Building Relationship Versatility: Social Styles at Work

Participant Guide

1. The Business of Versatility
2. Identify Style
3. Reflect on Style Expectations
4. Modify Your Behavior
5. Managing Styles in Conflict
6. Mastering Versatility
7. Toolkit
BUILDING RELATIONSHIP VERSATILITY:  
SOCIAL STYLES AT WORK

THE BUSINESS OF VERSATILITY
Welcome to Building Relationship Versatility: Social Styles at Work

Purpose

Develop results-oriented communication skills for working effectively with different people.

Process

- Define the importance of versatility and the benefits it can have on your work.
- Develop skills to help you identify the different ways people communicate.
- Reflect on the different expectations and preferences people have for those with whom they work and interact.
- Adapt the way you work with others in order to meet their expectations and preferences.

Payoff

Skills and approaches that result in increased effectiveness, greater productivity, and better business results.
Activity: Working in Your World

Purpose

Understand the impact that communication has on your work.

Process

1. Work together in small groups.
2. Introduce yourself to the other people in your group.
3. Discuss these questions from your prework:
   - What are you seeing in your environment that points to a need for being good at communicating and building relationships at work?
   - What challenges do you face in communicating with others and building productive relationships at work?
   - What impact do these experiences and challenges have on you?
   - What are your expectations for this workshop?
4. Identify and record on flipchart paper the key themes from each discussion point. Be prepared to share your work with the larger group.
5. When directed by the facilitator, your small group will present its findings to the larger group. Be sure to begin by introducing your team.
Overview: The Business of Versatility

Purpose

Define the importance of versatility and the benefits it can have on your work.

Process

- Describe the benefits that building good relationships with others has on your effectiveness and on business results.
- Define versatility and its importance to your work.
- Describe a simple three-step approach for communicating and working more effectively with others.

Payoff

Appreciation for the importance that versatility has for your personal and business success, and an approach for increasing your effectiveness with the people you work with.
Kurt has been under a great deal of pressure to increase revenue. A client that Kurt wants to do business with has a reputation for pressuring suppliers in order to get the lowest price. Ben is in charge of providing the necessary bids to win the business. He doesn’t trust this client. Kurt will try to convince Ben to help him put together a proposal for the client.

Answer these questions as you watch the video:

1. What were the results of this interaction?

2. What specific behaviors did you observe that contributed to the outcome?
   - Kurt’s behaviors
   - Ben’s behaviors

3. What effect did these behaviors have on their relationship?

4. What advice would you give Kurt about how to handle this interaction differently and more effectively?
Video: Versatility in Communications

Versatility is a conscious choice of behaviors that can improve the way people work together. If Kurt could make different choices about his behavior when talking to Ben, it might look like what you will see in the next video.

Answer these questions as you watch the video:

1. What were the results of this interaction?

2. What specific behaviors did you observe that contributed to the outcome?
   - Kurt's behaviors
   - Ben's behaviors

3. What effect did these behaviors have on their relationship?

4. What effect did these behaviors have on accomplishing the task?
**Time and Tension**

Relationship Tension is the discomfort or insecurity people feel when a relationship is new or when there is difficulty in the relationship.

Task Tension is the level of interest or urgency that a person feels about working with someone on a specific task.
**What Is Versatility?**

The ability to adapt one’s own behaviors to meet the concerns and expectations of others in order to create productive relationships

**Benefits**

Versatility helps you to:

- Increase your influence on and motivation of others.
- Gain commitment to your ideas, instead of compliance.
- Improve collaboration in your team.
- Increase your effectiveness and productivity, thereby achieving better business results.

**Research**

- Managers with higher levels of versatility are perceived as more effective by their direct reports, and they receive more positive performance reviews.
- Sales managers with higher versatility have sales teams that generate more revenue, have higher levels of customer satisfaction, and have greater employee satisfaction than sales managers with lower versatility.
- Companies with higher levels of versatility have better global working relationships than companies with lower levels of versatility.
- Managers with higher levels of versatility are more trusted by their direct reports than managers with low levels of versatility.
- Individual employees with higher levels of versatility perform better than employees who lack versatility skills.
The Versatile Response

Gain the benefits of good working relationships by answering these three questions:

1. What is the person’s Social Style?
2. What does this person expect from me interpersonally?
3. What can I do to improve my communication and relationship with this person?

The Versatile Response will help you to answer these questions.

The Versatile Response

**Identify**

*Identify* the person’s Social Style.

“She or he is …”

**Reflect**

Based on the person’s Social Style, *Reflect* on and describe her or his expectations for interactions with you.

“So she or he needs …”

**Modify**

Decide how to *Modify* your behaviors to maximize your effectiveness.

“Therefore I will …”
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

IDENTIFY STYLE
Overview: Identify Style

The Versatile Response

Identify
Identify the person’s Social Style.
“She or he is ...”

Reflect
Based on the person’s Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs ...”

Modify
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will ...”

Purpose

Develop Social Style identification skills.

Process

- Understand the fundamental premises of Social Styles.
- Define the two behavioral dimensions of assertiveness and responsiveness.
- Describe the four main clusters of Social Style behavior.
- Find out how people perceive your behavior in terms of the Social Style model.
- Develop skills to accurately identify others’ styles.
- Apply Social Style identification skills to the people with whom you work.

Payoff

Ability to accurately identify others’ Social Styles
**Premises of Social Style**

- We are creatures of habit.

- People are different.

- We make judgments about other people’s habits.
**Video: Who Is Easy or Difficult to Work with?**

Which people would you find it easy or difficult to work with?

Write your reactions to each person in the video.

<table>
<thead>
<tr>
<th>PERSON 1</th>
<th>EASY</th>
<th>DIFFICULT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON 2</th>
<th>EASY</th>
<th>DIFFICULT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON 3</th>
<th>EASY</th>
<th>DIFFICULT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON 4</th>
<th>EASY</th>
<th>DIFFICULT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Premises of Social Style**

- We are creatures of habit.

- People are different.

- We make judgments about other people’s habits.

- Focusing only on behavior allows us to avoid the pitfalls of judgment and understand what others need to work effectively with us.
Definition: Assertiveness

The way in which a person is perceived as attempting to influence the thoughts and actions of others

ASK
Directed

TELL
Directed

APPROACH

STATEMENTS

QUESTIONS

PACE

INTERRUPTIONS

BODY POSITION

VOLUME

EYE CONTACT

DECISIONS
Definition: Responsiveness

The way in which a person is perceived as expressing feelings when relating to others
Video: The Four Social Styles

Watch the video and record the key characteristics of each style in the appropriate quadrant.
### Identify Style

**Video: Social Styles at Work**

<table>
<thead>
<tr>
<th></th>
<th>Amiable</th>
<th>Driver</th>
<th>Analytical</th>
<th>Expressive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Teamwork</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Non-verbals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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© Wilson Learning Worldwide Inc. V7 WLW 52228
All rights reserved.
<table>
<thead>
<tr>
<th>Style</th>
<th>WORKING WITH THIS STYLE</th>
<th>DEALING WITH STRESS</th>
<th>THEMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMIABLE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRIVER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANALYTICAL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXPRESSIVE</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Activity: Identifying Others’ Styles

The Versatile Response

Identify
Identify the person’s Social Style.
“She or he is …”

Reflect
Based on the person’s Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs …”

Modify
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will …”

Purpose
Practice identifying different Social Styles.

Process
1. Work in teams.
2. Read the Style Identification Guidelines on the next page.
3. Use the Style Identification—Behavior Clues page to help you during this activity.
4. Watch the Social Style video clips that depict people describing their ideal work environment. While you watch, note on the Style Identification Worksheets each person’s assertiveness and responsiveness behaviors.
5. In your teams, use your notes to discuss and identify each person’s Social Style. Discuss the assertiveness and responsiveness indicators that you observed, and note where you would place the person on the assertiveness and responsiveness scales. Then circle your team’s assessment of the person’s Social Style.
Style Identification Guidelines

Style identification is most accurate when observing one dimension at a time.

Start with assertiveness.
Look for specific behaviors that will help you to identify assertiveness accurately.

- Starting at the center of the assertiveness scale, ask, “Is this person ask directed or tell directed?”
- Look for pace (faster or slower), voice (more or less volume), and body language (forward or relaxed).

Consider responsiveness.
Look for specific behaviors that will help you to identify responsiveness accurately.

- Starting at the center of the responsiveness scale, ask, “Is this person task directed or people directed?”
- Look for voice (even or modulated), body language (less or more animation), and focus (primarily task or primarily people).

Identify the person’s Social Style.
Put the two scales together. The intersection of your assertiveness conclusion and your responsiveness conclusion will indicate the person’s primary Social Style.
### Style Identification—Behavior Clues

<table>
<thead>
<tr>
<th>Task Directed</th>
<th>Tell Directed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses fewer gestures, minimal body language</td>
<td>Uses declarative language</td>
</tr>
<tr>
<td>Has a consistent tone and voice inflection</td>
<td>Makes more statements than questions</td>
</tr>
<tr>
<td>Shares and displays fewer emotions</td>
<td>Leans forward</td>
</tr>
<tr>
<td>Displays less variety in facial expression</td>
<td>Has a rapid rate of speech</td>
</tr>
<tr>
<td>Focuses dialogue first on task and facts</td>
<td>Speaks at a louder volume</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People Directed</th>
<th>Ask Directed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses more and wider gestures and body language</td>
<td>Leans back</td>
</tr>
<tr>
<td>Has a varied tone and voice inflection</td>
<td>Has a deliberate rate of speech</td>
</tr>
<tr>
<td>Shares and displays more emotions</td>
<td>Speaks at a softer volume</td>
</tr>
<tr>
<td>Displays more facial expression</td>
<td>Makes fewer interruptions</td>
</tr>
<tr>
<td>Focuses dialogue first on people and relationships</td>
<td>Makes more frequent interruptions</td>
</tr>
</tbody>
</table>
### Video: Style Identification Worksheet 1

<table>
<thead>
<tr>
<th>PERSON 1:</th>
<th>PERSON 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Identify Assertiveness</strong></td>
<td><strong>Identify Assertiveness</strong></td>
</tr>
<tr>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
</tr>
<tr>
<td><strong>Identify Responsiveness</strong></td>
<td><strong>Identify Responsiveness</strong></td>
</tr>
<tr>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
</tr>
<tr>
<td><strong>Identify Social Style</strong></td>
<td><strong>Identify Social Style</strong></td>
</tr>
<tr>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
<td><img src="image" alt="ASK Directed" /> <img src="image" alt="TELL Directed" /></td>
</tr>
</tbody>
</table>

**Why? (Assertiveness Indicators)**

**Why? (Responsiveness Indicators)**
### Video: Style Identification Worksheet 2

<table>
<thead>
<tr>
<th>PERSON 3:</th>
<th>PERSON 4:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Identify Assertiveness</strong></td>
<td><strong>Identify Assertiveness</strong></td>
</tr>
<tr>
<td>ASK Directed</td>
<td>ASK Directed</td>
</tr>
<tr>
<td>TELL Directed</td>
<td>TELL Directed</td>
</tr>
<tr>
<td><strong>Why? (Assertiveness Indicators)</strong></td>
<td><strong>Why? (Assertiveness Indicators)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Identify Responsiveness</strong></th>
<th><strong>Identify Responsiveness</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TASK Directed</td>
<td>TASK Directed</td>
</tr>
<tr>
<td>PEOPLE Directed</td>
<td>PEOPLE Directed</td>
</tr>
<tr>
<td><strong>Why? (Responsiveness Indicators)</strong></td>
<td><strong>Why? (Responsiveness Indicators)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Identify Social Style</strong></th>
<th><strong>Identify Social Style</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TASK</td>
<td>TASK</td>
</tr>
<tr>
<td>Analytical</td>
<td>Analytical</td>
</tr>
<tr>
<td>Driver</td>
<td>Driver</td>
</tr>
<tr>
<td>ASK</td>
<td>ASK</td>
</tr>
<tr>
<td>Amiable</td>
<td>Amiable</td>
</tr>
<tr>
<td>TELL</td>
<td>TELL</td>
</tr>
<tr>
<td>Expressive</td>
<td>Expressive</td>
</tr>
<tr>
<td>PEOPLE</td>
<td>PEOPLE</td>
</tr>
</tbody>
</table>
**Person 5:**

<table>
<thead>
<tr>
<th>Identify Assertiveness</th>
<th>Identify Responsiveness</th>
<th>Identify Social Style</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASK</strong> Directed</td>
<td><strong>ASK</strong> Directed</td>
<td><strong>TASK</strong> Directed</td>
</tr>
<tr>
<td><strong>TELL</strong> Directed</td>
<td></td>
<td><strong>Analytical</strong></td>
</tr>
<tr>
<td><strong>PEOPLE</strong> Directed</td>
<td><strong>Amiable</strong></td>
<td><strong>Expressive</strong></td>
</tr>
</tbody>
</table>

Why? (Assertiveness Indicators)

**Person 6:**

<table>
<thead>
<tr>
<th>Identify Assertiveness</th>
<th>Identify Responsiveness</th>
<th>Identify Social Style</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASK</strong> Directed</td>
<td><strong>ASK</strong> Directed</td>
<td><strong>TASK</strong> Directed</td>
</tr>
<tr>
<td><strong>TELL</strong> Directed</td>
<td></td>
<td><strong>Analytical</strong></td>
</tr>
<tr>
<td><strong>PEOPLE</strong> Directed</td>
<td><strong>Amiable</strong></td>
<td><strong>Expressive</strong></td>
</tr>
</tbody>
</table>

Why? (Assertiveness Indicators)

**Video: Style Identification Worksheet 3**
### PERSON 7:

<table>
<thead>
<tr>
<th>Identify Assertiveness</th>
<th>Identify Responsiveness</th>
<th>Identify Social Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASK Directed</td>
<td>TASK Directed</td>
<td>ASK Directed</td>
</tr>
<tr>
<td>TELL Directed</td>
<td></td>
<td>TELL Directed</td>
</tr>
</tbody>
</table>

**Why?** (Assertiveness Indicators)

**Why?** (Responsiveness Indicators)

### PERSON 8:

<table>
<thead>
<tr>
<th>Identify Assertiveness</th>
<th>Identify Responsiveness</th>
<th>Identify Social Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASK Directed</td>
<td>TASK Directed</td>
<td>ASK Directed</td>
</tr>
<tr>
<td>TELL Directed</td>
<td></td>
<td>TELL Directed</td>
</tr>
</tbody>
</table>

**Why?** (Assertiveness Indicators)

**Why?** (Responsiveness Indicators)
Tips to Help You Identify at a Distance

With e-mail/written communication

Notice the sender’s priorities:

- Relationship first or task first

Pay attention to the use of language:

- Declarative or conditional

Does the person make use of any emoticons or unique formatting?

On the phone

When you are only communicating via telephone or e-mail, you will not have the advantage of observing body language.

- Pay attention to the other person’s tone of voice.
- Ask the other person questions to discover his or her style preferences and expectations.
- Ask questions of other people who have worked with the person before to discover the person’s behaviors and style preferences and expectations.

Examples:

First meeting

If you have never met the person, you will not have the advantage of prior observation.

- Ask questions of other people who have worked with the person before to discover his or her behaviors and style preferences and expectations.

Examples:
**Application: Identifying Your Coworkers’ Styles**

Practice applying your style identification skills to people you work with.

**Purpose**

**Process**

1. Work individually.

2. Select up to six people you work with and identify each person’s style. Include at least two coworkers with whom you experience some working or relationship challenges. These should be relationships you want to improve.

3. Use the My World at a Glance style identification worksheet to accurately identify the style of each of your six coworkers. An example of a completed worksheet is on the next page.

   - For each person, determine assertiveness and responsiveness characteristics, and note behavioral indicators. Write the name or initials of each coworker in the appropriate quadrant.

   - Write your own name or initials in the quadrant where you have been profiled.
**My World at a Glance Example**

- Write each person’s name or initials in the appropriate quadrant (and/or record this information in the chart below).
- Write your name or initials in the appropriate quadrant (and/or record your Social Style below).

**My Social Style:**

<table>
<thead>
<tr>
<th>PERSON’S NAME: Lester Sommers</th>
<th>SOCIAL STYLE: Analytical</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td>Asks a lot of questions</td>
<td>Clear specific information</td>
</tr>
<tr>
<td>Fairly slow rate of speech</td>
<td>Time to think about it and make a decision</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
<tr>
<td>Sticks to business</td>
<td></td>
</tr>
<tr>
<td>Few gestures and facial expressions</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON’S NAME: Maria Barbosa</th>
<th>SOCIAL STYLE: Driver</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td>Leans forward and makes direct eye contact</td>
<td>Keep a fast pace to the way we do business</td>
</tr>
<tr>
<td>Fast pace</td>
<td>Focus on the end results</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
<tr>
<td>Gets down to business immediately</td>
<td>Don’t bog her down with a lot of details unless she asks for them</td>
</tr>
<tr>
<td>Not a lot of body language</td>
<td></td>
</tr>
</tbody>
</table>

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My World at a Glance

- Write each person’s name or initials in the appropriate quadrant (and/or record this information in the chart below).

- Write your name or initials in the appropriate quadrant (and/or record your Social Style below).

My Social Style:

<table>
<thead>
<tr>
<th>PERSON’S NAME:</th>
<th>SOCIAL STYLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON’S NAME:</th>
<th>SOCIAL STYLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON’S NAME:</th>
<th>SOCIAL STYLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
</tbody>
</table>
## Assertiveness Indicators

What behaviors did you observe?

## Responsiveness Indicators

What behaviors did you observe?

### Assertiveness

<table>
<thead>
<tr>
<th>Approach</th>
<th>Statements</th>
<th>Questions</th>
<th>Pace</th>
<th>Interruptions</th>
<th>Body Position</th>
<th>Volume</th>
<th>Eye Contact</th>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>Direct</td>
<td>Few</td>
<td>Many</td>
<td>Leans Forward</td>
<td>Louder</td>
<td>More</td>
<td>More Direct</td>
<td>Less Time</td>
</tr>
</tbody>
</table>

### Responsiveness

<table>
<thead>
<tr>
<th>Focus</th>
<th>Gestures</th>
<th>Tone</th>
<th>Feelings</th>
<th>Facial Expressions</th>
<th>Decision Making</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start with task and facts</td>
<td>Start with relationships and feelings</td>
<td>More and wider</td>
<td>Shares many</td>
<td>More</td>
<td>Subjective</td>
</tr>
</tbody>
</table>
Reflect on Style Expectations
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

REFLECT ON STYLE EXPECTATIONS
Overview: Reflect on Style Expectations

The Versatile Response

**Identify**
Identify the person’s Social Style.
“She or he is …”

**Reflect**
Based on the person’s Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs …”

**Modify**
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will …”

Purpose

Reflect on the expectations and preferences people of the different Social Styles have for those with whom they work and interact.

Process

- Describe the expectations and preferences for each of the four styles.
- Identify how these preferences apply to you on the job.
- Find out how some people perceive your versatility with them.

Payoff

Increased awareness of the different interpersonal expectations others have for you
Activity: The Style Exchange Report

Purpose

Identify the interpersonal needs and expectations of people based on their Social Style.

Process

1. Work in like-style teams.
2. Answer the questions on the Your Team worksheet on the next page.
3. Take 15 minutes to prepare a brief presentation for the rest of the class about your style’s interpersonal needs when working with others.
4. Use the Team 2, Team 3, and Team 4 worksheets on the following pages for taking notes during the presentations.
The Style Exchange Report: Your Team

Your Team’s Social Style: ___________________________

1. What are the strengths and weaknesses of your Social Style on the job?

2. What unique contribution does your style make to the organization?

3. What kind of environment helps you work using the strengths of your style?

4. What advice would you give others about working more effectively with your style?

5. What should others avoid doing when working with your style?

6. If the strengths of your style were to be expressed on a T-shirt, what slogan or picture would be on it?
The Style Exchange Report: Team 2

Social Style: ______________________________

1. What do people of this style see as their strengths and weaknesses on the job?

2. What unique contribution does this style make to the organization?

3. What kind of environment helps people work from the strengths of this style?

4. What advice do people of this style give others about working more effectively with this style?

5. What should others avoid doing when working with this style?

6. What did you learn about this style that surprised you?
The Style Exchange Report: Team 3

Social Style: ________________________________

1. What do people of this style see as their strengths and weaknesses on the job?

2. What unique contribution does this style make to the organization?

3. What kind of environment helps people work from the strengths of this style?

4. What advice do people of this style give others about working more effectively with this style?

5. What should others avoid doing when working with this style?

6. What did you learn about this style that surprised you?
The Style Exchange Report: Team 4

Social Style: ________________________________

1. What do people of this style see as their strengths and weaknesses on the job?

2. What unique contribution does this style make to the organization?

3. What kind of environment helps people work from the strengths of this style?

4. What advice do people of this style give others about working more effectively with this style?

5. What should others avoid doing when working with this style?

6. What did you learn about this style that surprised you?
**Versatility**

The ability to adapt one’s own behaviors to meet the concerns and expectations of others in order to create productive relationships.

---

**Conclusions about versatility**

- We’re all versatile to some degree in our communications with others.
- Some people are more versatile than others.
- Versatility is situational.
- All of us can improve our versatility.
- The more versatile we are, the greater is our ability to communicate effectively with others.
- Versatility is a choice.
- Relationship Tension and Task Tension will be at more effective levels if we are more versatile.
Reflect on Your Versatility

The versatility feedback you received is recorded on a scale similar to the one below:

<table>
<thead>
<tr>
<th>W</th>
<th>X</th>
<th>Y</th>
<th>Z</th>
</tr>
</thead>
</table>

**Lower Versatility**
- Uses same behaviors with everyone
- Stays in own comfort zone
- Prefers own way of working
- Focuses inward

**Higher Versatility**
- Uses different behaviors with different people
- Reaches out to others’ comfort zones
- Adapts to others’ ways of working
- Focuses outward

**High versatility skills**
- Recognizes signals that tension is increasing in an interaction
- Takes steps to reduce interpersonal tension in an interaction
- Adapts easily to different social situations
- Modifies own behavior to help others feel more comfortable in an interaction
**Reflect: How to Do It**

Your Modify strategy will be based on what you have learned about the expectations and preferences of the different styles.

Ask yourself these four questions:

1. What would this person expect of me?
2. What would I have to do to meet his or her expectations?
3. What do we share in common?
4. What are the differences between us?
### Summary of Style Preferences

<table>
<thead>
<tr>
<th>PRIMARY ASSET</th>
<th>ANALYTICAL</th>
<th>AMIABLE</th>
<th>DRIVER</th>
<th>EXPRESSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systematic</td>
<td>Supportive</td>
<td>Controlling</td>
<td>Energizing</td>
<td></td>
</tr>
<tr>
<td>Avoiding</td>
<td>Acquiescing</td>
<td>Autocratic</td>
<td>Attacking</td>
<td></td>
</tr>
<tr>
<td>Decide</td>
<td>Initiate</td>
<td>Listen</td>
<td>Check</td>
<td></td>
</tr>
<tr>
<td>Respect</td>
<td>Approval</td>
<td>Control</td>
<td>Recognition</td>
<td></td>
</tr>
<tr>
<td>Describes</td>
<td>Processes</td>
<td>Responds</td>
<td>Collaborates</td>
<td></td>
</tr>
<tr>
<td>Face</td>
<td>Relationships</td>
<td>Time</td>
<td>Effort</td>
<td></td>
</tr>
<tr>
<td>Accurate</td>
<td>Cooperative</td>
<td>Efficient</td>
<td>Interesting</td>
<td></td>
</tr>
<tr>
<td>Principles and thinking</td>
<td>Relationships and feelings</td>
<td>Conclusions and actions</td>
<td>Vision and intuition</td>
<td></td>
</tr>
<tr>
<td>How the problem is solved</td>
<td>Why the solution is the best</td>
<td>What the solution will do</td>
<td>Who else has used the solution</td>
<td></td>
</tr>
<tr>
<td>Evidence and service</td>
<td>Assurances and guarantees</td>
<td>Options and probabilities</td>
<td>Testimony and incentives</td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>Support</td>
<td>Results</td>
<td>Attention</td>
<td></td>
</tr>
</tbody>
</table>
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

MODIFY YOUR BEHAVIOR
Overview: Modify Your Behavior

The Versatile Response

Identify
Identify the person’s Social Style.
“She or he is …”

Reflect
Based on the person’s Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs …”

Modify
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will …”

Purpose
Learn how to adapt the way you work with other people in order to meet their style expectations and preferences.

Process
- Define an approach to adapting your behaviors and understand its impact on Versatility.
- Describe various strategies for the Modify step of the Versatile Response.
- Apply the Modify step to improve your relationship with one of your co-workers.

Payoff
The ability to create Modify strategies to use with people of different Social Styles
Versatility Is a Stretch!

Versatility

The ability to adapt one’s own behaviors to meet the concerns and expectations of others in order to create productive relationships.

How to stretch

The Modify step is the outward demonstration of versatility. When you modify your behaviors you are stretching beyond your comfort zone.

- Think about the way you need to increase your assertiveness or responsiveness.
  - Do you need to use more ask-assertive or more tell-assertive behaviors?
  - Do you need to use more task-responsive or more people-responsive behaviors?

- Always modify one dimension at a time, either assertiveness or responsiveness.

Remember, when you modify your behavior you make a temporary adaptation of your own behaviors. 
*You do not become the other person’s style.*
Stretching Beyond Your Comfort Zone

Increasing Task-Directed Responsiveness
- Talk about the task; emphasize facts.
- Demonstrate the logic behind your ideas.
- Acknowledge the person’s concerns about the use of time.
- Use fewer gestures and facial expressions.
- Avoid small talk.

Increasing Ask-Directed Assertiveness
- Ask for the person’s opinions first.
- Use a slower pace.
- Listen without interrupting.
- Pause more often.
- Ask for a commitment without pressure.

Increasing Tell-Directed Assertiveness
- Get to the point quickly.
- Volunteer information to the person.
- Be willing to express points of disagreement.
- Initiate conversation.
- Act quickly on decisions.

Increasing People-Directed Responsiveness
- Verbalize your feelings.
- Pay personal compliments.
- Be willing to discuss personal experiences both at work and outside the workplace.
- Use more gestures and facial expressions.
- Vary your tone of voice.

Remember

When you practice stretching often enough, it becomes easier to do.
Modify for a Purpose

Modifying your behavior is a purposeful activity. Always have a purpose or objective in mind when you prepare your Modify strategy.

Planning for the relationship

Examples of purpose statements:

- To develop more trust between LJ and me
- To clarify our expectations for how we will work together
- To resolve the outstanding issues between Terri and me
- To help Jorge accept me as a credible coach

Planning for a specific interaction

Examples of objective statements:

- Coaching for performance—to gain Jane’s agreement to improve her presentation skills
- Negotiating a deadline—to get the project team to delay implementation by two weeks
- Influencing a decision—to gain my manager’s agreement to assign me to the new project

Keep your purpose in mind

- When you are planning your Modify strategy
- When you are implementing your strategy
**Versatile Response Planner**

### IDENTIFY
- Write the person’s name or initials in the appropriate quadrant (and/or record this information in the space provided below).
- Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).

Other person’s name and Social Style:

My Social Style:

### PLANNING FOR THE RELATIONSHIP

**PURPOSE**
How would you like to improve this relationship? (Be as specific as possible.)

**REFLECT**
In general, what interpersonal expectations does this person have of you?

**MODIFY YOUR BEHAVIOR**
In general, what can you do to improve your versatility in your relationship with this person?

### PLANNING FOR A SPECIFIC INTERACTION

**SITUATION DESCRIPTION**

**OBJECTIVE**
What is your objective for this interaction?

**REFLECT**
Given the objective and the other person’s Social Style, what style expectations does he or she have of you?

**Cautions:** Given the style differences, what should you be cautious about in your behavior?
**Modify Your Behavior**

<table>
<thead>
<tr>
<th>Assertiveness Strategy:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase Ask-directed</td>
<td>Increase Tell-directed</td>
<td>Maintain</td>
</tr>
<tr>
<td>Increase People-directed</td>
<td>Increase Task-directed</td>
<td>Maintain</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Responsiveness Strategy:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase People-directed</td>
<td>Increase Task-directed</td>
<td>Maintain</td>
</tr>
</tbody>
</table>

**Before:**

**During:**

**Review**

After the interaction, assess your strategy and execution:

1. My observations of this person’s style are accurate.
   - Disagree
   - Agree
2. My Modify strategy improved the other person’s comfort.
   - Disagree
   - Agree
3. I achieved my objective for this interaction.
   - Disagree
   - Agree

What could you have done differently?

**After:** What will you do as follow-up?

**Social Style Summary**

<table>
<thead>
<tr>
<th></th>
<th>Analytical</th>
<th>Amiable</th>
<th>Driver</th>
<th>Expressive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Asset</strong></td>
<td>Systematic</td>
<td>Supportive</td>
<td>Controlling</td>
<td>Energizing</td>
</tr>
<tr>
<td><strong>Back-up Behavior</strong></td>
<td>Avoiding</td>
<td>Acquiescing</td>
<td>Autocratic</td>
<td>Attacking</td>
</tr>
<tr>
<td><strong>For Growth, Needs To</strong></td>
<td>Decide</td>
<td>Initiate</td>
<td>Listen</td>
<td>Check</td>
</tr>
<tr>
<td><strong>Measure of Personal Value</strong></td>
<td>Respect</td>
<td>Approval</td>
<td>Control</td>
<td>Recognition</td>
</tr>
<tr>
<td><strong>Needs a Climate That</strong></td>
<td>Describes</td>
<td>Processes</td>
<td>Responds</td>
<td>Collaborates</td>
</tr>
<tr>
<td><strong>Let Them Save</strong></td>
<td>Face</td>
<td>Relationships</td>
<td>Time</td>
<td>Effort</td>
</tr>
<tr>
<td><strong>Make an Effort to Be</strong></td>
<td>Accurate</td>
<td>Cooperative</td>
<td>Efficient</td>
<td>Interesting</td>
</tr>
<tr>
<td><strong>Support Their</strong></td>
<td>Principles and thinking</td>
<td>Relationships and feelings</td>
<td>Conclusions and actions</td>
<td>Vision and intuition</td>
</tr>
<tr>
<td><strong>Stress Benefits That Answer</strong></td>
<td>How the problem is solved</td>
<td>Why the solution is the best</td>
<td>What the solution will do</td>
<td>Who else has used the solution</td>
</tr>
<tr>
<td><strong>For Decisions Give Them</strong></td>
<td>Evidence and service</td>
<td>Assurances and guarantees</td>
<td>Options and probabilities</td>
<td>Testimony and incentives</td>
</tr>
<tr>
<td><strong>Follow up with</strong></td>
<td>Service</td>
<td>Support</td>
<td>Results</td>
<td>Attention</td>
</tr>
</tbody>
</table>
Application: Planning for the Relationship

The Versatile Response

Identify
Identify the person’s Social Style.
“She or he is …”

Reflect
Based on the person’s Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs …”

Modify
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will …”

Purpose
Use the Reflect and Modify steps in planning for your relationship with a coworker.

Process
1. Work individually on this application activity.
2. Complete the Identify and Planning for the Relationship sections of the Versatile Response Planner for one of your coworkers. There is an example on the next page.
3. Get in pairs and share your conclusions with your partner. Test your thinking for your plan, and offer advice to your partner for his or her plan.
### Example: Planning for the Relationship

**IDENTIFY**

- Write the person’s name or initials in the appropriate quadrant (and/or record this information in the space provided below).
- Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).

Other person’s name and Social Style:

My Social Style:

<table>
<thead>
<tr>
<th>Task</th>
<th>People</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical</td>
<td>Driver</td>
</tr>
<tr>
<td>Amiable</td>
<td>Expressive</td>
</tr>
</tbody>
</table>

**PLANNING FOR THE RELATIONSHIP**

**PURPOSE**

How would you like to improve this relationship? (Be as specific as possible.)

To get LP to trust me more

**REFLECT**

In general, what interpersonal expectations does this person have of you?

- Needs personal recognition for ideas and actions
- Wants to get to know me as a person

**MODIFY YOUR BEHAVIOR**

In general, what can you do to improve your versatility in your relationship with this person?

- Acknowledge LP’s ideas and share my ideas
- Pay attention to LP’s personal comments
- Volunteer information about myself
Suggestions to Help You Modify

The following tips for helping you modify your style come from the successful experiences of some of Wilson Learning’s past participants.

From Analyticals

To modify for Drivers, Michael suggests:

*When I write an e-mail, letter, or memo, I write it the way I normally do, then invert it by putting the last paragraph or sentence first and the first last—put the recommendation/suggestion up front, followed by the analysis.*

To modify for Drivers, Thomas suggests:

*When I schedule a meeting with a Driver, I always arrive on time or early and plan on finishing early.*

To modify for people-directed styles, Barb suggests:

*When writing an e-mail, memo, or notes for a call, along with my spell-check I do a “style check” and make sure I started with a “how are you” or “hope you are well” phrase.*

From Drivers

To modify for ask-assertive styles, Trey suggests:

*During a conversation with an Amiable or an Analytical, I repeat to myself “One mouth, two ears. . . . One mouth, two ears” to remind me I need to listen twice as much as I talk with Amiables and Analyticals.*

To modify for Analyticals, Steve suggests:

*During a conversation with an Analytical, I will silently count to five. This seems to provide enough time to see if they are really done, or just thinking about what to say next.*
From Expressives

To modify to ask-assertive styles, Debbie suggests:

Before going into a meeting, I repeat to myself three times, “Don’t interrupt, don’t interrupt, don’t interrupt.” This helps me remember to give Amiables and Analyticals time to complete their thoughts.

To modify for Drivers, Peter suggests:

I think of golf! The Driver is the first big hit . . . you had better make it good and straight.

From Amiables

To modify for the different styles, Tony suggests:

When working with Drivers, I have learned to be more direct and voice my opinions before being asked for them.

When working with Analyticals, I have learned to keep my personal discussions to a minimum and not to ask too much personal information of the Analytical.

When working with Expressives, I have learned to mirror their enthusiasm and excitement for a project or idea.

When working with other Amiables, I have learned the value of revealing my personal information and asking the other Amiable for his or her personal information.

For all styles

Paul suggests:

During a meeting, when I am asked a question, the first words out of my mouth are linked to style:

- To Analyticals I say, “Good question. . . .”
- To Drivers I give a clear “Yes” or “No.”
- To Expressives I say, “That is insightful.”
- To Amiables I say, “Thanks for asking that question.”
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

MANAGING STYLES IN CONFLICT
Overview: Managing Styles in Conflict

The Versatile Response

Identify
Identify the person’s back-up behavior.
“She or he is …”

Reflect
Based on the person’s back-up behavior, Reflect on and describe what she or he needs from you.
“So she or he needs …”

Modify
Decide how to Modify your behaviors to help the person manage her or his stress.
“Therefore I will …”

Purpose
Develop skills for dealing with other people when they are under stress.

Process
- Identify how the different styles react under tension or stress.
- Reflect on the needs of others when they are under tension.
- Develop strategies for managing your own stress.
- Learn and practice strategies for dealing with others under tension.
- Practice the Modify strategy you have developed for a coworker.

Payoff
Ability to deal more effectively with others who are experiencing tension in the workplace.
Activity: How Do I Respond to Stress?

Purpose

Describe the different reactions people have when under stress.

Process

1. Individually, answer these questions:
   - What gets you upset, mad, angry, and frustrated?
   - What do you do when you get upset, mad, angry, and frustrated? (What would other people see, hear, and observe?)
   - What are the consequences of this to the task and to the relationship?

2. Discuss your responses in your like-style groups.

3. Then, take notes about what the other groups say in the quadrants of the Social Style matrix on the next page.
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK
MANAGING STYLES IN CONFLICT

Analytical  

Driver

Amiable  

Expressive
Video: Back-Up Behaviors

Watch the four videos and write the names of the four back-up behaviors and the characteristics of each in the appropriate quadrant.
Z Patterns: When Tension Increases

**Analytical Z Pattern**
- Avoiding
- Autocratic
- Acquiescing
- Attacking

**Driver Z Pattern**
- Avoiding
- Autocratic
- Acquiescing
- Attacking

**Amiable Z Pattern**
- Avoiding
- Autocratic
- Acquiescing
- Attacking

**Expressive Z Pattern**
- Avoiding
- Autocratic
- Acquiescing
- Attacking
**Solutions to Back-Up Behavior—You**

**Purpose**
Explore your own experiences with back-up behavior.

**Process**
1. Answer the questions below in your like-style groups; be prepared to share your responses with the large group. Write your response to the last question in your style’s quadrant at the bottom of the page.
   - What can you do to prevent yourself from behaving the way you normally do when you are under stress?
   - When you find yourself in back-up, what can you do to minimize the intensity and duration of it?
   - What is it you want/need from other people when you are in your back-up style?

2. Take notes in the quadrants of the matrix about what the other groups say about their styles’ wants/needs when in back-up.
**Solutions to Fight Behavior: LS-CPA**

When dealing with Fight behaviors, it is not difficult to engage in a conversation because the person wants to express his or her thoughts and feelings about the situation. You allow the person to vent when you **Listen** and **Share** to **Address the Tension** and then **Address the Problem**.

<table>
<thead>
<tr>
<th>Address the Tension</th>
<th><strong>Listen</strong></th>
<th>Listen for the feelings as well as the facts. Use your self-management skills to avoid going into back-up.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Share</strong></td>
<td>Describe your understanding of the facts and feelings. Ask checking questions to verify accuracy and agreement.</td>
</tr>
<tr>
<td>Address the Problem</td>
<td><strong>Clarify</strong></td>
<td>Uncover the real issues by asking questions and verifying sources of tension.</td>
</tr>
<tr>
<td></td>
<td><strong>Problem Solve</strong></td>
<td>Work with the person to build solutions that address sources of tension.</td>
</tr>
<tr>
<td></td>
<td><strong>Ask for Action</strong></td>
<td>Reach agreement with the person on the actions you will both take to address the issues.</td>
</tr>
</tbody>
</table>
**Video: Solutions to Fight Behavior**

Watch the video and answer the following questions:

1. What type of Fight back-up behavior was demonstrated in this situation?

2. How did the person manage his or her own tension?

3. In the chart below, describe what the person said and did to use LS-CPA.

<table>
<thead>
<tr>
<th>STEP</th>
<th>BEHAVIOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>L</td>
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<td>S</td>
<td></td>
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<td>C</td>
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<tr>
<td>P</td>
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<tr>
<td>A</td>
<td></td>
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</tbody>
</table>
Solutions to Flight Behavior: SL-CPA

The challenge of Flight behaviors is in getting people to communicate. When people are in Flight back-up, they are reluctant to talk because they perceive that there will be negative consequences if they do. You can draw out a person in Flight back-up when you Share and Listen to Address the Tension and then Address the Problem.

<table>
<thead>
<tr>
<th>Address the Tension</th>
<th>Share</th>
<th>Describe your understanding of the facts and feelings. Ask checking questions to verify accuracy and agreement.</th>
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Video: Solutions to Flight Behavior

Watch the video and answer the following questions:

1. What type of Flight back-up behavior was demonstrated in this situation?

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3. In the chart below, describe what the person said and did to use SL-CPA.

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<tr>
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<tr>
<td>S</td>
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<tr>
<td>P</td>
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</tr>
<tr>
<td>A</td>
<td></td>
</tr>
</tbody>
</table>
**Application: Managing Back-Up Behavior**

**The Versatile Response**

**Identify**  
Identify the person’s back-up behavior.  
“She or he is …”

**Reflect**  
Based on the person’s back-up behavior, Reflect on and describe what she or he needs from you.  
“So she or he needs …”

**Modify**  
Decide how to Modify your behaviors to help the person manage her or his stress.  
“Therefore I will …”

---

**Purpose**

Design and practice a strategy for dealing with a coworker under tension.

**Process**

1. Think of a current or past situation where a coworker exhibited back-up behavior. Analyze the situation using the Managing Back-Up Behavior Worksheet on the next page.

2. Design a strategy for managing this situation, again using the worksheet.

3. After you have designed your strategy, practice it with a partner.

4. After you have practiced, discuss how it went:
   - What specific things did your partner do to demonstrate LS-CPA or SL-CPA?
   - What effect did this have on the interaction?
   - What suggestions for improvement do you have?
Managing Back-Up Behavior Worksheet

Person’s Name:
Situation Description:

---

**Identify**

This person is in:  [ ] Fight back-up  [ ] Flight back-up

What behaviors led you to this conclusion?

---

**Reflect**

What triggers the other person’s back-up behavior?

What does this person need most from you when he or she is in this type of back-up?

---

**Modify**

What can you do to manage your own tension?

How can you use LS-CPA or SL-CPA to manage the other person’s tension?

What do you need to avoid doing with this person?
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

MASTERING VERSATILITY
Activity: Experiencing Versatility

Purpose
Experience how versatility impacts your ability to complete a task.

Process
1. Work together in your assigned group.
2. Create a list of recommendations for one of the following topics:
   - What is the best way to structure a team of people working together on a large project?
   - What is the most important method for improving individual effectiveness in an organization?
3. Work from the strengths of your Social Style. Draw on your own experiences and conclusions when discussing your ideas with your group.
Overview: Mastering Versatility

The Versatile Response

Identify
Identify the person’s Social Style.
“She or he is …”

Reflect
Based on the person's Social Style, Reflect on and describe her or his expectations for interactions with you.
“So she or he needs …”

Modify
Decide how to Modify your behaviors to maximize your effectiveness.
“Therefore I will …”

Purpose
Develop enhanced strategies and skills for using the Modify step in the workplace.

Process

- Identify four behavioral tactics for the Modify step of the Versatile Response.
- Apply these tactics to adapt your behavior when performing specific work-related tasks with people of different Social Styles.
- Describe approaches for modifying distance communications to the four styles.
- Apply the Modify step to a work-related task in a situation of your choice.
- Identify the next steps you can take in using versatility with the people you work with.

Payoff
Improved ability to work effectively with people of different styles and the ability to create a plan for applying your newly developed versatility skills
Versatility

The ability to adapt one’s own behaviors to meet the concerns and expectations of others in order to create productive relationships

- Versatility is important for improved communication.
- Greater versatility minimizes Relationship Tension and maximizes your effectiveness on the job.
- Versatility is a choice that you make. Consider the following questions when making the decision about whether to be versatile:
  - Do I need this relationship to work so that I can achieve my results?
  - What will be the benefits if I improve this relationship?
  - What will be the risks if I do not improve this relationship?
  - Is this the best time for me to work on my versatility with this person? If not, when?
- There are personal benefits to versatility such as greater ability to influence others, more receptivity to your ideas and concerns, and, potentially, reciprocal versatility.
Versatility Is a Stretch!

Versatility

The ability to adapt one’s own behaviors to meet the concerns and expectations of others in order to create productive relationships.

How to stretch

The Modify step is the outward demonstration of versatility. When you modify your behaviors you are stretching beyond your comfort zone.

- Think about the way you need to increase your assertiveness or responsiveness.
  - Do you need to use more ask-assertive or more tell-assertive behaviors?
  - Do you need to use more task-responsive or more people-responsive behaviors?

- Always modify one dimension at a time, either assertiveness or responsiveness.

Remember, when you modify your behavior you make a temporary adaptation of your own behaviors. 

You do not become the other person’s style.
Stretching Beyond Your Comfort Zone

Increasing Task-Directed Responsiveness
- Talk about the task; emphasize facts.
- Demonstrate the logic behind your ideas.
- Acknowledge the person’s concerns about the use of time.
- Use fewer gestures and facial expressions.
- Avoid small talk.

Increasing Ask-Directed Assertiveness
- Ask for the person’s opinions first.
- Use a slower pace.
- Listen without interrupting.
- Pause more often.
- Ask for a commitment without pressure.

Increasing Tell-Directed Assertiveness
- Get to the point quickly.
- Volunteer information to the person.
- Be willing to express points of disagreement.
- Initiate conversation.
- Act quickly on decisions.

Increasing People-Directed Responsiveness
- Verbalize your feelings.
- Pay personal compliments.
- Be willing to discuss personal experiences both at work and outside the workplace.
- Use more gestures and facial expressions.
- Vary your tone of voice.

Remember
When you practice stretching often enough, it becomes easier to do.
**Modify for a Purpose**

Modifying your behavior is a purposeful activity. Always have a purpose or goal in mind when you prepare your Modify strategy.

> When your purpose is an expression of your positive intent, it will help you demonstrate greater versatility.

---

### Planning for the relationship

Examples:
- To develop more trust between LJ and me
- To clarify our expectations for how we will work together
- To resolve the outstanding issues between Terri and me
- To help Jorge accept me as a credible coach

### Planning for a specific interaction

Examples:
- Coaching for performance—to gain Jane’s agreement to improve her presentation skills
- Negotiating a deadline—to get the project team to delay implementation by two weeks
- Influencing a decision—to gain my manager’s agreement to assign me to the new project

### Keep your purpose in mind

- When you are planning your Modify strategy
- When you are implementing your strategy
Modify Tactics

Making a temporary adaptation of your own behaviors

The choices you make about . . .

- What you communicate
- How you communicate it

Pace
The speed of your speech and physical movements

Voice
The use of emphasis, tone, and volume

Body Language
The use of gestures, facial expression, and interpersonal distance

Focus/Content
The discussion topics and priorities
Activity: The Modify Gallery Walk

Purpose

Describe key actions for the four Modify tactics of pace, voice, body language, and focus for each style.

Process

1. Work together in like-style groups.

2. Discuss and write on a flipchart specific actions for modifying your behavior for each of the three styles other than your own. Keep in mind the four behavior categories of pace, voice, body language, and focus.

3. Post your flipchart on the wall that is assigned to you by the facilitator.

4. When the facilitator instructs you, walk around and look at what the other teams have written about how they will modify their behavior for your style. For each team's suggestions:
   - Indicate with “Yes” or “!” those that are appropriate to your style’s expectations.
   - Put a question mark by those that you don’t understand.
   - Indicate with “No” those that are not appropriate to your style’s expectations and explain why.
   - Add other expectations for your style that have not yet been noted.

5. When you return to your own chart, review the annotations made by the other styles on your group’s flipchart. Identify those annotations that you would like clarified. Take notes on the worksheet on the next page.

6. Identify the top three insights that you gained from this activity.
The Modify Gallery Walk Worksheet
Mastering Versatility Practice

Purpose

Practice developing a Modify strategy for a specific task.

Process

Set Up

1. Working in a team, develop a Modify strategy for a specific task. Two people from your team will demonstrate this strategy.

2. You will work on one of the Versatility Scenarios on the following pages.

3. Select someone from your team to demonstrate the Modify strategy.

4. Choose the Social Style of the person your team will be adapting to.
   - Select someone from your team with that style to play this person.
   - The style should be opposite or different from that of the person who will demonstrate the Modify strategy.

Plan

5. Prepare for the demonstration. Use the actions you recorded during the Modify Gallery Walk activity and other suggestions you will find in the Toolkit at the back of this book.

Use the Planning for a Specific Interaction section of a Versatile Response Planner to help you design your Modify strategy. See the example that follows the Versatility Scenarios.

6. Design your strategy to include actions you will take before, during, and after the meeting.

Practice

7. When the facilitator asks, demonstrate your strategy.

8. As you watch other teams’ presentations, observe the behaviors they demonstrate. Record your observations for each presentation on an Observation Worksheet. Be prepared to discuss the effectiveness of each strategy and how it is demonstrated and to provide suggestions for additional effectiveness.
**Versatility Scenarios**

*If you are a manager, address the “For a manager” question; if you are an individual contributor, address the “For an individual contributor” question.*

---

**Discussing an expectation**

A work unit has been performing below expectations. A new manager has just been appointed to the group. The new manager is meeting individually with each person to set expectations.

- For a manager:
  Which Modify strategy will you use with the individual contributor to gain his or her commitment to your new expectations?

- For an individual contributor:
  Which Modify strategy will you use to discuss expectations?

---

**Influencing a decision**

A department is about to begin the redesign of a key work process. The manager will pick the people for the project team. It is year-end and everyone is overloaded with work.

- For a manager:
  Which Modify strategy will you use with the individual contributor to gain his or her commitment to take on this additional task?

- For an individual contributor:
  Which Modify strategy will you use with your manager to get him or her to put you on this project, a responsibility you really want?

---

**Discussing a performance problem**

A manager and direct report are meeting to discuss a performance problem. The direct report has demonstrated a lack of “people skills” in his or her interactions with others in the department. This has created some tension and complaints from others in the department. Both the manager and the direct report know that this problem needs to be resolved.

- For a manager:
  Which Modify strategy will you use with your direct report to discuss and resolve the problem?

- For an individual contributor:
  Which Modify strategy will you use with your manager to discuss and resolve the problem?
Motivating someone

Two people are working together on a very difficult project for an important client. The client is very demanding at times, to the point of being unreasonable. However, the salesperson in charge of the account has made it very clear to both of you that failure is not an option. Your colleague is very dispirited and is even thinking of resigning. You have decided to talk to your colleague about the situation.

- For a manager:
  If this were your direct report, how would you use a Modify strategy to motivate him or her?

- For an individual contributor:
  How would you use a Modify strategy to motivate your colleague?

Negotiating a change

The department is working on a key project that requires important data from an individual contributor. At the last minute, this person ran into an unexpected problem that has prevented him or her from completing the task. Other parts of the project will be seriously affected by this delay.

- For a manager:
  Which Modify strategy would you use to renegotiate this expectation with the individual contributor?

- For an individual contributor:
  Which Modify strategy would you use to renegotiate this expectation with your manager?

Gaining agreement

Two managers are meeting to discuss sharing the time of an individual contributor. One manager feels that he or she needs about 70 percent of this person’s time because of some challenging goals that have been set for the manager’s work unit.

- For a manager:
  Which Modify strategy would you use to gain your peer’s agreement to 70 percent of the individual contributor’s time?

- For an individual contributor:
  Which Modify strategy would you use to get your manager to agree to let you spend 70 percent of your time working for another manager?
### Mastering Versatility Practice Example

<table>
<thead>
<tr>
<th>IDENTIFY</th>
<th>![Social Style Diagram]</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Write the person’s name or initials in the appropriate quadrant (and/or record this information in the space provided below).</td>
<td></td>
</tr>
<tr>
<td>- Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).</td>
<td></td>
</tr>
</tbody>
</table>

Other person’s name and Social Style:  
My Social Style:

<table>
<thead>
<tr>
<th>PLANNING FOR A SPECIFIC INTERACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SITUATION DESCRIPTION</strong></td>
</tr>
<tr>
<td>Redesign of a key work process. My manager will pick the people to be on the project team. This work process affects my job, so I want to be on the team.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OBJECTIVE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your objective for this interaction?</td>
</tr>
<tr>
<td>My manager agrees to put me on the team</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>REFLECT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Given the objective and the other person’s Social Style, what style expectations does he or she have of you?</td>
</tr>
<tr>
<td>My manager will want a logical argument, time to make a decision, advance notice of the topic and some things to think about, and sufficient time to discuss. Then he'll consider the decision.</td>
</tr>
<tr>
<td><strong>Cautions:</strong> Given the style differences, what should you be cautious about in your behavior?</td>
</tr>
<tr>
<td>I need to be careful about my tendencies to push my argument, become impatient, take questions as personal attacks, and want a decision on the spot.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>MODIFY YOUR BEHAVIOR</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Strategy:</strong></td>
</tr>
<tr>
<td>- Increase Ask-directed</td>
</tr>
<tr>
<td>- □ Increase Tell-directed</td>
</tr>
<tr>
<td>□ Maintain</td>
</tr>
<tr>
<td><strong>Responsiveness Strategy:</strong></td>
</tr>
<tr>
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</tr>
<tr>
<td>☒ Increase Task-directed</td>
</tr>
<tr>
<td>□ Maintain</td>
</tr>
</tbody>
</table>

Before: Send an e-mail to request time, topic, and things to think about, back-up data  

During: Slow my pace, ask more questions, and pause after asking; invite my manager to ask me questions, listen to the full response, and don't interrupt; stick to the facts, get down to business without a lot of chitchat; structure the agenda to support my logical argument and stick to it.
Observation Worksheet

Use this worksheet to take notes and discuss the role-play.

<table>
<thead>
<tr>
<th>IDENTIFY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write the name or initials of each role-player in the appropriate quadrant.</td>
</tr>
</tbody>
</table>

Versatility Scenario:

What behaviors did you see that demonstrate effective versatility?

What impact did these behaviors have on the relationship and the task?

What suggestions for improvement would you make?
Observation Worksheet

Use this worksheet to take notes and discuss the role-play.

**IDENTIFY**

- Write the name or initials of each role-player in the appropriate quadrant.

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<th>TASK</th>
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<tbody>
<tr>
<td></td>
<td>Analytical</td>
</tr>
<tr>
<td></td>
<td>Amiable</td>
</tr>
<tr>
<td></td>
<td>ASK</td>
</tr>
<tr>
<td></td>
<td>PEOPLE</td>
</tr>
</tbody>
</table>

**Versatility Scenario:**

What behaviors did you see that demonstrate effective versatility?

What impact did these behaviors have on the relationship and the task?

What suggestions for improvement would you make?
Modify at a Distance—Voice Mail

Analyticals

- Keep it short.
- Provide a brief introduction.
- Itemize your points in a logical progression.
- Use a soft or quiet voice with a level tone.
- Take a more formal approach.

Expressives

- State clearly at the beginning who is calling, the reason for your call, and your telephone number.
- Use a warm and enthusiastic greeting.
- Keep a quick pace.
- Avoid long, detailed messages.

Amiables

- Use a warm and friendly tone.
- Provide personal contact information.
- Take an informal, conversational approach.

Drivers

- State the purpose of your call at the very beginning.
- Keep the message short and to the point.
- Emphasize actions to be taken (or results you want or have achieved).
Modify at a Distance—E-mail

Analyticals
- Stick to facts and data.
- Check for spelling and grammar.
- Provide attachments for more detail.

Expressives
- Personalize your message.
- Change color or font.
- Bullet-point details, but keep them few in number.
- Ask for their ideas.
- Exclamation points matter.

Amiables
- Keep your message conversational, but short.
- Ask how they are doing.
- Adopt a friendly tone.
- Ask for their help.
- Use emoticons.

Drivers
- Keep the message short and to the point.
- Ask direct, short questions.
- Be accurate.
- Avoid an informal approach; be professional.
- Don't worry about a greeting.
Modify at a Distance—Instant and Text Messaging

Analyticals
- Be concise.
- Ask if they are free to communicate.
- Avoid frivolous messages.

Expressives
- Jump in and respond to their messages.
- Use emoticons and exclamation points.
- Engage in longer conversations.
- Take an informal approach.

Amiables
- Use a friendly greeting.
- Ask how they are doing.
- Ask if this is a convenient time.

Drivers
- Use only short messages.
- Respond immediately.
- Stick to business.
- Use this method for setting up meetings, phone calls, etc.
- Avoid overuse of this communication method.
Application: Planning for a Specific Interaction

The Versatile Response

**Identify**

Identify the person’s Social Style.

“She/he is …”

**Reflect**

Based on the person’s Social Style, *Reflect* on and describe their expectations for interactions with you.

“So she/he needs …”

**Modify**

Decide how to *Modify* your behaviors to maximize your effectiveness.

“Therefore I will …”

**Purpose**

Develop and discuss a Versatile Response strategy for a specific interaction.

**Process**

1. Working individually, select an upcoming specific interaction with a coworker. Complete the Planning for a Specific Interaction section of a Versatile Response Planner for the coworker.

   Refer back to the earlier example planner to guide your work.

2. Form a group with two other participants. Discuss your strategy and ask your partners for feedback as instructed by the facilitator.
Commitment to Versatility

Describe how you will apply your versatility skills with others by answering the questions below.

1. Which skills, tools, and concepts did you find useful in this workshop?

2. What will you do to implement the Versatile Response strategy you designed during the workshop?

3. What can you do to mentor and support others in your organization to increase their versatility?
BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK

TOOLKIT
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Overview

Purpose
The purpose of this toolkit is to provide you with a set of easy-to-use tools, or job aids, that can be used on the job to enhance your ability to build relationship versatility, which will help you obtain better results.

Process
Review this toolkit after completing Building Relationship Versatility. Make copies of the tools that will be most appropriate for your situation and most helpful for your own development.

The toolkit contains several sections:

- Plan Tools—These tools can be used to improve working relationships in general or to plan for specific interactions and objectives.

- Evaluate Tool—The Versatile Response Behavior Checklists will help you evaluate your use of versatility skills and determine which skills to enhance or reinforce. Use the checklists as a pre-interaction reminder or immediately after an interaction to evaluate performance.

- Practice Tool—This section contains practice, reflection, and improvement activities designed to help you build specific versatility skills and transfer your learning back to the job.

- Learning Resources—This section provides specific information for each phase of the Versatile Response process (Identify/Reflect/Modify) that will help you apply versatility skills with different individuals.

- Additional Information—This section contains information on accessing online resources.

Payoff
Using the resources in this toolkit will enable you to build effective relationships that lead to improved business results.
Plan Tools

Purpose

Plan tools help you plan to improve working relationships in general or to plan for specific interactions.

Process

- **Versatile Response Planner:** The Versatile Response Planner is a tool for planning for any type of interaction. The tool guides you through identifying the Social Style of an individual, reflecting on his or her expectations for comfort, and planning for modifying your behaviors to increase the other person’s comfort.

- **My World at a Glance Worksheet:** Use the My World at a Glance worksheet to identify styles of a group of individuals (e.g., your team, customers, stakeholders) and see at a glance the style composition of the group.

- **Managing Back-Up Behavior Worksheet:** Use this tool to evaluate what kind of back-up behavior you are seeing in an individual and to plan how to address the behavior constructively.

Payoff

Using these tools will enable you to apply versatility skills more effectively, which will result in mutually productive relationships.
Versatile Response Planner

### The Versatile Response

**Identify**

Identify the person’s Social Style.

“She or he is . . .”

**Reflect**

Based on the person’s Social Style, reflect on and describe her or his expectations for interactions with you.

“So she or he needs . . .”

**Modify**

Decide how to modify your behaviors to maximize your effectiveness.

“Therefore I will . . .”

The Versatile Response Planner is a tool for you to use when planning for a relationship or an interaction. It contains the following sections:

1. **Identify**: Determine the other person’s Social Style.

2. **Planning for the Relationship and Planning for a Specific Interaction**:
   - **Purpose/Objective**: Identify how you would like to improve the relationship or what your objective is for the interaction.
   - **Reflect**: Describe the interpersonal expectations of the other person.
   - **Modify**: Design a Modify strategy.
   - **Review**: Evaluate your effectiveness.

3. **Social Style Summary**: Use this chart to review characteristics of each Social Style.
Versatile Response Planner

**IDENTIFY**
- Write the person’s name or initials in the appropriate quadrant (and/or record this information in the space provided below).
- Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).

Other person’s name and Social Style:
My Social Style:

**PLANNING FOR THE RELATIONSHIP**

**PURPOSE**
How would you like to improve this relationship? (Be as specific as possible.)

**REFLECT**
In general, what interpersonal expectations does this person have of you?

**MODIFY YOUR BEHAVIOR**
In general, what can you do to improve your versatility in your relationship with this person?

**PLANNING FOR A SPECIFIC INTERACTION**

**SITUATION DESCRIPTION**

**OBJECTIVE**
What is your objective for this interaction?

**REFLECT**
Given the objective and the other person’s Social Style, what style expectations does he or she have of you?

**Cautions:** Given the style differences, what should you be cautious about in your behavior?
**BUILDING RELATIONSHIP VERSATILITY: SOCIAL STYLES AT WORK**

**TOOLKIT: PLAN TOOLS**

## MODIFY YOUR BEHAVIOR

<table>
<thead>
<tr>
<th>Assertiveness Strategy:</th>
<th>Increase Ask-directed</th>
<th>Increase Tell-directed</th>
<th>Maintain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsiveness Strategy:</td>
<td>Increase People-directed</td>
<td>Increase Task-directed</td>
<td>Maintain</td>
</tr>
</tbody>
</table>

### Before: During:

### REVIEW

After the interaction, assess your strategy and execution:

1. My observations of this person’s style are accurate.  
2. My Modify strategy improved the other person’s comfort.  
3. I achieved my objective for this interaction.

What could you have done differently?

**After:** What will you do as follow-up?

## SOCIAL STYLE SUMMARY

<table>
<thead>
<tr>
<th></th>
<th>ANALYTICAL</th>
<th>AMIABLE</th>
<th>DRIVER</th>
<th>EXPRESSIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRIMARY ASSET</strong></td>
<td>Systematic</td>
<td>Supportive</td>
<td>Controlling</td>
<td>Energizing</td>
</tr>
<tr>
<td><strong>BACK-up BEHAVIOR</strong></td>
<td>Avoiding</td>
<td>Acquiescing</td>
<td>Autocratic</td>
<td>Attacking</td>
</tr>
<tr>
<td><strong>FOR GROWTH, NEEDS TO</strong></td>
<td>Decide</td>
<td>Initiate</td>
<td>Listen</td>
<td>Check</td>
</tr>
<tr>
<td><strong>MEASURE OF PERSONAL VALUE</strong></td>
<td>Respect</td>
<td>Approval</td>
<td>Control</td>
<td>Recognition</td>
</tr>
<tr>
<td><strong>NEEDS A CLIMATE THAT</strong></td>
<td>Describes</td>
<td>Processes</td>
<td>Responds</td>
<td>Collaborates</td>
</tr>
<tr>
<td><strong>LET THEM SAVE</strong></td>
<td>Face</td>
<td>Relationships</td>
<td>Time</td>
<td>Effort</td>
</tr>
<tr>
<td><strong>MAKE AN EFFORT TO BE</strong></td>
<td>Accurate</td>
<td>Cooperative</td>
<td>Efficient</td>
<td>Interesting</td>
</tr>
<tr>
<td><strong>SUPPORT THEIR</strong></td>
<td>Principles and thinking</td>
<td>Relationships and feelings</td>
<td>Conclusions and actions</td>
<td>Vision and intuition</td>
</tr>
<tr>
<td><strong>STRESS BENEFITS THAT ANSWER</strong></td>
<td>How the problem is solved</td>
<td>Why the solution is the best</td>
<td>What the solution will do</td>
<td>Who else has used the solution</td>
</tr>
<tr>
<td><strong>FOR DECISIONS GIVE THEM</strong></td>
<td>Evidence and service</td>
<td>Assurances and guarantees</td>
<td>Options and probabilities</td>
<td>Testimony and incentives</td>
</tr>
<tr>
<td><strong>FOLLOW UP WITH</strong></td>
<td>Service</td>
<td>Support</td>
<td>Results</td>
<td>Attention</td>
</tr>
</tbody>
</table>
**My World at a Glance Worksheet**

- Write each person’s name or initials in the appropriate quadrant (and/or record this information in the chart below).

- Write your name or initials in the appropriate quadrant (and/or record your Social Style below).

  **My Social Style:**

<table>
<thead>
<tr>
<th>PERSON’S NAME:</th>
<th>SOCIAL STYLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assertiveness Indicators:</strong> What behaviors did you observe?</td>
<td><strong>Style Needs:</strong> What does this person need from me?</td>
</tr>
<tr>
<td><strong>Responsiveness Indicators:</strong> What behaviors did you observe?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PERSON’S NAME:</th>
<th>SOCIAL STYLE:</th>
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### Building Relationship Versatility: Social Styles at Work

#### Toolkit: Plan Tools

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<td></td>
</tr>
</tbody>
</table>

### Assertiveness

<table>
<thead>
<tr>
<th>Approach</th>
<th>Tell Directed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indirect</td>
<td>Direct</td>
</tr>
<tr>
<td>Conditional</td>
<td>Declarative</td>
</tr>
<tr>
<td>More</td>
<td>Fewer</td>
</tr>
<tr>
<td>Deliberate</td>
<td>Rapid</td>
</tr>
<tr>
<td>Few</td>
<td>Many</td>
</tr>
<tr>
<td>Leans Back</td>
<td>Leans Forward</td>
</tr>
<tr>
<td>Quieter</td>
<td>Louder</td>
</tr>
<tr>
<td>Less Direct</td>
<td>More Direct</td>
</tr>
<tr>
<td>More Time</td>
<td>Less Time</td>
</tr>
</tbody>
</table>

### Responsiveness

<table>
<thead>
<tr>
<th>Task Directed</th>
<th>People Directed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start with task and facts</td>
<td>Start with relationships and feelings</td>
</tr>
<tr>
<td>Fewer and smaller</td>
<td>More and wider</td>
</tr>
<tr>
<td>Consistent</td>
<td>Varied</td>
</tr>
<tr>
<td>Shares few</td>
<td>Shares many</td>
</tr>
<tr>
<td>Fewer</td>
<td>More</td>
</tr>
<tr>
<td>Objective</td>
<td>Subjective</td>
</tr>
</tbody>
</table>
Managing Back-Up Behavior Worksheet

Person’s Name:
Situation Description:

Identify

This person is in:  ☐ Fight back-up  ☐ Flight back-up

What behaviors led you to this conclusion?

Reflect

What triggers the other person’s back-up behavior?

What does this person need most from you when he or she is in this type of back-up?

Modify

What can you do to manage your own tension?

How can you use LS-CPA or SL-CPA to manage the other person’s tension?

What do you need to avoid doing with this person?
**Evaluate Tool**

**Purpose**

The Evaluate tool gives you information that will help you evaluate your own performance and enhance your versatility skills.

**Process**

**Versatile Response Behavior Checklists:** These checklists help you evaluate your use of versatility skills and determine which skills to enhance or reinforce. Use the checklists as a pre-interaction reminder or immediately after an interaction to evaluate performance.

**Payoff**

Reviewing and reinforcing your versatility skills will help you gain confidence in your ability to apply these skills, and will allow you to use them more effectively in your daily activities.
Versatile Response Behavior Checklists

Purpose

The Versatile Response Behavior Checklists describe desirable behaviors, and can help you analyze your effectiveness in building stronger relationships with others. The checklists are structured to correspond with each stage of the Versatile Response process (Identify, Reflect, and Modify) and can be used:

- As part of an interaction rehearsal—to be filled out by someone playing the role of the other person
- As a pre-interaction reminder of important actions to take during a meeting or a call
- Following an interaction, as a self-evaluation tool or in association with a review session with your manager

Process

Think about a specific interpersonal relationship or interaction:

- For each item on the checklists, place a check mark in the appropriate column to indicate:
  - Yes: I demonstrated the behavior before or during the interaction.
  - N/A: The opportunity to demonstrate the behavior did not occur (or was not appropriate for this interaction).
  - No: I did not demonstrate the behavior even though it would have been useful to do so.

- For those behaviors marked “No,” locate the corresponding activities in the Improvement Activities following the checklists.

- Select and complete the activities most likely to enhance your performance. Use the checklists on an ongoing basis to evaluate your behavior, monitor your progress, and identify potential areas for improvement.

Payoff

Using the checklists is a simple and quick way to identify actions or behaviors that might improve communication or an interpersonal relationship.
## Versatile Response Behavior Checklist

<table>
<thead>
<tr>
<th>Identify Social Style</th>
<th>Yes</th>
<th>N/A</th>
<th>No</th>
<th>Improvement Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I reviewed the characteristics associated with assertiveness, responsiveness, and Social Styles in the <em>Building Relationship Versatility</em> toolkit.</td>
<td></td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>2. I noted assertiveness and responsiveness characteristics in the individual’s speech inflection/tone of voice.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I noted assertiveness and responsiveness characteristics in the individual’s gestures and body language.</td>
<td></td>
<td></td>
<td></td>
<td>B</td>
</tr>
<tr>
<td>4. I noted assertiveness and responsiveness characteristics in the individual’s pace and focus.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I noted assertiveness and responsiveness characteristics in distance communication with the individual (i.e., via e-mail, letter, and/or instant messaging).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. I drew conclusions about the individual’s assertiveness behavior separate from his or her responsiveness behavior.</td>
<td></td>
<td></td>
<td></td>
<td>C</td>
</tr>
<tr>
<td>7. I drew conclusions about the individual’s Social Style by combining my conclusions about his or her assertiveness behavior with my conclusions about his or her responsiveness behavior.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. I compared my Social Style with my perceptions of his or her Social Style, and plotted both of us on a Versatile Response Planner.</td>
<td></td>
<td></td>
<td></td>
<td>D</td>
</tr>
<tr>
<td>9. I shared my conclusions and verified my thinking with a colleague, mentor, or manager.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: Large letters in the right column refer to the Improvement Activities that follow the checklists.*
**VERSATILE RESPONSE BEHAVIOR CHECKLIST**

<table>
<thead>
<tr>
<th>REFLECT ON STYLE EXPECTATIONS</th>
<th>Yes</th>
<th>N/A</th>
<th>No</th>
<th>Improvement Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>10. I reviewed the preferences and expectations for my style and for the style of the individual in the <em>Building Relationship Versatility</em> toolkit.</td>
<td></td>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>11. I reviewed the section on Back-Up Behavior in the <em>Building Relationship Versatility</em> toolkit, and identified the likely indicators of increased Relationship Tension based on the individual’s style.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. I noted the similarities and the differences in my and the other person’s preferences and expectations, and identified areas of potential interpersonal discomfort.</td>
<td></td>
<td></td>
<td></td>
<td>B</td>
</tr>
<tr>
<td>13. I noted what the individual is likely to expect of me with regard to behavior and focus.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. I drew conclusions about modifying my behaviors and my focus that should increase comfort between us.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. I completed the Versatile Response Planner for this individual/situation and specified a relationship goal and/or an interaction objective.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. I shared my conclusions and verified my thinking with a colleague, mentor, or manager.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: Large letters in the right column refer to the Improvement Activities that follow this checklist.*
### VERSATILE RESPONSE BEHAVIOR CHECKLIST

<table>
<thead>
<tr>
<th>MODIFY YOUR BEHAVIOR</th>
<th>Yes</th>
<th>N/A</th>
<th>No</th>
<th>Improvement Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>17. I reviewed the behavior modification strategies in the Building Relationship Versatility toolkit and my behavior modification plans from the Versatile Response Planner.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>A</td>
</tr>
<tr>
<td>18. I modified my assertiveness behavior appropriately for this individual/situation.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>E</td>
</tr>
<tr>
<td>19. I modified my responsiveness behavior appropriately for this individual/situation.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>D</td>
</tr>
<tr>
<td>20. I responded to any increase in Relationship Tension or back-up behavior with LS-CPA or SL-CPA.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>21. I discussed the results of my efforts with a colleague, mentor, or manager.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Large letters in the right column refer to the Improvement Activities that follow this checklist.
Practice Tool

Purpose

The Practice tool provides improvement activities to enhance your versatility skills.

Process

Improvement Activities: These are tasks you can complete during your normal workday to increase your versatility. These activities will help you reinforce and apply your learning on the job.

Payoff

Continuing to learn about and enhance your understanding of the Versatile Response will improve the outcomes of your interactions.
**IMPROVEMENT ACTIVITIES**

<table>
<thead>
<tr>
<th>A</th>
<th>Preparing for Identify, Reflect, and Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Increase your familiarity with the characteristics, preferences, and expectations of each Social Style by periodically reading through the <em>Building Relationship Versatility</em> toolkit.</td>
<td></td>
</tr>
<tr>
<td>■ Talk to colleagues who have been profiled about the accuracy of the information in the toolkit. Annotate the toolkit and your My World at a Glance worksheet with additional information and insights about each style.</td>
<td></td>
</tr>
<tr>
<td>■ Complete a Versatile Response Planner for each instance where you attempt to demonstrate greater versatility. Note the results of your effort and maintain your planners as reference for future interactions.</td>
<td></td>
</tr>
</tbody>
</table>

**IMPROVEMENT ACTIVITIES**

<table>
<thead>
<tr>
<th>B</th>
<th>Using observations to help you Identify, Reflect, and Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Use the My World at a Glance worksheet to help you improve your accuracy at recognizing assertiveness and responsiveness behaviors. Watch the behaviors of the individuals on the form from a distance. Take note of how their respective assertiveness and responsiveness behaviors differ from your behaviors.</td>
<td></td>
</tr>
<tr>
<td>■ Observe others who have been profiled from far enough away so that you can only observe gestures and body language. Note the frequency and characteristics of the body language and gestures. Note patterns or trends in individuals. Compare them to your own behaviors. Take notes about the individuals on a My World at a Glance worksheet or on a Versatile Response Planner.</td>
<td></td>
</tr>
<tr>
<td>■ During phone conversations with others who have been profiled, listen carefully to speech patterns that might indicate assertiveness and/or responsiveness behaviors. Listen to pace, voice inflection, and focus. Note how their speech patterns differ from or parallel your speech patterns. Keep notes about the individuals on a My World at a Glance worksheet or on a Versatile Response Planner.</td>
<td></td>
</tr>
<tr>
<td>■ Periodically practice identifying others’ Social Styles. Draw conclusions about assertiveness and responsiveness separately. Then determine Social Style by combining your assertiveness and responsiveness conclusions.</td>
<td></td>
</tr>
<tr>
<td>IMPROVEMENT ACTIVITIES</td>
<td></td>
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<tr>
<td>------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>C</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Drawing conclusions that help you Identify, Reflect, and Modify</strong></td>
<td></td>
</tr>
<tr>
<td>■ Interview individuals noted on your My World at a Glance worksheet. Ask them directly about things that make them comfortable or uncomfortable in a relationship with others. Ask about preferences and expectations, climate, environment, and focus. Compare their responses to your preferences.</td>
<td></td>
</tr>
<tr>
<td>■ Periodically follow up on e-mail messages and instant messages you send to others with a phone call. Ask individuals about the clarity and appropriateness of your text-based messages to them. Ask them for advice and guidance in making your messages clearer in content and intent. Note their comments on a My World at a Glance worksheet or on a Versatile Response Planner.</td>
<td></td>
</tr>
<tr>
<td>■ Proactively interview people whom you interact with regularly. Ask them about style issues that affect the quality of your relationship with them. Ask them about behavioral expectations and preferences, and share your expectations and preferences with them. Keep track of your findings on a My World at a Glance worksheet or on a Versatile Response Planner.</td>
<td></td>
</tr>
<tr>
<td>■ Create and maintain a “generic” Versatile Response Planner for each person on your My World at a Glance worksheet. Expand on the information from the World at a Glance worksheet by drawing conclusions about expectations and preferences, and by maintaining a general versatility plan to use for each individual. Update these forms periodically as you learn more about each individual’s style.</td>
<td></td>
</tr>
<tr>
<td>■ Draw conclusions about the reaction to stress of each individual on your My World at a Glance worksheet. Note when individuals demonstrate back-up behavior and draw conclusions about the circumstances that seem to trigger back-up behavior. Anticipate what you would do to avoid or respond to the situations that cause back-up behavior for each individual.</td>
<td></td>
</tr>
</tbody>
</table>
### IMPROVEMENT ACTIVITIES

**D**  
Verifying your plans to Identify, Reflect, and Modify

- Create a “Versatility Advisory Board” to help you improve and maintain your versatility skills. Staff your board with people who understand Social Styles and the relationships you deal with on a day-to-day basis. Consider including a colleague, your manager, and someone whom you might define as a mentor for you.

- Check in often with members of your board to verify your thinking and conclusions regarding demonstrating versatility with others. When you create a Versatile Response Planner for a situation, verify the accuracy of your Identify and Reflect conclusions with at least one member of your board. Specifically verify your conclusions about pace, voice, body language, and focus.

- Consider role-playing Versatile Response behaviors with members of your board. Proactively discuss and practice demonstrating versatility with people from your My World at a Glance worksheet. Prepare for specific situations by role-playing your versatility plans with a member of your board.

---

### IMPROVEMENT ACTIVITIES

**E**  
Demonstrating and evaluating your Modify behaviors

- Be clear about your relationship goal every time you attempt to demonstrate Versatile Response behaviors with others. Make sure that you complete the Relationship Purpose and/or Interaction Objective field on the Versatile Response Planner.

- As you execute your plan, pay close attention to reactions as you modify your pace, voice, body language, and focus/content. Take mental notes of what seems to work and what has little or negative effects. Make physical notes about your observations after the interaction.

- Debrief every interaction with a colleague, mentor, or manager. Keep accurate, objective notes about each interaction—especially when your plan works and you have effectively improved the relationship. Review your observations and conclusions, and begin to anticipate the next interaction with the individual.

- In those instances where you are faced with addressing stress or back-up behavior in others, it is especially important to create a plan and review it with someone else. Make sure you can recognize the difference between Fight and Flight behavior. Be sure you know how to use LS-CPA or SL-CPA effectively. Ask someone to role-play the situation with you.

- Practice resisting the urge to jump to Problem Solve or Ask for Action prematurely. Role-play some high-stress situations where you know how to solve the problem or take action on the issue. Spend time getting comfortable with the Listen, Share, and Clarify steps.
Learning Resources

The Learning Resources give you additional information that you can use to apply versatility skills back on the job.

Purpose

Process

Identify Resources:

- **Style Identification—Behavior Clues**: Gives a summary of clues to identify someone’s Social Style
- **The Analytical Style**: Describes characteristics of the Analytical style
- **The Amiable Style**: Describes characteristics of the Amiable style
- **The Driver Style**: Describes characteristics of the Driver style
- **The Expressive Style**: Describes characteristics of the Expressive style
- **The Social Style Subquadrants**: Shows the Social Style matrix divided into its 16 subquadrants
- **Back-Up Behavior**: Gives a summary of how back-up behavior looks for each Social Style
Reflect Resources:

- **Social Style Preferences and Expectations**: Provides a summary of preferences and expectations of each of the four Social Styles

Modify Resources:

- **Stretching Beyond Your Comfort Zone**: Describes strategies to increase assertiveness and responsiveness behaviors in order to demonstrate greater versatility

- **Meeting Strategies—Analytical**: Describes ways to modify your behavior for the Analytical style before, during, and after a meeting

- **Meeting Strategies—Expressive**: Describes ways to modify your behavior for the Expressive style before, during, and after a meeting

- **Meeting Strategies—Driver**: Describes ways to modify your behavior for the Driver style before, during, and after a meeting

- **Meeting Strategies—Amiable**: Describes ways to modify your behavior for the Amiable style before, during, and after a meeting

---

**Payoff**

Expanding your versatility skills and understanding of Social Styles will help you gain confidence in your ability to apply these skills, which will allow you to use them more effectively in your daily activities.
Style Identification—Behavior Clues

- Uses fewer gestures, minimal body language
- Has a consistent tone and voice inflection
- Shares and displays fewer emotions
- Displays less variety in facial expression
- Focuses dialogue first on task and facts

- Uses conditional language
- Asks more questions than statements
- Leans back
- Has a deliberate rate of speech
- Speaks at a softer volume
- Makes fewer interruptions

- Uses declarative language
- Makes more statements than questions
- Leans forward
- Has a rapid rate of speech
- Speaks at a louder volume
- Makes more frequent interruptions

- Uses more and wider gestures and body language
- Has a varied tone and voice inflection
- Shares and displays more emotions
- Displays more facial expression
- Focuses dialogue first on people and relationships
The Analytical Style

An Analytical individual is perceived as detail oriented, deliberate, and well organized. This person listens to and studies information carefully before weighing all alternatives with reference to established policies, criteria, and objectives. An Analytical tends to avoid personal involvement with others and lets them take the social initiative. In general, this person prefers an efficient, businesslike approach to conducting business.

The Analytical person wants to understand the pieces of the picture. An Analytical’s needs are best met when information is presented in a systematic, efficient manner; sufficient information about the problem/issue is provided; and time for processing recommendations is allowed.

Some phrases used to describe an Analytical are:

- Conservative and practical in business decisions
- Technically oriented; relies on structured approach and factual evidence
- Tends to avoid uncomfortable situations by changing the topic or withdrawing
- Prefers a systematic, thorough approach to data gathering and presentation of recommendations

The strengths commonly attributed to an Analytical include:

- Ensures that the company’s needs are met
- Is careful about committing company resources
- Analyzes facts and evidence before deciding
- Makes practical, cost-effective decisions
- Approaches others with caution, avoiding personal involvement
The Amiable Style

An Amiable individual is seen as warm, cooperative, and attentive. This person generally gathers information and processes it with others before making a decision. An Amiable wants to establish a strong, trusting relationship with others prior to making a decision. This person wants to know that the people he or she is working with will keep commitments.

The Amiable wants to feel assured that others will accept the new idea or solution and support his or her decisions. An Amiable’s needs are best met when a trusting relationship is established and the other person takes the time to understand the needs of the Amiable and the organization, and is responsive to requests and problems.

Some phrases used to describe an Amiable are:

- Careful, but cooperative in business situations
- People oriented; relies on the support of others and shared decision making
- Tends to avoid uncomfortable situations by withdrawing or changing the topic
- Prefers an interactive approach to problem solving

The strengths commonly attributed to an Amiable include:

- Ensures that others will accept decisions
- Carefully determines whether commitments will be honored
- Processes recommendations with others before deciding
- Is sensitive to the needs of others in the decision-making process
- Establishes trusting relationships with others
The Driver Style

A Driver is seen as controlling, forceful, and results oriented. This type of person usually has clear objectives to achieve and responds to those who can demonstrate that their ideas and solutions can efficiently and effectively achieve results. A Driver tends to have a high sense of urgency and little need for establishing relationships with others. This person wants to know options and their probabilities of success.

The Driver wants other people to listen carefully before recommending ideas or solutions. A Driver's needs are best met when information is gathered in an organized manner; the other person listens willingly and avoids becoming defensive; follow-up on requests is timely; past successes, references, and factual support are provided; and time for considering options is allowed.

Some phrases used to describe a Driver are:

- Knowledgeable and forceful in business decisions
- Goal oriented; relies on information that supports results
- Tends to act quickly and confront issues directly
- Expects people to listen carefully and respond in a timely manner

The strengths commonly attributed to a Driver include:

- Keeps the discussion focused on objectives
- Explains the situation so that the other person can recommend an appropriate solution
- Makes expectations clear
- Acts quickly, after careful consideration of options
- Attempts to balance quality and cost considerations when making decisions
The Expressive Style

The Expressive is perceived as fast paced, outgoing, and enthusiastic. This person often has a vision of the future and is responsive to ideas, solutions, and people that help achieve that vision. An Expressive will take the time to establish an open, trusting relationship with those who can make it easier to achieve goals. This type of person wants others they work with to collaborate in finding and implementing quality solutions to meet needs.

The Expressive wants to see the big picture before probing the details. An Expressive’s needs are best met when others question and listen well, can demonstrate competence, allow the Expressive to give input, help the Expressive obtain internal support for his or her ideas, and stay on top of the implementation.

Some phrases used to describe an Expressive are:

- Futuristic, holistic in thinking
- Motivating; attempts to make others enthusiastic about visions and ideas
- Tends to be direct and open, even in uncomfortable situations
- Prefers a collaborative approach to problem solving

The strengths commonly attributed to an Expressive include:

- Openly offers information to help others meet needs
- Collaborates on proposals to make them effective within the organization
- Demonstrates concern about the quality of solutions and their implementation
- Adapts to the needs of others
- Is innovative; willing to take risks
The Social Style Subquadrants

- **TASK** Directed
  - D: Analytical Analytical
  - C: Driving Analytical
  - B: Analytical Driver
  - A: Driving Driver

- **TELL** Directed
  - ASK Directed
  - 1: Analytical
  - 2: Amiable
  - 3: Expressive
  - 4: Amiable

- **RESPONSIVENESS**
  - TELL
  - ASK
  - Directed

- **ASSERTIVENESS**
  - Directed
**Back-Up Behavior**

**Analytical—Avoiding**
- Avoids confrontation
- Draws attention away from an issue
- Retreats to other distractions
- Delays a decision; controls emotions

**Driver—Autocratic**
- Confronts others
- Focuses on the issue
- Looks for rationale
- Becomes demanding

**Amiable—Acquiescing**
- Smoothes relationships
- Yields to others’ viewpoints
- Wavers on opinions; hesitates
- Gives in; withdraws support

**Expressive—Attacking**
- Confronts others
- Verbalizes judgmental feelings
- Blames others on a personal level
- Shows extreme emotion
Social Style Preferences and Expectations

**Analyticals Want …**
- A more formal and structured approach
- Enough time to think things through
- Evidence of how results were achieved
- Clear, logical processes
- Support for their thinking and principles
- Data that aids decision making
- Respect

**Drivers Want …**
- A businesslike attitude with a focus on effective problem solving
- Efficient use of time
- Evidence of results
- Strong business knowledge
- Documentation and facts
- Clear benefits
- Support for their ideas
- Options and choices
- Control

**Amiables Want …**
- An open and honest approach
- Time to develop the relationship with others
- Support for feelings
- Assurances
- Others’ involvement in the decision-making process
- Clarity of impact on others
- To know why it’s right
- Approval

**Expressives Want …**
- More flexible use of time
- Discussions that keep moving and generate ideas
- Others to get to know them as people
- Personal recognition for their ideas and actions
- A collaborative approach
- Not too much detail
- Testimonials as evidence of success
- Recognition
Stretching Beyond Your Comfort Zone

- Think about the way you need to increase your assertiveness or responsiveness.
  - Do you need to use more ask-assertive or more tell-assertive behaviors?
  - Do you need to use more task-responsive or more people-responsive behaviors?

- Always modify one dimension at a time, either assertiveness or responsiveness.

### Increasing Task-Directed Responsiveness
- Talk about the task; emphasize facts.
- Demonstrate the logic behind your ideas.
- Acknowledge the person's concerns about the use of time.
- Use fewer gestures and facial expressions.
- Avoid small talk.

### Increasing Ask-Directed Assertiveness
- Ask for the person's opinions first.
- Use a slower pace.
- Listen without interrupting.
- Pause more often.
- Ask for a commitment without pressure.

### Increasing Tell-Directed Assertiveness
- Get to the point quickly.
- Volunteer information to the person.
- Be willing to express points of disagreement.
- Initiate conversation.
- Act quickly on decisions.

### Increasing People-Directed Responsiveness
- Verbalize your feelings.
- Pay personal compliments.
- Be willing to discuss personal experiences both at work and outside the workplace.
- Use more gestures and facial expressions.
- Vary your tone of voice.
# Meeting Strategies—Analytical

## RECOMMENDED BEHAVIORS

<table>
<thead>
<tr>
<th>BEFORE</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Send an e-mail message outlining the agenda of the meeting.</td>
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<tr>
<td></td>
<td>Provide any documentation or data you want the Analytical to review before the meeting.</td>
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<tr>
<td></td>
<td>Review your e-mail message and attachments for spelling or factual errors.</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>DURING</th>
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<tbody>
<tr>
<td></td>
<td>Get down to business without personal discussion.</td>
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<tr>
<td></td>
<td>Review the data.</td>
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<tr>
<td></td>
<td>Ask the person for his or her opinions.</td>
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<tr>
<td></td>
<td>Use a slower, more deliberate pace during the conversation.</td>
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<tr>
<td></td>
<td>Avoid rushing to a decision. Acknowledge the person’s desire for an objective and considered approach to decision making.</td>
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<tr>
<td></td>
<td>Discuss timelines and schedule, making sure that the other person has enough time for decision making.</td>
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<tr>
<td></td>
<td>Provide a clear rationale for abbreviated timelines.</td>
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<tr>
<td></td>
<td>Agree on follow-up steps.</td>
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<table>
<thead>
<tr>
<th>AFTER</th>
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<tbody>
<tr>
<td></td>
<td>Provide additional data as requested.</td>
</tr>
<tr>
<td></td>
<td>Follow the agreed-upon process and schedule.</td>
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<tr>
<td></td>
<td>Communicate through factually oriented e-mail messages.</td>
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<tr>
<td></td>
<td>Avoid chatty phone calls or instant messages.</td>
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<tr>
<td></td>
<td>In an e-mail message, acknowledge the value of the person’s technical expertise and the contribution this has made to the solution.</td>
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</tbody>
</table>
### Meeting Strategies—Expressive

<table>
<thead>
<tr>
<th>RECOMMENDED BEHAVIORS</th>
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</thead>
<tbody>
<tr>
<td><strong>BEFORE</strong></td>
</tr>
<tr>
<td>Call the person by phone to set up the meeting.</td>
</tr>
<tr>
<td>Make the conversation upbeat.</td>
</tr>
<tr>
<td>Emphasize the opportunities for collaboration, creativity, and increased visibility.</td>
</tr>
<tr>
<td>If you send an e-mail, keep it short and emphasize the personal benefits to the other person. Avoid a detailed agenda or lengthy attachments. Provide a summary of the data instead.</td>
</tr>
</tbody>
</table>

| **DURING**             |
| Take time at the beginning for personal conversation with the person. |
| Establish and maintain an energetic pace to the meeting. |
| Avoid a lengthy examination of detailed information. |
| Provide plenty of opportunities for the person to express his or her point of view. |
| Document all decisions, and make sure there is a clear understanding of roles and responsibilities for implementation. |
| Express your ideas with enthusiasm. |
| When necessary, refocus the discussion on the business issue. |
| Create verbal pictures for your ideas and their impact/benefits for the other person. |

| **AFTER**              |
| Send an e-mail or text message expressing your appreciation for the person’s personal contribution. |
| Summarize the agreed-upon decisions, roles, responsibilities, and next steps (in a short e-mail message). |
| Acknowledge the other person’s continued support and/or success through short e-mails, voice mails, or text messages. |
| Publicly recognize the person’s support and/or success. |
**Meeting Strategies—Driver**

<table>
<thead>
<tr>
<th>RECOMMENDED BEHAVIORS</th>
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<tbody>
<tr>
<td><strong>BEFORE</strong></td>
</tr>
<tr>
<td>- Send a short e-mail message to set up the meeting. Outline the meeting’s purpose, the agenda, and the business benefit to the other person for taking time to meet with you.</td>
</tr>
<tr>
<td>- Attach a short summary that emphasizes outcomes.</td>
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<tr>
<td>- Prepare more detailed information to take with you.</td>
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<tr>
<td><strong>DURING</strong></td>
</tr>
<tr>
<td>- Arrive early; be ready to start on time.</td>
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<tr>
<td>- Get down to business quickly; avoid unnecessary personal conversation.</td>
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<tr>
<td>- Confirm the time available for the meeting with the person.</td>
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<tr>
<td>- Establish a quick pace to the discussion.</td>
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<tr>
<td>- Present your conclusions in a rational and logical manner.</td>
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<tr>
<td>- Listen carefully to the other person’s point of view, and then respond.</td>
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<tr>
<td>- Emphasize the outcomes and results, especially as they relate to the other person.</td>
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<tr>
<td>- Avoid unnecessary details, unless asked for by the person.</td>
</tr>
<tr>
<td>- Ask for a decision in the meeting.</td>
</tr>
<tr>
<td>- Discuss next steps and provide as much independence as possible.</td>
</tr>
<tr>
<td>- End the meeting early if you can.</td>
</tr>
<tr>
<td><strong>AFTER</strong></td>
</tr>
<tr>
<td>- Confirm decisions, next steps, and timelines with a short e-mail message.</td>
</tr>
<tr>
<td>- Avoid unnecessary oversight.</td>
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<tr>
<td>- Be quick to respond to requests for help and information.</td>
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# Meeting Strategies—Amiable

<table>
<thead>
<tr>
<th>RECOMMENDED BEHAVIORS</th>
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<tbody>
<tr>
<td>BEFORE</td>
</tr>
<tr>
<td>▪ Make a personal call to the person to set up the meeting.</td>
</tr>
<tr>
<td>▪ E-mail required information and encourage the person to share the information with others for their opinions, if appropriate.</td>
</tr>
<tr>
<td>DURING</td>
</tr>
<tr>
<td>▪ Begin the meeting with some personal conversation.</td>
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<tr>
<td>▪ Adopt a comfortable and relaxed pace for the conversation.</td>
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<tr>
<td>▪ Ask the person to share his or her feelings about the business issue and the feelings of others he or she has talked with.</td>
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<tr>
<td>▪ Jointly develop solutions that will appeal to the person and others affected by the issue.</td>
</tr>
<tr>
<td>▪ Avoid pressuring the person for an immediate decision.</td>
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<tr>
<td>▪ Acknowledge the person’s desire to consult others and provide an opportunity to do so.</td>
</tr>
<tr>
<td>▪ Reassure the person of your ongoing support.</td>
</tr>
<tr>
<td>AFTER</td>
</tr>
<tr>
<td>▪ Congratulate the person for effectively supporting others to achieve results.</td>
</tr>
<tr>
<td>▪ Provide support by initiating check-ins and responding to requests.</td>
</tr>
</tbody>
</table>