of those relationships and how to make those relationships more successful by identifying their behavioral styles and adapting to those behavioral styles.

DO: Ask if there are any questions.

Allow 15 minutes for participants to complete their action plans.

19. OPTIONAL: Summary Activity: A Day in the Life   35 – 45 min.

DO: Divide participants into four groups based on style: D's, I's, S's, C's.

Provide each group with a sheet of flipchart paper, a pack of markers, and (if you want), items such as cotton balls, stickers, wooden sticks, and other items that can be used for decorating a poster.

TELL:
- Using the flipchart paper, markers, and any other items, create a piece of art you will call A DAY IN THE LIFE OF A [Dominant, Influencing, Steady, Conscientious] style. The art should represent the behaviors and characteristics that embody your style.

- You will have about 20 minutes to work on your poster.

- When you are finished, each group will present their poster to the larger group.

DO: Have participants begin work on their posters. Be available to answer any questions.

This is a fun project; do what is necessary to get participants enthusiastic about the creative process and accepting the art work.

NOTE: While participants are working on their art, make note of the behaviors each group exhibits during the creative process. Typical behavior: I's will turn the process into a party. D's will have their arms crossed, mentally planning and trying to delegate drawing tasks to each other. C's will typically create pieces of art that have right angles—even around the art itself. S's will tend to circle around the work area, as well as create a circle around the piece of art.

DO: Debrief the activity by having each group present their work of art. As they do this, point out the behaviors you observed as they were working that were typical of their style.

SHOW: Show Slide 41: Video Chapter 34—*I Wish I Knew about DISC in School;* Tony's summary of the DISC styles.

DO: When the video is finished, review the program objectives.

As you state each objective, ask participants if they feel that this objective has been met. Just a head nod is all the response needed.

SHOW: Show Slide 42: *Objectives.*
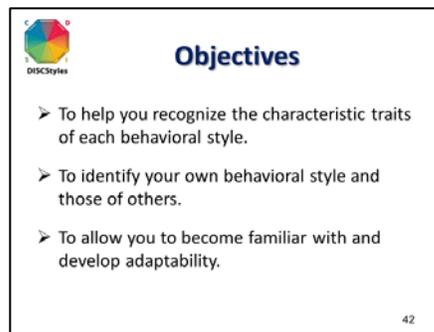
TELL: • At the beginning of today's session, we identified the specific objectives of this program:

- To help you recognize the characteristic traits of each behavioral style.

- To identify your own behavioral style and the styles of others.

- To allow you to be familiar with true adaptability and how to apply it.

DO: Review the list of participant expectations created at the beginning of the program.

Review each expectation. Ask participants if the expectation was met and if not, why?

Ask if there are any questions.

20. Evaluation and Closing   5 minutes

DO: Distribute one copy of the Program Evaluation Form to each participant.
Ask participants to please complete the forms and leave them _____
(designate a place).

TELL: • Should you be interested in more detail on the subject of behavioral styles,
Appendices A through G of Participant Guide cover behavioral characteristics
and styles, how to identify the styles, relationship compatibility, behavioral
adaptability, leadership, and team build. These can be used as a quick
reference. However, if you are interested in further reading, you will find a
number of listings in the Bibliography in Appendix H. **(PG 23—80)**

NOTE: Appendix C, How to Identify the Styles, has an optional activity: "The
Seminar." Appendix E, Behavioral Adaptability, has an optional activity:
"Boardroom Vignette."

DO: Thank the group for their participation.

Close the session on time.

APPENDIX

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