

Everything DiSC® Sales: Virtual Facilitation Activities

In this document, we provide some guidance for running a virtual *Everything DiSC® Sales* session focused on the most impactful activities. The overview provides a high-level look at the activities and options, followed by a more detailed description of each activity. The instructions presume that you have access to an *Everything DiSC Sales Facilitation Kit*. We encourage you to be creative with these ideas, given your situation and the capabilities of your virtual delivery platform.

Overview

Topic	Activity	Requires	Time (mins)
1. Your DiSC® Sales Style	1.1 Icebreaker	Breakout rooms preferable	6
	1.2 The DiSC model	Video	10
	1.3 Your DiSC style	Breakout rooms preferable	15
	1.4 Shading & priorities	-	3
	1.5 Your sales strengths	Breakout rooms preferable	10
	1.6 Your sales challenges	Breakout rooms preferable	25
2. Buying Styles	2.1 Introduction to customer mapping	Video	5
	2.2 Practice customer mapping	Video; optional polling	30
	2.3 Buying styles	Video; breakout rooms preferable	50
3. Adapting to Your Customer	3.1 Discuss prior experience	Breakout rooms preferable; optional polling	7
	3.2 Ineffective and adapted approaches	Video; breakout rooms preferable	50
	3.3 Role play	Handout 6.2; breakout rooms required	30
	3.4 Strategies	-	12

General Tips

- We suggest keeping your session length to 2 hours or less. That may require breaking the workshop into multiple sessions and/or selecting only some of the topics or activities below.
- If you do not have the capability to create breakout rooms, consider splitting the class into multiple smaller sessions. This will allow for discussions, which are a powerful part of the Everything DiSC® workshop.
- Although some webinar platforms allow you to stream a video from a PowerPoint® presentation, this can sometimes provide choppy viewing for participants. Consider using Wiley's Video Streaming Service, which provides a consistent viewing experience by sharing the links to each video with participants. If you're already using the service, you'll need the individual links provided for each of the videos. If you're not using the service, but are interested in doing so, please contact your Authorized Partner.
- This guide has several activities that assume prior sales experience. If working with inexperienced salespeople, you can ask learners to think of a time that they were trying to persuade someone to do something (instead of thinking of a customer).

Note: Facilitator's Guide page numbers in this document are for the most recent version of the Guide, which was released in April 2020.

Topic 1: Your DiSC® Sales Style

1.1 Icebreaker (6 min; breakout rooms preferable)

Assign learners to breakout rooms in groups of three and ask each person to describe a difficult selling experience with a customer who had a much different personality than them. Allow 4 minutes for this discussion. If you are not using breakout rooms, you can have learners think of an example and ask two people to share with the large group. If learners are inexperienced in sales, they can describe a time when they were the customer in such a situation.

1.2 The DiSC model (10 min; requires ability to show video)

Explain that "different customers expect different things during the sales process, and there is a model that helps us understand not only what those customers prioritize but also what we tend to naturally prioritize without even thinking about it. The model is called DiSC®." Then share the link to the *DiSC Sales Styles* video in the chat and ask learners to watch.

After learners have had time to watch the video, direct their attention to page 2 of their profile and reference the DiSC model at the bottom of the page. Then refer learners to the Cornerstone Principles box and speak to the first two bullets.

1.3 Your DiSC style (15 min; breakout rooms preferable)

As described starting on page 4 of the Facilitator's Guide, direct learners to read page 3 of their profiles and then describe the concept of inclination. Then direct learners to read page 4 of their profile, asking them to read and write down at least two insights that really resonate with them. Then put learners in same-style breakout rooms for 5 minutes to share the insights they wrote down. If groups are larger than four people, break them into multiple groups. If you are not using breakout rooms, ask for a volunteer of each style to share an insight they wrote down.

1.4 Shading & priorities (3 min)

As described starting on page 6 of the Facilitator's Guide, explain the concepts of priorities and shading. Then direct learners to page 5 of their profiles and ask them to take note of their priorities. Let them know that they can read about their priorities later but give them a minute to review the description of any priorities that might be unclear.

1.5 Your sales strengths (10 min; breakout rooms preferable)

Ask learners to read through their strengths on page 6 of their profile and write down three that they think have most benefitted them as a salesperson. If this is an inexperienced group, learners can identify strengths that have benefitted them in life. Then put learners in same-style breakout rooms for 5 minutes, with a maximum of four people each, and have them share one or two strengths each. If you are not using breakout rooms, ask one person from each style to share one or two of their strengths.

1.6 Your sales challenges (25 min; breakout rooms preferable)

Ask learners to read through their challenges on page 7 of their profile and write down three that they think have most gotten in their way as a salesperson. If this is an inexperienced group, learners can identify challenges that have caused them trouble in life. Then put learners in same-style breakout rooms for 5 minutes, with a maximum of four people each, and have them share one or two challenges each. If you are not using breakout rooms, ask one person from each style to share one or two of their challenges.

Bring all learners back together and, starting with the D group, ask if they heard any commonalities among themselves when they were discussing both the strengths and challenges. Ask the same question of the other three style groups.

Topic 2: Buying Styles

2.1 Introduction to customer mapping (5 min; requires ability to show video)

Refer learners to page 8 of their profiles and ask them to notice the bolded words within each style description. Explain that they will be using these continua to do something called customer mapping. Introduce the idea of customer mapping and then, in the chat, share the link to the *Introduction to Customer Mapping* video and ask them to watch.

2.2 Practice customer mapping (30 min; requires ability to show video; optional polling)

Tell participants that you are going to play a game in which they will watch a short video of a customer and guess their style. As described on page 19 of the Facilitator's Guide, ask learners to choose an actor. You can do a poll or use chat. Share the *Customer Mapping Round 1* video link in chat and ask learners to watch it. When learners are finished, have a poll waiting for them with D, I, S, and C as options, and ask them to choose the one that they think best describes the customer. If you don't have access to polls, learners can put their responses in the chat. Debrief the answer as described in the Facilitator's Guide. You can encourage learners to keep track of their score with one point for each correct answer. Repeat this process for the next seven videos as described in the Facilitator's Guide. At the end, if learners were keeping score, ask learners to share their final scores in the chat.

2.3 Buying styles (50 min; requires ability to show video; breakout rooms preferable)

Start by asking learners to list ten customers with whom they have worked in the recent past. If learners don't yet have much sales experience, they can list people with whom they have worked in the past. Then, as described starting on page 24 of the Facilitator's Guide, explain that the group is going to focus on understanding what drives the buying styles. Share the link for the *D Style Customer Priorities* video in the chat and ask learners to watch. After learners are finished, ask them to read the bottom section of page 9 in their profile and then identify any of the customers from their list that they think have that style.

Place learners in same-style breakout rooms to discuss the following question: "Compared to other customers you have worked with, what in particular do these customers expect and find frustrating?" If any of the style groups have more than four members, break them into smaller groups. Give groups 5 minutes to discuss. When time is up, reconvene the large group and ask the groups to share their observations. Repeat this process (read, watch, discuss) for the other three DiSC® buying styles.

If not using breakout rooms, you can assign groups to independently read about different styles and be prepared to speak to what that style expects and finds frustrating. Ask each style group to read about the opposite style from them (e.g., those with an S style read about customers with a D style). Then, starting with a discussion of the D buying style, ask the S group to report on their observations. After they finish, ask learners with the D style what they have to add, based on their experience being a customer. Repeat this process for the other three styles.

Topic 3: Adapting to Your Customer

3.1 Discuss prior experience (7 min; breakout rooms preferable; optional polling)

As described on page 29 of the Facilitator's Guide, ask learners to share a story with a partner about a time when they were a customer, and a salesperson did not adapt to their buying style. Send learners into breakout rooms with a partner for 3 minutes. If not using breakout rooms, instruct learners to think of the experience and ask for two or three volunteers to share their stories.

When time is up, reconvene the large group and post the following poll:

To what degree do you think the salesperson realized they weren't communicating effectively?

- A lot
- Somewhat
- A little
- Not at all

If you don't have access to polls, you can number the response options and put both the question and responses on a slide or in the chat and ask learners to respond via chat.

Briefly reference the results and tell learners that "we are going to explore some practical tips that will help you adapt your selling approach to your customers."

3.2 Ineffective and adapted approaches (50 min; requires ability to show video; breakout rooms preferable)

Tell learners that they are going to watch a series of sales interactions to see what works and what doesn't. Share the link for a *Sally, Ineffective* video (with either Adia or Jim) and ask learners, while they are watching, to note which of Sally's cues were being overlooked or ignored by the salesperson. After learners have watched the video, place them in random breakout rooms in groups of three or four for 3 minutes and ask them to discuss their observations. When time is up, reconvene the large group and ask for a few groups to share their discussion. Use the "listen for" notes on pages 32 or 33 in the Facilitator's Guide to help guide this discussion. Then share the *Sally, Adapted* video link (with either Adia or Jim, depending on which one you used for the Ineffective video) for learners to watch. Repeat this process for all three styles. If you are not using breakout rooms, this can just be conducted as a longer large-group discussion (combining the time for the breakout rooms and the large-group discussion for each style).

3.3 Role play (30 min; breakout rooms required)

As described starting on page 43 of the Facilitator's Guide, assign learners to breakout rooms in pairs so they can take turns role playing a sales interaction where they consider the customer's DiSC style and priorities. Learners playing the salesperson role will spend 2 minutes reviewing page 25 to develop a sales strategy. This "salesperson" will need to share with their partner what DiSC® style they will be selling to. During this period, learners playing the customer role will review Handout 6.2 (which you will need to post in the chat) to prepare for their role. The pair will then take 5 minutes to role play and 3 minutes to discuss. They will need to time themselves, but you can pop into breakout rooms to remind them if your group is not too large.

After the first round, bring learners back to the large group. Ask those "salespeople" who sold to the D customer to share what they did that was not part of their normal approach. Repeat this question for the other three styles. Then send pairs back into breakout rooms to switch roles, taking 2 minutes to prepare, 5 minutes to role play, and 3 minutes to discuss.

Note that if you are not using breakout rooms, activity 3.3 can be skipped.

3.4 Strategies (12 min)

Present slide 47 from the PowerPoint® deck. Remind learners that "being an effective salesperson often means shifting to meet the priorities of your customers, but some of these priorities come more naturally to us as salespeople than others." Ask them to pick two priorities from around the circle that they think are least intuitive for them to relate to or sell to. For each one of those priorities, they will write down two strategies that they can keep in mind during their work. Encourage them to use pages 18 through 21 of their profiles while brainstorming, tailoring the tips to their products and industry. Give learners 8 minutes to complete this independently. After time is up, encourage learners to find a place to display these strategies so they will be top of mind. Tell them that as these strategies become more instinctive, they can add more. Thank learners for their time.