

DECEMBER 2025

# Establishing A Culture of Success



**DAUBERT**  
*CHEMICAL COMPANY, INC.*

*“Customized Training for  
Daubert Chemical Company”*

SALES CONCEPTS

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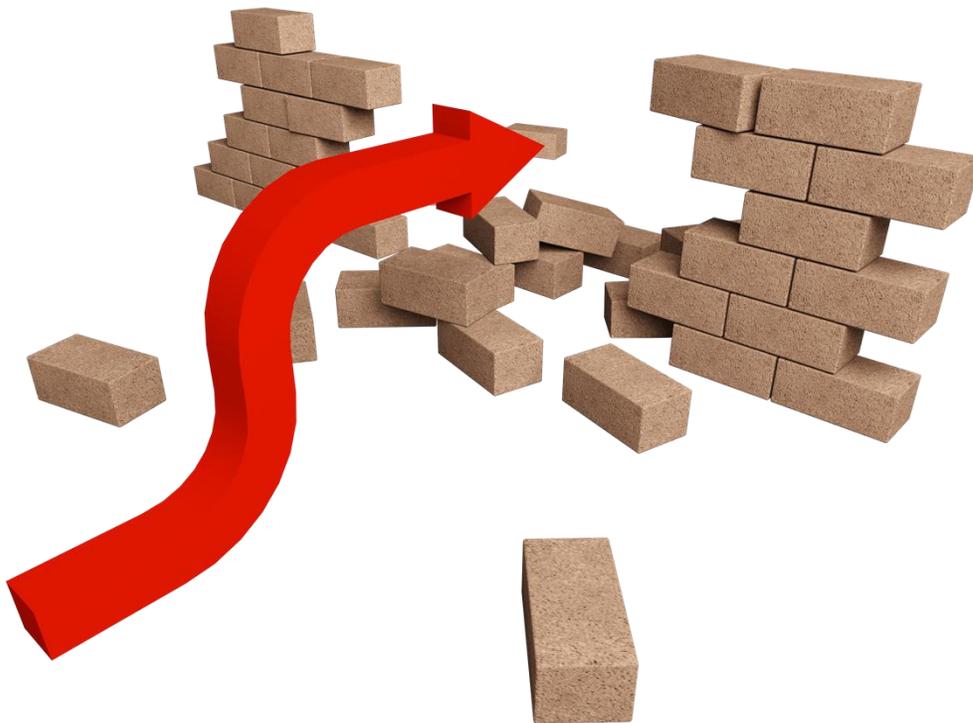
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# Level 1 – Liberty



*“Leaders achieve liberty from their lids.  
They are aware of their potential.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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Most of us agree that while leadership and management are related, there are distinct differences.

How would you differentiate Leadership and Management?



Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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## What makes an effective leader?

List traits here:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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What is the difference between leadership and management?

Leader	Subject	Manager
<i>Change</i>	Objective	<i>Status quo</i>
_____	Time Frame	_____
_____	Decisions	_____
_____	Power	_____
_____	Risks	_____
_____	Planning	_____
_____	Energy	_____
_____	Credit	_____
_____	Blame	_____
_____	Concern	_____
_____	Rules	_____
_____	Wants	_____
_____	Persuasion	_____

Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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Who would you say are the most effective leaders of all time?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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Who are/were the top three leaders in your life? Why?

Instructions: In the spaces below, please list who you consider the three most influential leaders for you (past or present) and why.

1. \_\_\_\_\_

Why:

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2. \_\_\_\_\_

Why:

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3. \_\_\_\_\_

Why:

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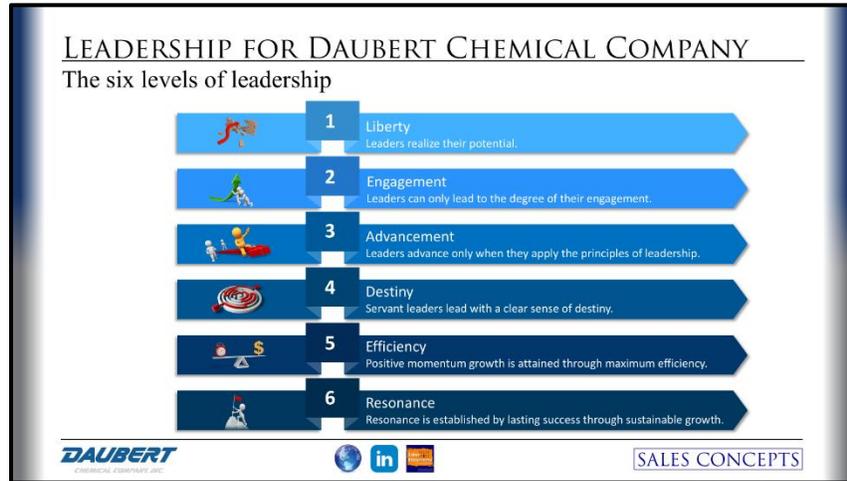
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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## 1. **Liberty** – Leaders achieve liberty from their lids. They are aware of their potential.

First and foremost, successful leaders are free. Successful leaders are free from their restraints. They are free from biases and ideas that keep them from accepting innovative ideas and better alternatives. They are open to evaluating themselves objectively. Leaders know and accept their strengths and weaknesses. They work to overcome negative emotions that impede their progress. They understand who they are, what they want, and how to inspire others to help them.

**Application Thought:** *“Until I free myself from my limitations, I can’t go very far, and I certainly can’t take anybody anywhere. Fail to master the Law of the Lid, and I fail to master everything.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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## 2. **Engagement** – Leaders can only lead to the degree of their engagement.

Leaders who achieve liberty but never engage are like a car with a running engine that is not in gear. Engaged leaders intentionally work to improve their leadership ability. Effective leaders study, invest in, and engage in personal growth. They maintain a healthy respect for themselves and others. They understand the importance of integrity, authenticity, and personal growth.

**Application Thought:** *“Without trust, no one will follow me; the by-product of trust is respect; I gain trust and respect by setting the example for others to follow; without systematically approaching my leadership growth, I will lose my way.”*

## 3. **Advancement** – Leaders advance only when they apply the principles of leadership.

Advancing leaders understand and apply the laws of leadership. They continuously work to master and apply the more advanced ones. They understand how to actively influence others. They understand that to influence others actively, they have to provide value. They intentionally diversify and connect with others, wherever they are. They set the direction for themselves and their organizations. They attract and influence other leaders.

**Application Thought:** *“Cloning myself inevitably leads to stagnation. If I can’t connect with others, I have no hope of leading them. If I connect without adding value to them, I just have a bunch of acquaintances. Without navigation, I have a team that has enormous potential but is rudderless. Without connection, addition, and direction, I can’t possibly lead or influence anyone.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 1 LIBERTY

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## 4. **Destiny** – Servant leaders lead with a clear sense of destiny.

Principles of destiny do not come naturally to many leaders. However, they serve as a bridge to the application of advanced leadership concepts. The best leaders understand that victory begins with a winning attitude, that victory begins with a mindset. The best leaders encourage, celebrate, and cherish others' victories. They understand the degree of sacrifice required to build a legacy. Legacy is the long-term vision of successful leadership. To acquire it, the very best leaders bring others with them.

**Application Thought:** *“Victory is the aim of all endeavors, though it comes in many forms. Victory is seldom achieved without sacrifice, particularly on the part of the leader. My (our) legacy will be defined by the indelibility of our accomplishments.”*

## 5. **Efficiency** – Positive momentum growth is attained through maximum efficiency.

Efficiency is the product of advanced leadership and is required to realize higher levels of success. Efficiency is difficult to maintain. Like an entertainer juggling multiple plates, an efficient leader is a master of the principles of intuition, priorities, momentum, and timing. Many endeavors fail because leaders fail to master the principles.

**Application Thought:** *“Intuition saves time, effort, and money. Without (or with limited) intuition, I must expend considerable energy to accomplish what is needed. Without the ability to discern what is truly important, my priorities are a moving target. Without a good sense of timing, strong intuition, and a sharp focus, my actions remain mere activities rather than accomplishments. Momentum works two ways; positive momentum is the product of high intuition, well-set priorities, and an excellent sense of timing. Negative momentum results when one or more of these qualities is lacking.”*



# Level 2 – Engagement



*“Leaders can only lead to the degree of their engagement.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Human Behavioral Styles



*Behavioral Styles is a method for relating to different types of people to meet their expectations.*

*Behavioral Styles is behavior. It is not personality.*

*Personality is the reason you behave the way you do.*

*Behavior is what you let others see of you.*

*It's how you do things.*

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Human Behavioral Styles

How do you define behavior?

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Behavioral Styles increases your awareness of other people’s behavior, your communication effectiveness, and your teamwork. By using this method, you’ll be more effective at understanding and meeting the expectations of prospects and customers. You also see where potential conflicts may arise. Human Behavioral Styles is only what you see of someone on the surface. It’s not rocket science. It is what is observable. Two research psychologists and one research assistant at Stanford University developed this model, although it has roots dating back to Aristotle and Plato.

LEVEL 2 – ENGAGEMENT

### Goal

Do the best job possible of meeting the expectations of prospects and customers by working with them the way they want to be worked with.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Human Behavioral Styles

LEVEL 2 – ENGAGEMENT

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***It's how a person does things.***

It's a particular *pattern of actions* that others can observe and agree upon for describing a person's usual behavior.

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Behavioral Styles has nothing to do with morals or values. It is simply a way to describe one's *usual* behavior—how a person behaves most of the time. At various times, anyone can exhibit all forms of behavior. We are talking about *usual* and *consistent* behavior over time. This also relates to the first few minutes of an encounter.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Human Behavioral Styles



What does the rear wheel on a motorcycle do?

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What does the front wheel do?

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If you put your communication cycle on autopilot and treat everyone the same way, eventually you are going to crash.

### PLATINUM RULE

*“Do unto others the way they like.”*

It works.

Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Human Behavioral Styles

To determine a person's behavior style, you must evaluate two dimensions of their behavior. Pace and Priority.

LEVEL 2 – ENGAGEMENT

**How to determine someone's style...**

We evaluate two dimensions of human behavior:

- **Pace**
- **Priority**

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The First Dimension of Human Behavior: Pace

LEVEL 2 – ENGAGEMENT

**Pace**

 **D C B A** 

**Slower** ←  **Faster**

A = Faster paced than at least 75% of the population  
B = Faster than half but slower than a quarter of the population  
C = Slower than half but faster than a quarter of the population  
D = Slower than at least 75% of the population

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C and D people:

- Do things by asking questions.
- Prolong decisions.
- Tend to be more cautious.

A and B people:

- Do things by telling.
- Make quick decisions.
- Tend to take more risks.

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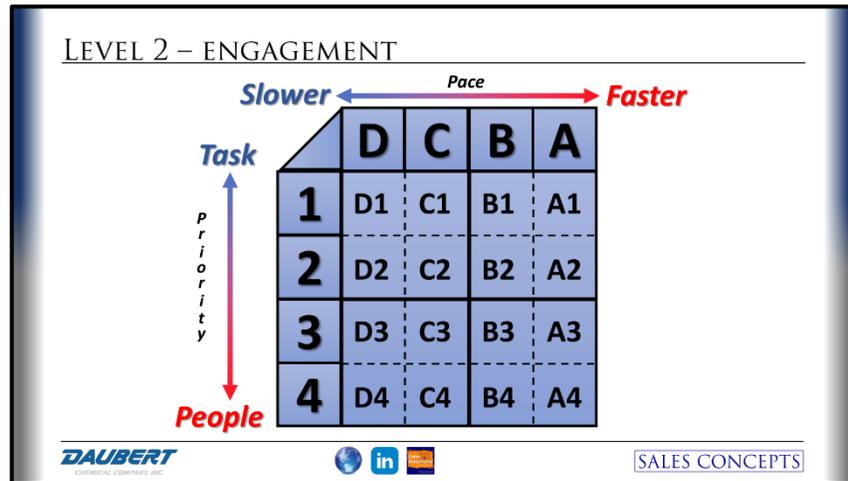


# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Human Behavioral Styles

Now combine the two axes.

On the axes, circle your letter and number.



Where do they intersect? \_\_\_\_\_

This means I am a: \_\_\_\_\_

Analyticals are C1, C2, D1, D2.

Assertives are A1, A2, B1, B2.

Amiables are C3, C4, D3, D4.

Animateds are A3, A4, B3, B4.

*There is no correct style to be.*

*Successful people  
are found in all four styles.*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Human Behavioral Styles

### THE FOUR STYLES

LEVEL 2 – ENGAGEMENT

	D	C	B	A
1	<i>Analytical</i>		<i>Assertive</i>	
2				
3	<i>Amiable</i>		<i>Animated</i>	
4				

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### Adjectives that describe Assertives:

Positive Adjectives

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Negative Adjectives

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### Adjectives that describe Animateds:

Positive Adjectives

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Negative Adjectives

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Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Human Behavioral Styles

### Adjectives that describe Analyticals:

Positive Adjectives

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Negative Adjectives

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### Adjectives that describe Amiables:

Positive Adjectives

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Negative Adjectives

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Human Behavioral Styles

### Sub-Styles

You are a combination of two styles  
 You have a major style and a minor style, or sub-style

LEVEL 2 – ENGAGEMENT

	D	C	B	A
<b>1</b>	D1 Analytical	C1 Assertive	B1 Analytical	A1 Assertive
<b>2</b>	Amiable D2	Animated C2	Amiable B2	Animated A2
<b>3</b>	D3 Analytical	C3 Assertive	B3 Analytical	A3 Assertive
<b>4</b>	Amiable D4	Animated C4	Amiable B4	Animated A4

Analytical
Assertive  
Adaptable  
Amiable
Animated





### Analyticals

- If you are a D-1 your major style is analytical and your sub style is analytical.
- If you are a D-2 your major style is analytical and your sub style is amiable.
- If you are a C-1 your major style is analytical and your sub style is assertive.
- If you are a C-2 your major style is analytical and your sub style is animated.

### Assertives

- If you are a B-1 your major style is assertive and your sub style is analytical.
- If you are a B-2 your major style is assertive and your sub style is amiable.
- If you are an A-1 your major style is assertive and your sub style is assertive.
- If you are an A-2 your major style is assertive and your sub style is animated.

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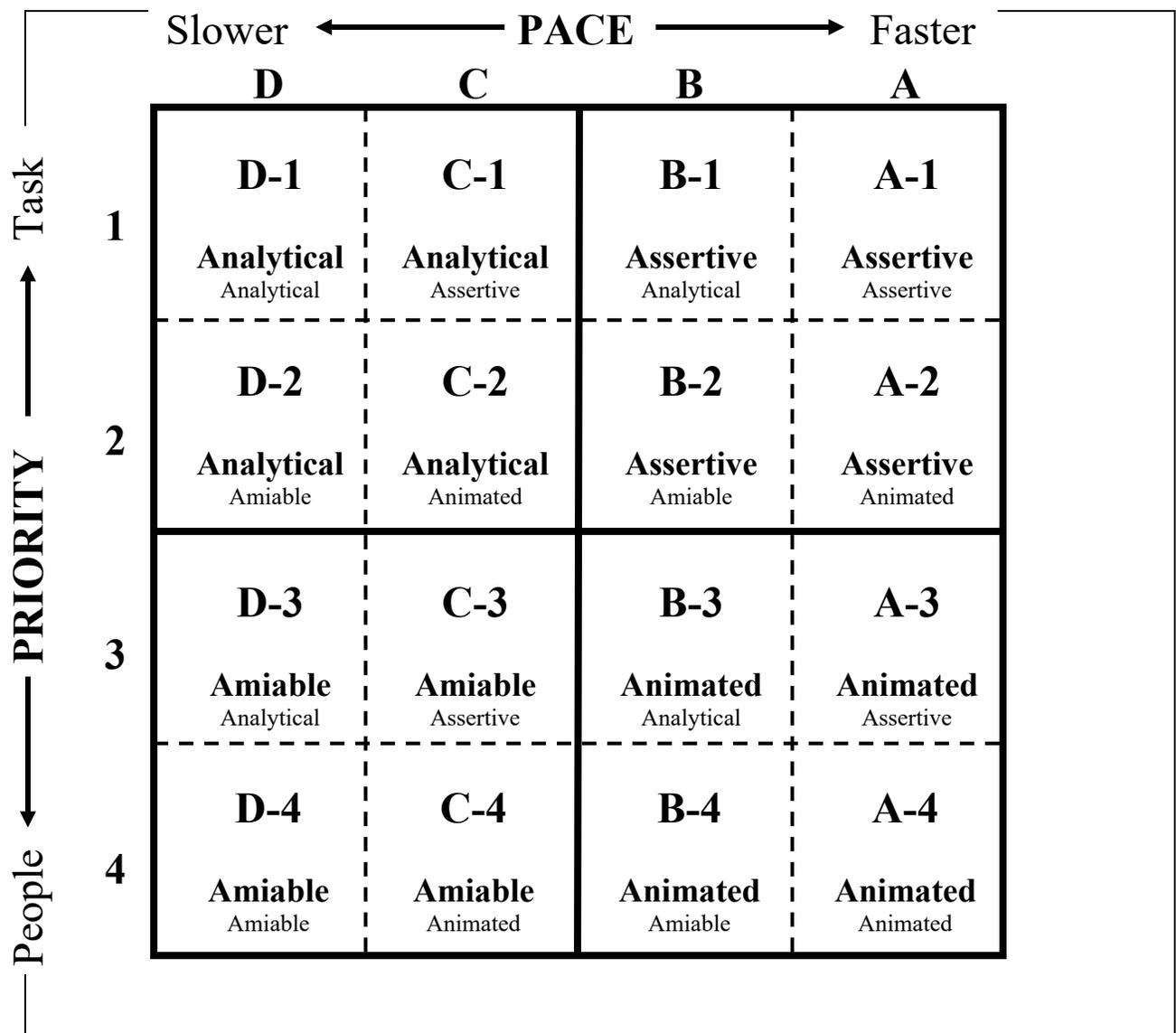
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## BEHAVIOR STYLE MINI QUADRANTS



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# WHAT IS SELLING, WHY DO PEOPLE BUY?

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Within the four major style quadrants there are sixteen specific mini-quadrants. They may be summarized as follows.

## THE ASSERTIVE QUADRANTS (A-1, A-2, B-1, B-2)

### **Assertive-Assertive (A-1)**

People with this style are strongly assertive and controlling. They are goal-oriented and think in an immediate time frame. They want to achieve... now! Assertive-assertives make decisions quickly and must be allowed to do so. Others often view them as insensitive since they devote maximum effort to accomplishment and minimum effort to understanding the feelings of others.

### **Animated-Assertive (A-2)**

This style combines strong assertiveness with a mild charismatic style. People with this style take command of a situation. They are comfortable directing others and influencing others by their personal forcefulness. The animated-assertive is often perceived by others as too aggressive and ambitious, even too authoritarian. Recognition and praise will move this person to achieve.

### **Analytical-Assertive (B-1)**

This is a moderately assertive and strongly controlled style. Others view people having this style as exhibiting accuracy and dependability in performance. The analytical-assertive is seldom seen as too overbearing. People who have this style appreciate a challenging situation that depends upon their technical skills. While analytical-assertives tend to avoid emotional involvement, they can work well with others because they inspire confidence through example. This style tends to want to control situations, does not delegate authority or responsibility easily, and tends to analyze efforts rather than feelings.

### **Amiable-Assertive (B-2)**

Also known as an adaptable-assertive, people with this style are both moderately assertive and mildly responsive. Their behavior is a balance of ambition and relationship orientation. They need to achieve, but they need to be liked. This sometimes causes others to see them as indecisive. The amiable-assertives may not make a maximum effort to press their point unless they are sure of their position with others. People with this style will capitalize on their ability to influence the thinking and behaviors of others.

## THE ANIMATED QUADRANTS (A-3, A-4, B-3, B-4)

### **Assertive-Animated (A-3)**

This style combines strong assertiveness with added responsiveness. People with this style are accomplished at influencing others by sheer personal force and charisma. They are comfortable directing others, and their socially active behavior is often effective. They need recognition and reward to stimulate them to achieve. Others may view them as too aggressive and ambitious, often not professional, needing to win no matter what the cost.

### **Animated-Animated (A-4)**

Perhaps the most creative of all the styles. This style combines strong assertiveness with intense responsiveness. People with this style are extroverted and intensely ambitious. Their energy level is extraordinary. They display a confident demeanor. They rely heavily upon their intuition to guide their actions rather than cold, hard facts. Less assertive people may view the animated-animated as too ambitious, too egotistical and too impulsive. Their enchantment with “great things to come in the future” tends to hamper their effectiveness in dealing with present necessities. Their lack of focus on details is often offset by their eccentric creativity and view of the big picture.

### **Analytical-Animated (B-3)**

Also known as the adaptable-animated, this style combines moderate assertiveness with moderate responsiveness. People with this style are concerned with others and are adept at maintaining harmony among individuals of a group. This concern with others includes the willingness to listen to their ideas and viewpoints. People with this style receive the trust and confidence of others to do their bidding. People tend to view them at times as too willing to change direction to avoid conflicts. At times, in situations where tasks need to be accomplished, some people will see them as relying too much on their persuasive skills and too little on fact and logic.

### **Amiable-Animated (B-4)**

This style combines moderate assertiveness with intense responsiveness. This style is closely akin to the animated-amiable style with slightly stronger assertive behavior.

## THE AMIABLE QUADRANTS (C-3, C-4, D-3, D-4)

### **Assertive-Amiable (C-3)**

This style combines mild assertiveness with moderate responsiveness. People with this style evoke confidence and trust from others through friendly persuasion rather than force. They can, when the need arises, be direct and confrontational to maintain the support needed by others in an endeavor. Others tend to view the assertive-amiable as supportive and helpful. The assertive-amiable does not always see it necessary to take a strong stand.

### **Animated-Amiable (C-4)**

This style combines mild assertiveness with intense responsiveness. People with this style are people-oriented and effective in promoting relationships. Others view the animated-amiable as forthright but moderately so. Their people skills temper their candor. They seek approval, but may be lacking in detailed planning and fact-gathering skills. This being so, others may see them at times as inaccurate and superficial in their work while admiring their concern with relationships.

### **Analytical-Amiable (D-3)**

This style combines limited assertiveness with moderate responsiveness. People with this style are friendly, and they like people. However, they work best by themselves on clearly defined tasks. The analytical-amiable is a good listener and functions effectively in a group by listening and asking questions for clarification. People view the analytical-amiable as being uncomfortable with giving directions to others or correcting others. Highly assertive people often do not remember the names of analytical-amiables.

### **Amiable-Amiable (D-4)**

Perhaps the most loyal of all the styles. This style combines limited assertiveness with intense responsiveness. People with this style have a strong social drive, and they depend on others more than fact or necessity when making decisions. Others often view them as very friendly and accepting. They are successful team players. Highly assertive people see them as “easy marks,” lacking in strength of will and vacillating when difficult decisions need to be made.

## THE ANALYTICAL QUADRANTS (C-1, C-2, D-1, D-2)

### **Assertive-Analytical (C-1)**

This style combines strong control of emotions with mild assertiveness. This style is closely akin to the analytical-Assertive style, different primarily with respect to a lesser degree of assertiveness and a lesser tolerance for risks than the B-1.

### **Animated-Analytical (C-2)**

This style combines mild assertiveness with mild responsiveness. People who have this style have the tendency to depend upon themselves to get the job done rather than on others. However, they do seek personal relationships that can be built on a solid foundation. They tend to avoid conflict with others. They are diplomatic, but use facts and logic to back them up in their diplomacy. Animated-analyticals need approval from others — they desire approval based upon their competency in “doing an exceptional job.” In this respect, they are more achievement oriented than acceptance oriented, though they need both. They will take a firm stand at times, but often will depend upon themselves to complete a job when others fail to follow through with their part. They will exercise authority over others when they have to, but they find it difficult to sustain this over a long period of time if the others involved are incompetent or lazy.

### **Analytical-Analytical (D-1)**

This task-oriented style combines limited assertiveness with strong control of emotions. People with this style are in the lowest quartile of assertiveness and the lowest quartile of responsiveness. They do not like to assert themselves or to give vent to their emotions or opinions. They are task oriented and prefer using their skills alone or in small groups. People with this style rely upon facts, logic and process. They intend to explore all avenues of a situation before making a decision. Perfection usually trumps urgency. They are skilled thinkers, planners and organizers. When in leadership roles they lead by example and competence, not personal force. More assertive people often view the analytical-analytical as unenthusiastic, too slow and deliberate, unable to make a decision and act on it. Of all the styles, this one is most likely to hold a grudge.

### **Amiable-Analytical (D-2)**

This style combines limited assertiveness with mild responsiveness. This style is closely akin to the analytical-amiable style, different primarily with respect to a greater degree of emotional control and professionalism than the D-3.

# WHAT IS SELLING, WHY DO PEOPLE BUY?

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## How They React Under Stress or Pressure

### **Assertive < > Dictate**

When Assertives are confronted with individuals who do not conform to their wishes, their tension increases and they revert to their back-up style. They want to control the situation and will use their position of power. If they do not have a high position, they will insert their physical or vocal presence. They minimize emotional display and tend to dominate with facts. They cut off conversations and issue edicts. They will tolerate but not respect “*yes people*” because they believe they have mastered them. They directly confront those who oppose them until they win. Assertives will not accept being subordinate to anyone since that is admitting defeat. Their approach is “I win, you lose.” They become selfish in their actions and approach. Under tension, they become very dictatorial and non-emotional.

### **Animated < > Attack**

Like Assertives, Animateds are very competitive. When their tension reaches the level where they cannot cope, they attack. They express feelings very openly in an emotional and hostile way. They can whip others along with emotional display. They will attack verbally and personally with emotions and opinions. For those who are supportive, they are friendly, pleasant and even gracious. They are competitive. They like risk and challenge, they have difficulty sustaining long-term goals. They become impatient with those who drag their feet on decisions, cannot see the big picture or are knee deep in facts and details. They want to lead the parade. They attack personally and will use the word “you” strongly and sometimes offensively. Once they have verbalized their frustration, they will tend to apologize or “mend the fence,” since they are very aware of relationships. Under tension they become extremely self-centered, loquacious, and vociferous. Although they can get angry quickly, they don’t stay angry for long and tend to be the most forgiving of all the styles.

### **Amiable < > Acquiesce**

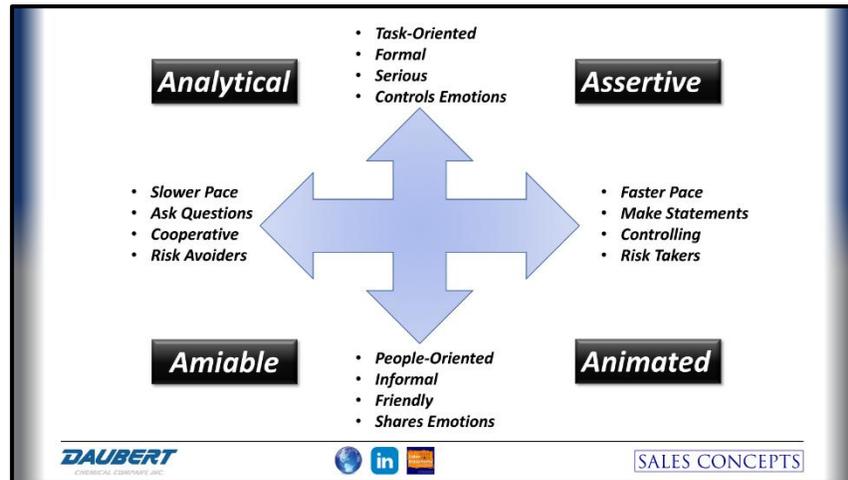
When Amiables are confronted by tension of others, they acquiesce. Amiables want to be accepted, approved and even loved by others. They do not like conflict; therefore, when an assertive or animated revert to their back-up behavior, the amiable will acquiesce. S/he will “*go along with the situation*”. This does not mean they agree, approve, or accept it. They will not strongly voice their disapproval. They will not buy in, and may resist in other non-confrontational ways. They will make a shallow agreement to keep the peace since they want to meet their need of acceptance. They are afraid others will withhold their affections or approval. They seek the support of others. Their self-confidence can appear hinged on this. When tension confronts them, they seek reassurance from others... preferably another amiable. Under tension they feel intense pressure and have difficulty expressing themselves.

### **Analytical < > Avoid**

Analyticals are individuals who dislike anyone attacking or strongly questioning their system, method, or process of doing things. They pride themselves on accuracy, logic, order, and perfection. They feel safe in their system. They can be confronted personally since that has less affect due to their relationship orientation; but their system, logic and method are sacred. They avoid fighting, but won’t easily give in either. Their solution is to avoid tension and conflict. They want to be independent of others and not to be under obligation or influenced while involved. They rarely express feelings and put their confidence in facts, rational and critical thinking. They can be indecisive and overly concerned with details.

## Human Behavioral Styles

### *Summary*



Analyticals are detail-oriented, task-oriented, quiet, take longer to decide, ask, and show little emotion.

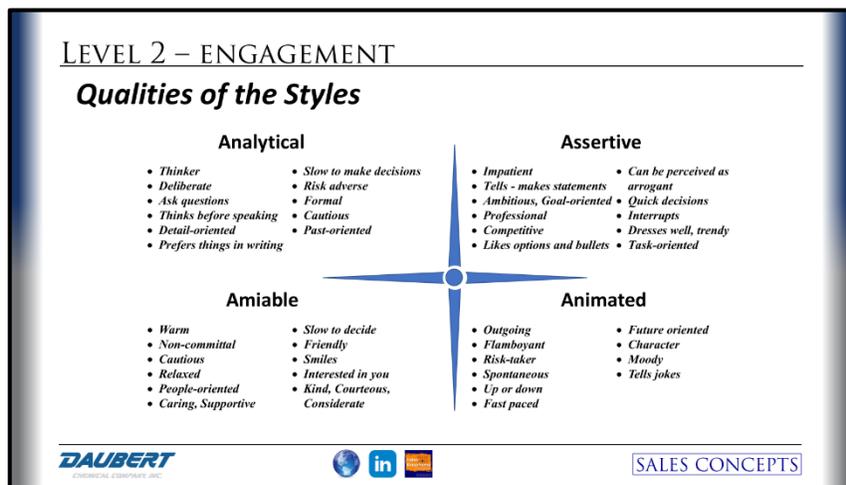
Assertives are tough, task-oriented, go-getters, always on the go, finger-pointers, make statements, and show little emotion.

Amiables are sociable, nice, warm, supportive of others' ideas, easy to be around, ask, and share emotions.

Animateds move fast, tell jokes and stories, are big-picture oriented, make statements, and share their emotions.

# WHAT IS SELLING, WHY DO PEOPLE BUY?

## Human Behavioral Styles



### Key points to remember:

- This is what you let the outside world see of you. Most of us are, whether we know it or not, already using a categorization of this kind. Much of this is just common sense. However, research has shown that your success in interacting with others is greatly enhanced when you use it deliberately rather than by accident.
- A and B people tell. They act on decisions quickly.
- C and D people ask. They act on decisions over a longer period.
- 1 and 2 people share little emotion. They are task-oriented.
- 3 and 4 people share facial expression, gestures, and emotion. They are people-oriented.
- There is no right style. No one style is better or worse than any other. People in all four quadrants are successful, and people in all four quadrants struggle.

*If you put your communication cycle on autopilot and treat everyone the same way, eventually you will crash.*

### Notes:

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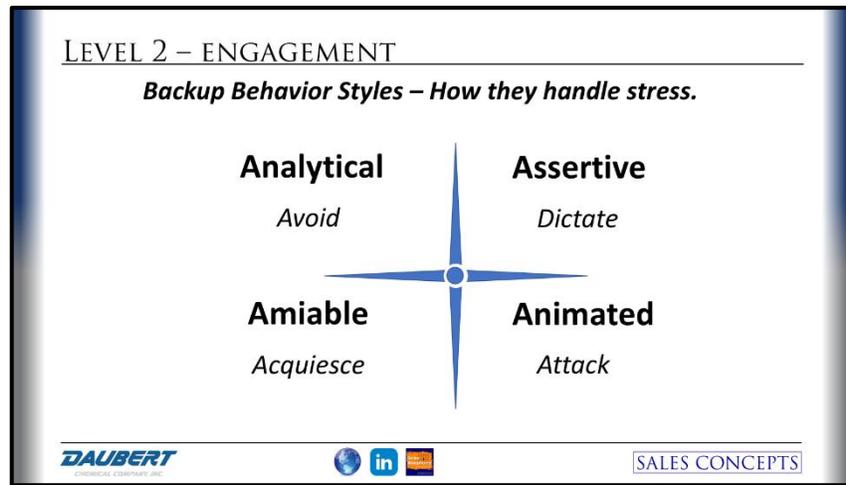
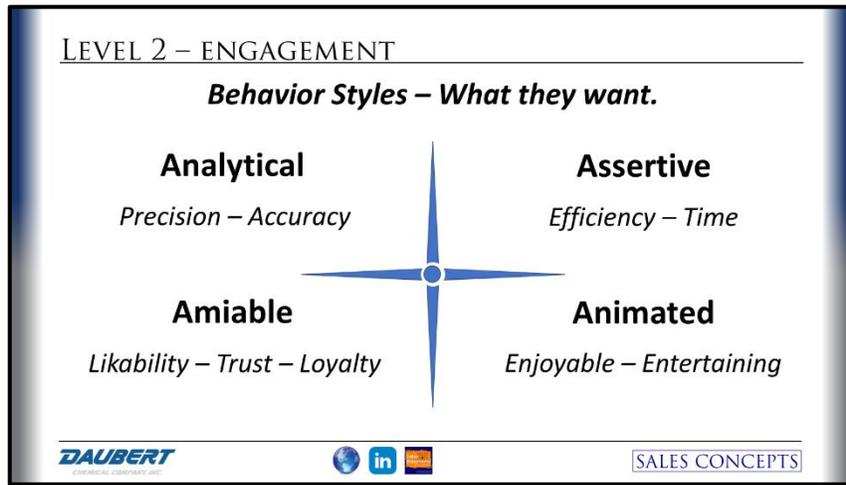
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# WHAT IS SELLING, WHY DO PEOPLE BUY?

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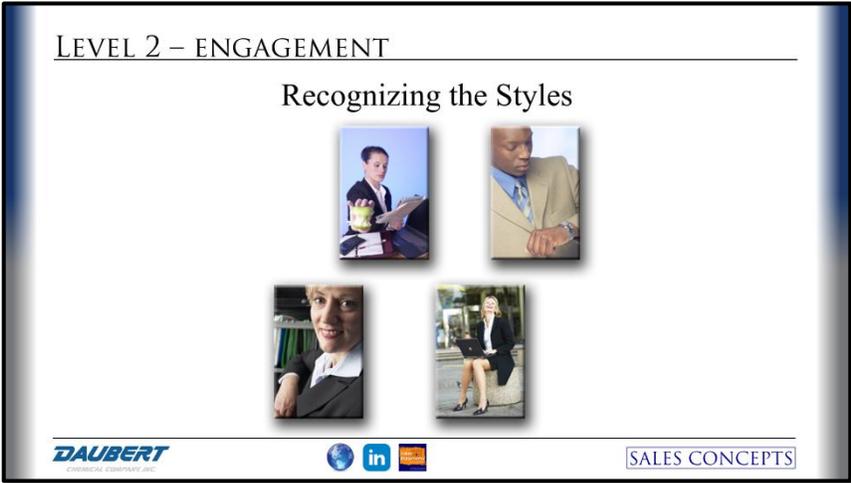
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# Recognizing Human Behavioral Styles



*Recognizing a person’s style can be accomplished quickly over the phone, by e-mail, on the Internet, or in person.*

*The same procedure is used.*

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# Recognizing Human Behavioral Styles

George


J. K.


Lara


Kevin


## Recognizing Human Behavioral Styles

### **First, look at priorities.**

Does this person show many facial expressions, express emotion, and sound friendly? If yes, this person is people (social) oriented most of the time. S/he is a 3 or 4.

Does this person show little facial expression or emotion and sound guarded? If yes, the person is task-oriented most of the time. S/he is a 1 or 2.

### **Next, look at pace.**

Does this person ask questions and make decisions slowly most of the time? If you think the person asks questions and makes decisions slowly, most of the time, he is a C or D.

Does this person make statements and make decisions fast? If you think the person moves fast and tells most of the time, she is an A or a B.

### **Now, combine the two dimensions.**

If you think a person emotes and asks questions most of the time, she would be an amiable.

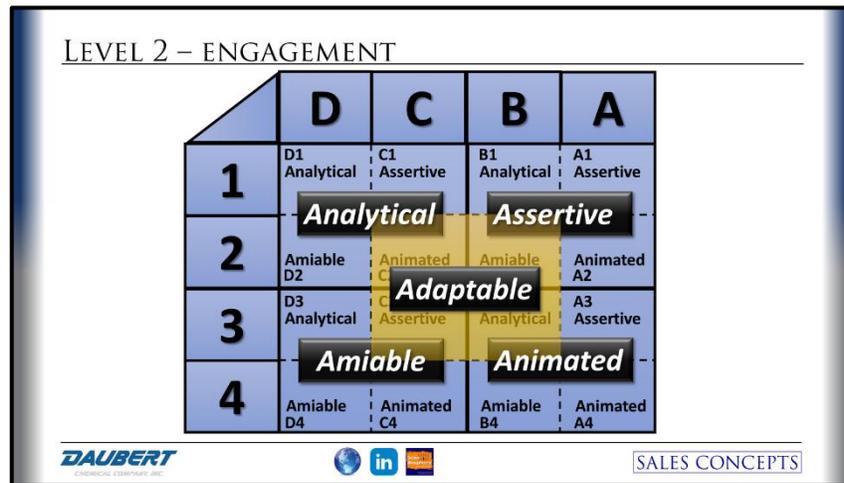
If you think a person is task-oriented and makes statements most of the time, he is an assertive.

If you think a person emotes and makes statements most of the time, she is an animated.

If you think a person is task-oriented and asks questions most of the time, he is an analytical.

The closer one gets to the center of the grid, the more one exhibits traits of all the styles. This is the 5th style and consists of the four middle squares. These people are adaptable. These people are near the center of the grid. They may exhibit traits of each style. Adaptables can be whatever they want, whenever they want. Some people think this is an excellent place to be. The negative is that no one knows where they stand. They can come off as manipulative.

## Recognizing Human Behavioral Styles



### Key points to remember:

- An analytical is task-oriented and asks questions.
- An assertive is task-oriented and makes statements.
- An amiable is people-oriented and asks questions.
- An animated is people-oriented and makes statements.
- It is not what is said, but how it is said.

Does the person speak quickly or slowly?  
Does the person ask questions?  
Does the person give concise or long-winded answers?  
Does the person show a lot of facial expression or a little?

*This is Easy. This is not Rocket Science.  
Just Think.*

*Do they move **quickly** or **slowly**?*

*Are they **task-oriented** or **people-oriented**?*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Leading the Styles

LEVEL 2 – ENGAGEMENT

*Leading the Styles*

- *Assertive*
- *Animated*
- *Amiable*
- *Analytical*

DAUBERT CHEMICAL COMPANY, INC. | SALES CONCEPTS

*Use different strategies for each style.*

*If you use the same strategy with all of your customers,  
you are going to crash.*

Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Leading the Styles

What should you do for an assertive?

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What should you do for an animated?

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Leading the Styles

What should you do for an amiable?

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What should do for an analytical?

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

## Selling to the Styles

LEVEL 2 – ENGAGEMENT

**Leading an Assertive**



- *Make an Appointment*
- *Be on Time*
- *Get Down to Business*
- *Control Your Emotions*
- *No Stories*
- *Be Specific*
- *Use Proposals*
- *Give Options*

DAUBERT SALES CONCEPTS

LEVEL 2 – ENGAGEMENT

**Leading an Animated**



- *May Be Up or Down - Why?*
- *Allow Plenty of Time*
- *Expect Them to Change Minds*
- *Record Details*
- *Talk About Others' Successes*
- *Get Involved in Their Dreams*

DAUBERT SALES CONCEPTS

LEVEL 2 – ENGAGEMENT

**Leading an Amiable**



- *Be Friendly and Interested*
- *Don't Jump to Business Too Quickly*
- *Make Suggestions to Get Ideas*
- *Be Aware of Feelings*
- *Show How YOU will Support Them*
- *Confirm Commitment*
- *Don't Push*
- *Reduce the Risk of Failure*

DAUBERT SALES CONCEPTS

LEVEL 2 – ENGAGEMENT

**Leading an Analytical**



- *Expect Questions*
- *Present and Validate Facts*
- *Additional Meetings for Details*
- *Take Your Time*
- *Low Key*
- *Don't Push or Interrupt*
- *Accept More Responsibility*
- *Emphasize Technical Support*

DAUBERT SALES CONCEPTS

## Behavioral Points to Remember

- A doorway to communication – uniqueness extends far beyond the Behavioral Styles model.
- Use to create win-win relationships.
- There is no good, bad, right, or wrong behavioral style.
- Your behavioral design is a combination of the two dimensions of priority and pace.
- Every person can adapt.
- Treat people the way they want to be treated.

## Notes:

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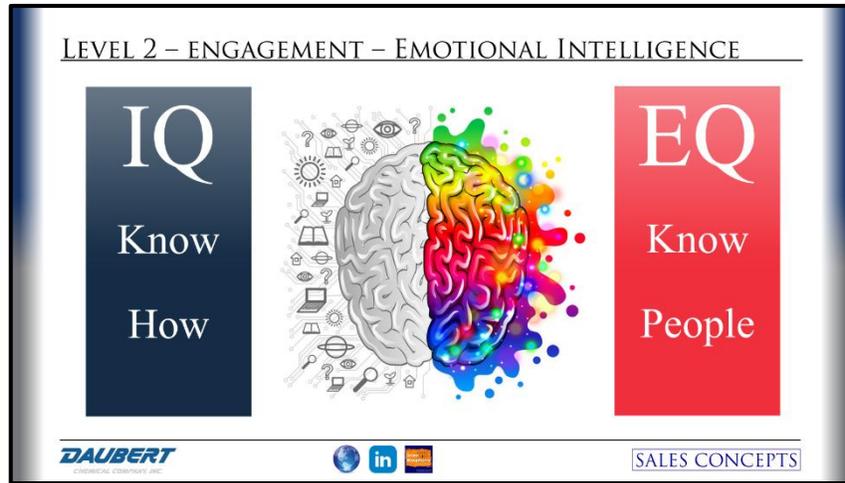
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## Emotional Intelligence



“You will continue to suffer if you have an emotional reaction to everything that is said to you. True power is sitting back and observing things with logic. True power is restraint. If words control you, that means everyone else can control you. Breathe and allow things to pass.”

### What is emotional intelligence?

Emotional Intelligence (EQ) is the ability to recognize and manage one’s emotions and the emotions of others. Individuals with a high EQ can identify how their emotions influence their behavior. Once EQ is developed, people can control how they conduct themselves in interpersonal relationships, increasing their effectiveness.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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There are two main components to EQ:

## How your emotions affect yourself

- Self - Awareness
- Self - Regulation
- Motivation

## How your emotions affect others

- Social - Awareness
- Social - Regulation

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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**Self-awareness:** Recognize and understand your moods, emotions, and drives, as well as their effect on others.

**Self-regulation:** Control or redirect unsettling impulses and moods. The inclination to suspend judgment—to think before acting.

**Motivation:** A passion for working for reasons far beyond money or status.

**Social Awareness:** Read and understand other people’s emotional makeup and respond accordingly.

**Social Regulation:** Managing relationships and building networks.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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LEVEL 2 – ENGAGEMENT – EMOTIONAL INTELLIGENCE

T	Before you speak	• Truthful
H		• Helpful
I		• Inspiring
N		• Necessary
K		• Kind



DAUBERT SALES CONCEPTS

## “THINK” Before You Speak: A Simple Standard for Better Conversations at Work

Words can solve problems or create them. In fast-moving conversations, e-mails, and meetings, a small pause can prevent big messes. The THINK framework is a practical filter to use before you speak or hit send: Is it Truthful, Helpful, Necessary, and Kind? When you practice THINK, you raise the quality of every interaction and build a reputation for clarity, credibility, and respect.

### T — Truthful

Start with accuracy. Share facts you know, label opinions as opinions, and verify details before repeating them. Truth builds trust; half-truths and assumptions erode it. If you’re unsure, say so and commit to follow up. Precision doesn’t slow you down; it prevents rework and protects your credibility.

Try this: Replace “Everyone is upset about pricing” with “Three customers raised pricing concerns this week; here’s what they said and what we did.”

### H — Helpful

Aim your words at progress. Helpful communication clarifies, guides, or equips others to act. It adds context, suggests options, or asks a focused question that moves things forward. Venting may feel good, but it rarely helps.

Try this: Instead of “This report is confusing,” say, “These two charts overlap. Could we combine them and add a one-sentence takeaway?”



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## How to Develop Emotional Intelligence

LEVEL 2 – ENGAGEMENT – EMOTIONAL INTELLIGENCE

How to improve emotional intelligence



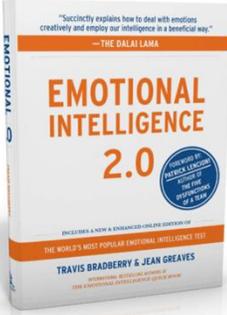
- Realize it's important.
- Solicit, value, and use feedback.
- Be open to change.
- Don't automatically reject new ideas or circumstances.
- Evaluate how you react under stressful situations. Avoid panic!
- Read books. Study. Pursue growth.

**DAUBERT**  
CHEMICAL COMPANY, INC.



SALES CONCEPTS

LEVEL 2 – ENGAGEMENT – EMOTIONAL INTELLIGENCE



**EMOTIONAL INTELLIGENCE 2.0**  
TRAVIS BRADBERRY & JEAN GREAVES

SALES CONCEPTS

## Overcoming Resistance with Emotional Intelligence

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## SELF-AWARENESS

*The ability to recognize and understand your moods, emotions, drives, and their effect on others.*

- Practice self-reflection by identifying and naming your current emotional tone. Once you identify the emotion, describe it aloud or write it on paper.
- To improve your ability to self-assess, ask a family member or trusted advisor to describe your strengths and weaknesses. Compare with your self-assessment.
- Pay attention to your behaviors and see if you recognize patterns throughout the day.
- Reflect on the connection between your emotions and your behavior.
- Write in a journal about your emotional responses to situations that were significant.
- Share your introspective discoveries and the impact of your decisions with a family member, friend, or trusted advisor.
- Make a list of your strengths and areas for improvement. Look at it daily.
- Create an action plan to develop the areas you want to improve.
- Think of situations in which you made progress on an area you wish to develop, especially in the workplace.
- Identify three specific, measurable goals for improving your self-awareness and revisit these goals monthly.
- Continue to practice the realistic perspective you are developing.

## SELF-REGULATION

*The ability to control or redirect disruptive impulses and moods, and the propensity to suspend judgment and think before acting.*

- Practice self-restraint by listening first, pausing, and then responding.
- Learn to step away from difficult or overwhelming situations.
- Be committed to not interrupting others.
- When frustration has occurred, summarize the situation to determine triggers.
- Role-play effective responses to a stressful situation with a family member, friend, or trusted co-worker (use examples of workplace circumstances).
- Determine activities that improve your mood and act when stressed or overwhelmed.
- Focus on events that provide a sense of calm or elicit positive emotions.
- Keep a log of your effective and ineffective self-management skills to recall them in future situations.
- Discuss ways of expressing emotions appropriately with your co-workers.
- When negative emotions take over, visualize a positive or calming scene.
- Put things in perspective. Ask yourself, “What is the worst that can happen?” or “How will I feel about this a week from now?”

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## MOTIVATION

*A passion to work for reasons beyond the external drive for knowledge, utility, surroundings, others, power, or methodology is based on an internal drive or propensity to pursue goals with energy and persistence.*

- Document specific goals with target dates and revisit them regularly to ensure you are on track to achieve them.
- Post your goals and aspirations in a place where you will see them every day.
- Schedule time each day to reflect on your progress toward your goals.
- Envision someone you know who models internal motivation, then develop those traits in yourself.
- Celebrate when you achieve one of your goals and document your success.
- Conduct a strengths, weaknesses, opportunities, and threats analysis of your long-term goals to ensure success.
- Challenge the status quo and make suggestions for improvement.
- Define qualities that may hold you back from attaining your goals and brainstorm ways to overcome them.
- Share your goals with a trusted advisor, family member, or friend, and ask them to help hold you accountable for reaching them.
- Spend time visualizing the achievement of your goals.
- Create detailed objectives to reach the overall goals.

## SOCIAL AWARENESS

*The ability to understand the emotional makeup of other people and how your words and actions affect others.*

- Attempt to predict and understand the emotional responses of others before communicating your point of view.
- Observe nonverbal behavior to evaluate the emotional temperature of others.
- Analyze and understand things from others' perspectives before responding to your peers at work or family members.
- Think about people and ask yourself, "What is their emotional state?"
- Continue to develop interpersonal habits, such as listening to others until they finish thinking before asking questions or making statements.
- Observe body language for nonverbal messages being expressed.
- Seek clarification from others when attempting to interpret emotional responses.
- Be nonjudgmental in your interactions with others. Ask questions before concluding.

Offer assistance to your friends, family, and even strangers on occasion. Be careful to give the assistance they seek, rather than what you think they need.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 2 ENGAGEMENT

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## SOCIAL REGULATION

*The ability to influence the emotional clarity of others through proficiency in managing relationships and building networks.*

- Consider traits you admire in other people you know and ask them for feedback about yourself in those areas.
- Identify areas of social interactions that may make you uncomfortable and ask a trusted advisor to help improve in these areas. This may also be the case for others. Understanding how to manage these interactions can affect outcomes.
- Consider the unique capabilities of those you interact with and how you can further encourage these traits in them.
- Pursue quality, rather than quantity, in your social bonds. Converse with others on an even deeper level.
- Remember unique facts about others. This is a great way to keep the communication moving in the direction you want.
- Take notice when emotions are taking over an interaction and then find ways to improve the emotional tone of the situation.
- Talk about your feelings about work and personal circumstances with a trusted advisor, family member, or friend to understand their effects.
- If you have a miscommunication or negative interaction, take accountability quickly and find ways to make sure the situation does not go red.
- Demonstrate curiosity about others and their well-being and consider ways you may assist.
- Consider ways you may be able to provide positive feedback to help others improve.
- Join a professional association or special interest group to practice building positive emotional bonds to help manage situations.

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## Overcome Resistance and Create Buy-in with Emotional Intelligence



*“Solve problems and successfully work with customers in stressful situations.”*

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# Level 3 – Advancement



*“Leaders advance only when they apply the principles of leadership.”*

# Asking Insightful Questions

*Engage and Generate Interest*



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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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Something to think about: “What separates successful people from mediocre ones?”  
What do you believe are the top three traits of a highly successful leader?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

How about “*Curiosity?*”

We believe curiosity is essential for excelling in any job and for doing it better, because when you are curious, you ask questions, learn from others, and seek innovative ways to improve your work and support others. If you show greater interest in your work, you indicate that you care and want to learn and advance.

Quote:

*“Our world is drowning in a sea of self-centeredness. You can make yourself unique right away by leaving this ocean of selfishness and choosing to be curious about other people.”*

– John Bytheway

Curiosity is a quality that can be strengthened, but why become more curious?

- You become more likable
- You have stronger relationships
- Improves the quality of your life
- Improve your health
- You become happier
- Personal Growth
- It helps you learn almost anything
- Gain a better understanding of yourself and other people

*Questions open minds.*

*Statements close minds.*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## How to become more curious:

- Call new people. Do something different.
- Ask different questions.
- Be willing to ask seemingly dumb questions.
- Listen without judgment.
- Resist the temptation to interrupt.
- Be present. Don't worry about the future or the past. Just be in the moment.
- Do things you don't know how to do. Push you out of your comfort zone.
- Put other people before yourself. Ask yourself: what do they want and why?
- Consume information from sources with which you disagree.
- Read widely.
- Be willing to be wrong. Be eager to learn and grow.
- Be willing to admit you don't know.
- Quit trying to be an expert . . . even though you may be!

## Three questions all followers ask, which you must answer:



- Can I trust you?
- Can you help me?
- Do you care for me?

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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Why ask questions?

- Gain Information
- Uncover concerns, objections, and perceived risks
- Confirm understanding
- Validate assumptions
- Avoid Mistakes
- Establish Credibility
- Establish Value
- Create Interest
- Move the process forward



Why don't we ask questions?



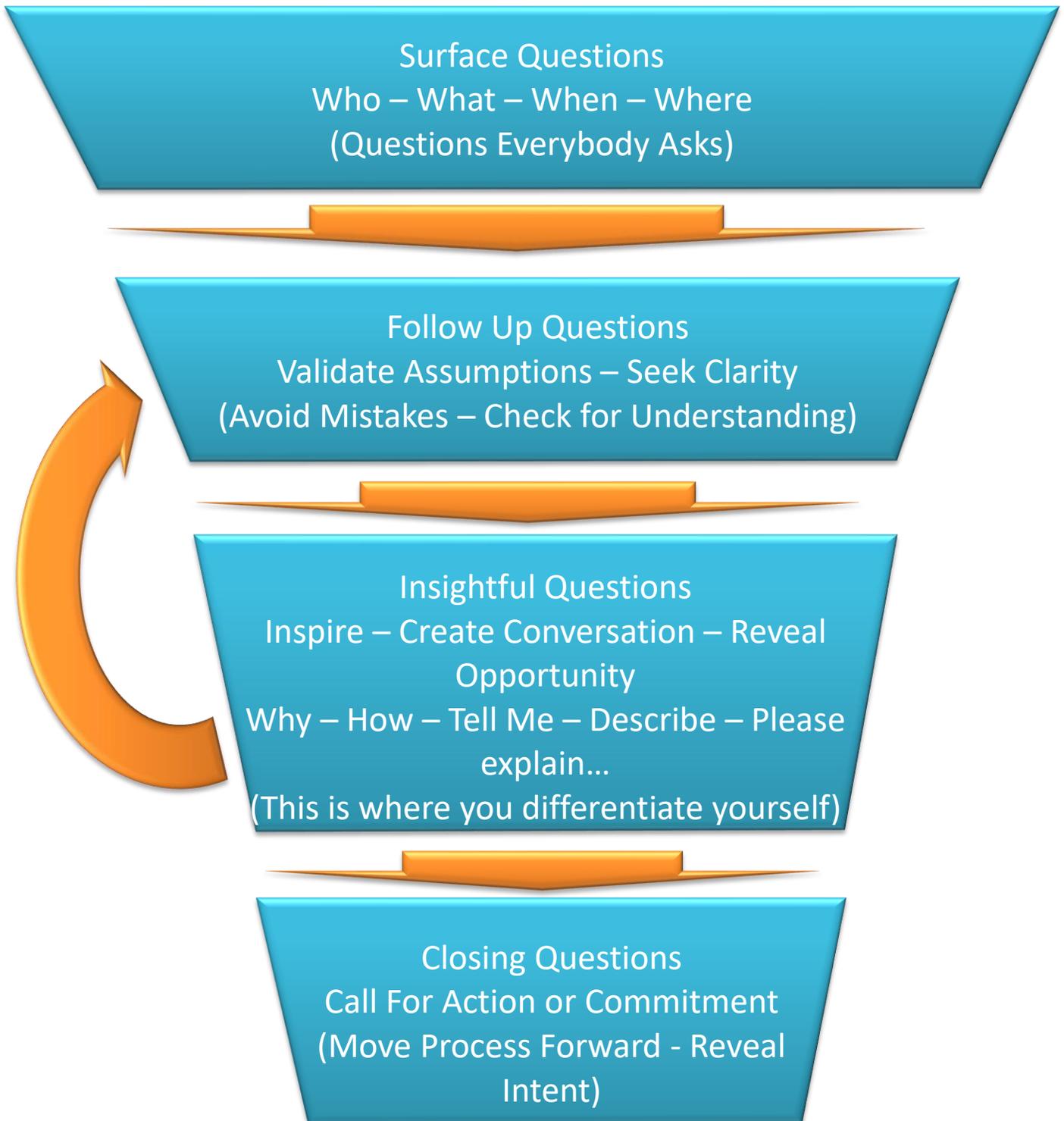
- Assumptions
- Too busy. Not enough time.
- Not listening
- Lack of understanding
- Not wanting to look foolish
- Afraid of the answer
- Lack of interest
- Lack of caring
- Lack of preparation

*Guard against assumptions! If you don't  
know exactly what your customer  
means... ASK!*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## QUESTIONING FUNNEL



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## Examples

### Surface Questions

- ✓ What is your timeline for making a decision?
- ✓ When do you want to get underway?
- ✓ What is your total budget?
- ✓ How may I assist you today?
- ✓ What does your business do, and what is your role there?
- ✓ Who is my competition?

#### Results

- Everyone asks them.
- Not detail-oriented.
- Don't lead to many follow-up questions.
- Don't get the customer to open up.
- Are often answered with one word or sentence.
- Don't cause your customers to think very hard.

### Follow-Up Questions

- ✓ So, what you're saying is...
- ✓ Can you tell me more about that?
- ✓ Let me see if I understand...
- ✓ Is there anything else you want to add...
- ✓ Can you say that again? I want to make sure I get it right.
- ✓ How does that impact...

#### Results

- Go deeper by asking follow-up questions.
- Coming up with a great list of questions is only the first step. It's the follow-up questions that will really tell you who you're dealing with.
- For example, "if you find out they like dogs, take it a bit deeper by asking them what they like most about their dog or what kind of dog is their favorite and why?"
- In answering, they are revealing a little more about themselves and their preferences.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## Insightful Questions

- ✓ Aside from all that, what else is there keeping you from...?
- ✓ How can I make the process easier for you?
- ✓ To be of the best help with all the resources we have. May I ask what is driving this directive?
- ✓ What can we do to help you please your customers' customers?
- ✓ What could we do to help you set your company apart from your competition?
- ✓ Have you experienced a service issue or issues in the past that you could share with me so I can take extra steps to ensure those types of details are addressed before we begin?
- ✓ How are you going to measure the success of this endeavor?

## Results

- Deeper Questions: Why... How... Tell me... Describe...
- Should... Would... Could... What if?
- Ask about their Knowledge, Feelings, Opinions, or Thoughts
- Ask for explanations. Could you please explain...
- Create conversation because they lend themselves to follow-up questions.
- Come in many forms.
- May not be easily answered.
- Cause your customers to think.
- Allow them time to formulate and answer. Silence is good!

## Closing Questions

- ✓ What do you think?
- ✓ What concerns do you have at this point?
- ✓ Shall I send you a contract/quote?
- ✓ Are you ready to move forward?
- ✓ Are you ready for me to send you the contract now?
- ✓ Do we meet your expectations? Let's get your order in now.
- ✓ Would you like to schedule a demo or evaluation?
- ✓ Since you seem to like what you see, shall we move forward?
- ✓ Are there any decisions that need to be made today?
- ✓ Is there anything else besides that keeping you from moving forward?

## Results

- Closing Questions – Questions that call for action or reveal intent.
- Short words – Short Questions. Then Quiet! Use short words like, Do..., Is..., Would you...? May I...?, Can we...?

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## LISTENING TO LEAD

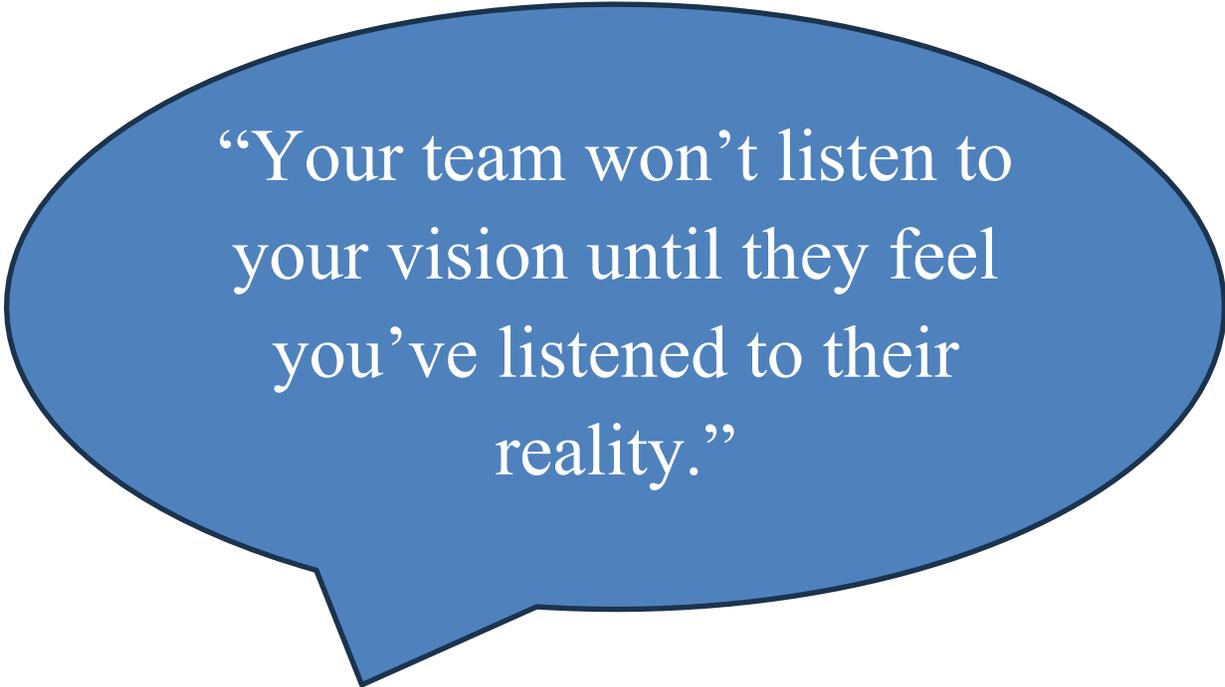


*“No one ever listened themselves out of a sale!”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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One of our favorite quotes about listening.



“Your team won’t listen to your vision until they feel you’ve listened to their reality.”

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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The [Dunning-Kruger Effect](#) postulates that those who are least competent at a task often incorrectly rate themselves as high performers because they are too ignorant to know otherwise. They don't know what they don't know. Most drivers think they are better than most drivers. I've even heard it said that 90% of the drivers think they are better than 90% of the drivers. Most of us believe we are better listeners than we actually are. We are not.

This bias was first described by social psychologists David Dunning and Justin Kruger in 1999.

*Listening is more than you think!*



- Don't just listen for words.
- Body language
- Tone
- Context
- Feeling – Emotions
- Perspective
- Objectives
- Meaning

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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LEVEL 3 – ADVANCEMENT

“Speech is a joint game between the talker and the listener against the forces of confusion.

Unless both sides make the effort, interpersonal communication is quite hopeless.”



Norbert Weiner

DAUBERT CHEMICAL COMPANY, INC.

SALES CONCEPTS

*No one ever listened themselves out of a sale!*

How does it make you feel when someone listens to you, really listens to you? Do you provide that kind of feeling for your prospects and customers, or anyone in your life, for that matter? Actively listening to them shows how important they are to you. Listening is a skill that improves with practice. Next time, you will know when someone says, “Where were we?”

Quote:

*“Speech is a joint game between the talker and the listener against the forces of confusion. Unless both sides make the effort, interpersonal communication is quite hopeless.”*

*Norbert Weiner*

*Effective listening occurs when there is a high degree of correspondence between the sender’s original message and the listener’s re-creation of that message.*

*Castleberry & Shephard*

Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## What is Listening?

Listen	Hear
<ul style="list-style-type: none"><li>• to pay attention to sound</li><li>• to pay attention; heed; obey (often followed by to)</li><li>• to hear something with thoughtful attention : give consideration</li><li>• to be alert to catch an expected sound</li><li>• to wait attentively for a sound (usually followed by for)</li></ul>	<ul style="list-style-type: none"><li>• to perceive sound with the ear</li><li>• to sense audio energy with the ear</li><li>• to receive information by the ear</li></ul>

- Acquiring information from others in an empathic and nonjudgmental way to
- understand their meaning.
- Questioning and restating to ensure understanding.
- Acknowledging the speaker, inviting communication to continue.
- Providing limited encouraging input and giving appropriate feedback.

Listen	Hear
<ul style="list-style-type: none"><li>• Active</li><li>• Voluntary</li></ul>	<ul style="list-style-type: none"><li>• Passive</li><li>• Involuntary</li></ul>

*“Assuming one can listen because they can hear is like assuming one can read because they can see.”*



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## Listening impacts:



- Relationships
- Self Awareness
- Professional Development
- Interpersonal Power
- Your Value to Others

## Notes:

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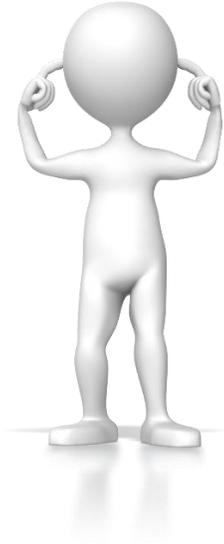
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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We know we should, but why don't we listen?



- It takes too much work
- No interest
- Not caring
- Not seeing the value
- Close-minded
- Judgmental – Emotional
- Lack of skill

*Average listening efficiency is about  
26%*

According to the work of Dr. Ralph Nichols and the International Listening Association

The [International Listening Association](#) is an organization developed to promote the study, development, and teaching of listening. The association is “dedicated to learning more about the impact that listening has on all human activity.” The ILA was founded in 1979 in Minneapolis, Minnesota, USA

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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Listen carefully for specific directions and mark the following diagram accurately.


# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## *Ways to improve our listening ability:*

- Realize it takes work.
- Work to avoid distractions.
- Listen to understand.
- Remain quiet. Don't chirp.
- Don't interrupt.
- Avoid judgment. Keep an open mind.
- Picture what is being said.
- Ask questions to check for understanding.
- Wait for a pause before clarifying.
- Work to feel what the speaker feels.
- Listen for what isn't said.
- Pay attention to their body language and eye contact.
- Listen for context. How does it fit together? What is the meaning?
- Be curious.
- We must want to listen.



## *Four Key Points to Remember to Improve Your Listening:*

1. Concentrate on what the other person is saying, not what you will say.
2. Develop a Method for Listening.
3. Focus on what the speaker truly means.
4. Ask Questions to Validate Assumptions.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 3 ADVANCEMENT

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## *Listening ideas and resources:*

- [Amazon search for books on listening.](#)

*[The Lost Art of Listening](#)* – Michael Nichols, Ph. D.

*[Just Listen](#)* – Mark Goulston

*[Everyone Communicates, Few Connect](#)* – John Maxwell

- [International Listening Association.](#)
- [Search and read articles on listening.](#)
- [Search for listening exercises on Youtube.](#)
- Get an accountability partner.
- Ask for help.

*No one ever listened themselves  
out of a sale!*

Notes:

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## Some final thoughts about listening...

A sales manager's greatest influence is not in the answers they give, but in the questions they ask.

Your team's thinking expands or contracts based on the quality of the questions you listen for. When you listen beyond the surface into the assumptions, fears, and logic behind a rep's decisions, you elevate their judgment, not just their activity.

Listening is how a sales manager separates skill issues from will issues.

Most performance problems look the same on the surface. Only deep listening reveals whether the challenge is mindset, method, or motivation, and each requires an entirely different response.

A manager who listens well builds a team that listens well, and customers feel the difference.

Your listening becomes the standard that the team naturally mirrors with customers. When salespeople feel heard, they develop the habit of making customers feel heard, which shortens sales cycles and strengthens loyalty.

# Level 4 – Destiny



*“Servant leaders lead with a clear sense of destiny.”*

# Objective Forecasting

*The only way to get to where we want  
to go is to know where we are.*



Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## LEVEL 4 – DESTINY

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What is forecasting?

Why should we care?



SALES CONCEPTS

## LEVEL 4 – DESTINY

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Your sales forecast is the most critical piece of meeting your quota. An objective forecast helps you spot trouble while there's still time to mitigate it or avoid it altogether. Without accurate sales forecasts, you could be trending below quota without being able to adapt.



SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

## What is forecasting?



**fore·cast**  
verb    gerund or present participle: **forecasting**

**Predict or estimate (a future event or trend).**  
"Snow is forecast for eastern Ohio."

To calculate or predict (some future event or condition) usually as a result of study and analysis of available pertinent data

Forecasting is the process of making predictions based on past and present data. Later these can be compared (resolved) against what happens.

A prophecy, estimate, or prediction of a future happening or condition

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**SALES CONCEPTS**

Initially, you might think forecasting determines the probability and timing of closing a deal. Then we must consider the sale's value. Is it one project or the aggregate of all potential business? Is there a deadline? For example, a forecast for the next quarter or the next year? It turns out there may be more to forecasting than meets the eye.

LEVEL 4 – DESTINY

## Why forecast? What is the impact?



- Helps your company plan for the future.
- Helps leadership adjust to changing markets.
- Helps management set accurate quotas or goals.
- Helps set production goals and allocate resources.
- Strong forecasts inspire everyone in the company.

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**SALES CONCEPTS**

In an ideal world, forecasts help production produce the right amount of inventory, and executives plan from a financial perspective, anticipate cash flow, and determine how to invest for the future.



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## The perspective of the Salesperson

LEVEL 4 – DESTINY

### The Salesperson

- Forecasts often seen as pressure.
- Frequently just guess work.
- The tendency to under-project.
- The sandbagging factor.
- Effect on end compensation.

DAUBERT SALES CONCEPTS

What are some of the perspectives of the salesperson when it comes to forecasting? What do they think of it? What is important to them?

1. Virtually all sales professionals feel that forecasting is a form of pressure. Salespeople view forecasts as a form of commitment. Many want to avoid being held accountable.
2. All too often, the salesperson doesn't take the forecasting process seriously. It requires thought and preparation. Significant research is often necessary to forecast accurately.
3. No salesperson gets praise for missing the mark. On the other hand, virtually all salespeople are praised when they exceed the projection; it's seen as clever to sandbag or underestimate.
4. Far more severe is holding back on business that is all but assured or sometimes under-projecting the amount or timing to be a hero.

Most organizations have no direct consequences for a salesperson who misses their quota. Too often, it is seen by all parties as no big deal or something that will 'blow over.' No real consequences occur.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## The perspective of the Manager

**LEVEL 4 – DESTINY**

### The Manager

- Forecasts are often seen as pressure.
- Frequently based on instinct, not data.
- Openness with upper management.
- Are they optimists or pessimists?
- What is the effect on compensation?
- The effect on upward mobility.

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**SALES CONCEPTS**

How do managers see forecasting? How is it different for a manager than from the team's perspective?

As with salespeople, managers feel pressure from above. Even more so in some cases. Forecasting is not ordinarily a happy time. Committing is a factor.

Too often, experienced managers rely on their experience and instinct, which is seldom as objective as data. Data cannot just be historical; it must also include effective current and future perspective criteria.

Few forecasts are entirely accurate. Wherever one is in the chain of command, one tends to underpromise and overdeliver. This otherwise admirable quality often takes on negative and harmful overtones. No one trusts anyone; no one's word is their bond. Wherever the buck stops, that person depends on those below to tell (and forecast) the truth. Most leaders can deal with good or bad news; they just don't want to be surprised.

Most salespeople fall into one of two categories: Either they are optimists who will sell everyone everything every time, and need this hyperbole to deliver whatever that final number may be. Or they are pessimists who will never sell anything to anyone, and need this attitude as a form of preconditioning for their failure. Of course, it's difficult to be disappointed when you predict your failure in advance. However, we should remember that while this is primarily a defense mechanism, there are true pessimists who seem to have a problem with every solution!

There may or may not be penalties for managers depending on their compensation programs for poor projection and forecasting performance. However, the manager who delivers on their promises has the keys to the kingdom.

It isn't easy to advance in the organization without the ability to be depended upon, particularly when it comes to forecasting. One might be able to remain in one's position with a mediocre record, but one is highly unlikely to be promoted.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## The perspective of the Executives

LEVEL 4 – DESTINY

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### The Manager's Manager

- Generally, it's all about the numbers.
- Seeks consistency and continuity.
- Is often competing with peers.
- 1st Priority: Remove obstacles.
- 2nd Priority: Remove excuses.
- Developing bench strength.



**DAUBERT**    SALES CONCEPTS

An essential piece of the puzzle, perhaps the most important, is seldom addressed when one encounters the subject of forecasting. You are, by definition, a middle manager when you have people who report to you, and you, in turn, report to someone else. At this level, numbers are often all that matter; there is no place for excuses or extenuating circumstances; you either win or lose, and there are no ties. Nothing drives management crazier than uncertainty and ups and downs. Upper management and executives prefer slow, steady progress over extreme highs and lows.

Executives usually have peers with whom they may compete for accolades, promotions, the boss's ear, and ego gratification. Therefore, nothing is more important than removing obstacles that keep people from succeeding. Once that is done, the people must be held accountable; the manager must be good at detecting assumptions and false premises, dispatching them, and being known for this trait.

Even with the emphasis on numbers, upper management looks to this level to supply depth for either replacing poor performers, retirees, or expansion. The manager with the strongest team is in the best position with the C Level.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

## How does forecasting help you?

- Accelerates sales cycle.
- Find and address weaknesses.
- Help you build a proactive plan.
- Highlights what's missing.
- Helps management know how to support you.



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SALES CONCEPTS

Everyone involved in the process feels some pressure when it comes to forecasting. Information is power; the more information you have, the better your ability to forecast. So how do you get information? By asking questions.

LEVEL 4 – DESTINY

## What are the challenges of forecasting?

- Hard to predict the future, economy, and market conditions.
- Lack of experience, history, or data.
- Subjective bias in the seller's mind.
- Not understanding or recognizing signals.
- Not working with a forecasting mindset.
- General uncertainty
- Not fully utilizing tools such as software or CRM.
- Lack of commitment – follow through



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SALES CONCEPTS

The challenging part of asking questions is coming up with them. The best way to develop insightful questions is to consider the customer's perspective and approach all customers and prospects with a forecasting mindset.



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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What we need is an inventory of what is required to forecast. We suggest that there are 14 items we must fully understand to forecast objectively at any level.

LEVEL 4 – DESTINY

We must take a



*“forecasting inventory”*

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

We must know where we stand to forecast. We must understand which of the items are missing.

LEVEL 4 – DESTINY

So, what do we need?



And how do we get it?

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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The fourteen components of winning business are the following:

1. The need is identified and valued.
2. Target close or implementation date established.
3. Is the customer responsive?
4. Is the budget allocated?
5. Preliminary pricing has been discussed.
6. We have obtained positive feedback on the preliminary pricing
7. There is agreement upon tentative details.
8. The economic buyer is identified.
9. Is this prospect a previous or current customer?
10. There are no significant obstacles perceived with the proposal.
11. All technical validation has been completed.
12. Some competition has been eliminated.
13. Do we have a consensus among multiple people in the organization?
14. Have we gotten approval from the economic buyer?
15. Have we negotiated the final pricing?

## LEVEL 4 – DESTINY

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### What we need to forecast winning business?



1. Need has been identified.
2. Target close or implementation date established.
3. Is the customer responsive?
4. Budget is allocated?
5. Preliminary pricing has been discussed.
6. We have obtained positive feedback on preliminary pricing
7. There is agreement upon tentative details.
8. The economic buyer is identified.
9. Is this prospect a previous or current customer?
10. There are no significant obstacles perceived with the proposal.
11. All technical validation has been completed.
12. Customer accepts your unique value proposition. Some or all competition has been eliminated.
13. Do we have a consensus among multiple people in the organization?
14. Have we gotten approval from the economic buyer?
15. Have we negotiated the final pricing?

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SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

We have to know where we stand!



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SALES CONCEPTS

Understanding where we stand concerning the fourteen items helps us approach the sales from the customer's perspective.

Understanding where we stand also helps us to develop a plan to move forward. Knowing what we need next will help us move the sales forward. It's said that ABC stands for "always be closing." While it may not be realistic to close for the business in a capital-intensive, multi-faceted business-to-business environment, it is certainly reasonable to close for the next step. Knowing where you stand helps you determine what's next.

Earn the right to close with the questions you ask!

LEVEL 4 – DESTINY

Closing Business Doesn't Just Happen!



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SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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Try this. Write down precisely what you want your customer to say at the end of the call, and you will always be able to tell if you are on course throughout the call.

LEVEL 4 – DESTINY

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We must have a plan for closing.



What is it *exactly* that you want to hear from your customer at the end of the call?

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

Always be closing – for something!

LEVEL 4 – DESTINY

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DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

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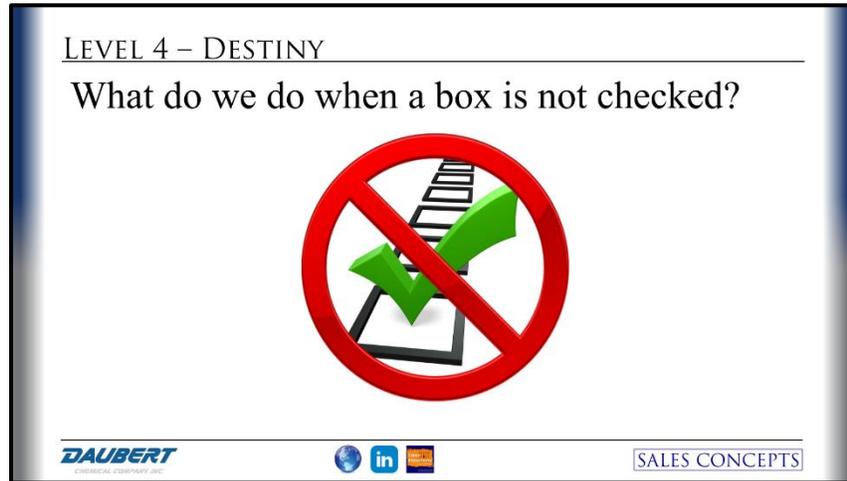
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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What do we do when we can't check a box?

1. The need has not been identified.

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2. The target close or implementation date is not established.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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3. The budget is not allocated.

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4. There is no agreement on a tentative concept.

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5. Preliminary pricing has not been discussed.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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6. The economic buyer is not identified.

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7. There is no consensus among multiple people in the organization.

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8. There are no significant obstacles perceived with the proposal.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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9. Some competition has been eliminated.

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10. We have obtained positive feedback on preliminary pricing.

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11. All technical validation has been completed and agreed upon.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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12. Final pricing negotiated.

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13. We have approval from the economic buyer..

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14. The prospect is a previous or current customer.

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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15. The customer is responsive.

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### LEVEL 4 – DESTINY

#### What we need to forecast winning business?



1. Need has been identified.
2. Target close or implementation date established.
3. Is the customer responsive?
4. Budget is allocated?
5. Preliminary pricing has been discussed.
6. We have obtained positive feedback on preliminary pricing
7. There is agreement upon tentative details.
8. The economic buyer is identified.
9. Is this prospect a previous or current customer?
10. There are no significant obstacles perceived with the proposal.
11. All technical validation has been completed.
12. Customer accepts your unique value proposition. Some or all competition has been eliminated.
13. Do we have a consensus among multiple people in the organization?
14. Have we gotten approval from the economic buyer?
15. Have we negotiated the final pricing?

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SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

Forecasting and Opportunity Development				
Account/Opportunity: <input type="text"/>				
Date: <input type="text"/>				
Forecasted Revenue: <input type="text"/>				
Stage 1   Determine Need, Funding, and Timing		Weight	Status	Forecast
1	Need has been identified.	5%	<input type="checkbox"/>	
	Target close or implementation date established.	5%	<input type="checkbox"/>	
	Budget is allocated?	15%	<input type="checkbox"/>	
	There is agreement upon tentative concept.	5%	<input type="checkbox"/>	
Stage 2   Determine Price and Decision Maker				
2	Preliminary pricing has been discussed.	5%	<input type="checkbox"/>	
	The economic buyer is identified.	5%	<input type="checkbox"/>	
Stage 3   Gain Momentum and Remove Obstacles				
3	There is a consensus among multiple people in the organization?	5%	<input type="checkbox"/>	
	There are no significant obstacles perceived with the proposal.	5%	<input type="checkbox"/>	
	Some competition has been eliminated.	5%	<input type="checkbox"/>	
	We have obtained positive feedback on preliminary pricing.	5%	<input type="checkbox"/>	
Stage 4   Secure Commitment				
4	All technical validation has been completed and agreed upon.	5%	<input type="checkbox"/>	
	Final pricing negotiated.	5%	<input type="checkbox"/>	
	We have approval from the economic buyer.	10%	<input type="checkbox"/>	
Stage 5   Close the Sale				
The prospect is a previous or current customer.		10%	<input type="checkbox"/>	
Customer is Responsive.		10%	<input type="checkbox"/>	
Current Forecast Total:				
Current Forecast Value:				-
<small>Developed by Sales Concepts, Inc. - Roswell, GA USA</small>				

For the workshop, complete this form for your top three opportunities.

Download the worksheet here:



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## LEVEL 4 – DESTINY

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### What we recommend you do now:



- Approach your customers and prospects with a forecasting mindset.
- Customize the spreadsheet to your business criteria.
- Contact us should you want help. We are always thrilled to hear from you.
- Follow SCI on LinkedIn if you are not already for tips and ideas on how to work with your customers.
- Be prepared to SUCCEED!



SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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## Distinguishing short-term forecasting from long-term forecasting.

Reviewing the pros and cons of different forecasting methodologies.

There are many methods one can use to prepare a forecast, each with different purposes and objectives. In this session, we evaluate the different types of forecasts and how best to use them.



- Market
- Product
- Project/Opportunity
- Region
- Timeframe

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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Developing long-term forecasts is vastly different from developing short-term forecasts. The most obvious difference is the level of uncertainty and degree of risk involved over a longer period.

List what you perceive as the potential challenges to developing accurate long-term forecasts here:

Challenges to accurate long-term forecasting:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

Growth does not happen on its own. Growth is achieved with careful planning and meaningful goals.

Thoughts and questions to ponder:

- Where are we now, and where are we going to be?
- How are we going to get there?
- Goals are the vehicle to success.
- Why it's important to have goals.
- Introduction of the process.
- Nothing happens without a goal.
- Working with intent – setting the right priorities.
- What is a goal? How do they work?
- The process of developing, setting, executing, and achieving the proper goals.
- How to pick the right accounts and allocate your time among them.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

What do we rely on to  
develop long-term  
forecasts?



SALES CONCEPTS

LEVEL 4 – DESTINY



- Data



- Instinct



SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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What type of data do we have?

LEVEL 4 – DESTINY



- Internal



- External

DAUBERT    SALES CONCEPTS

LEVEL 4 – DESTINY

## Internal Data



1. Year-Over-Year
2. Seasonal Distribution
3. Product or Offering Category
4. Territory by Territory
5. Relative Maturity of Territory
6. Upper Management Dictate

DAUBERT    SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

## Historical Results



- What's good about it?
- What's bad about it?

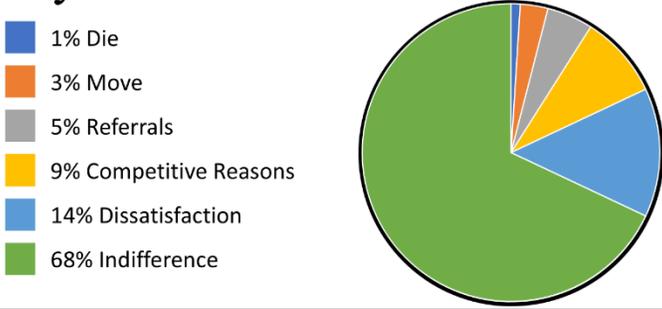
DAUBERT SALES CONCEPTS

## Why do customers leave?

According to many various sources, the average business loses about 10 to 25 percent of its customer base per year. This doesn't necessarily mean new customers are replacing the old, but rather that repeat business is diminishing and the company is spending more time, money, and resources to attract new customers.

LEVEL 4 – DESTINY

## Why do customers leave?



Reason	Percentage
Die	1%
Move	3%
Referrals	5%
Competitive Reasons	9%
Dissatisfaction	14%
Indifference	68%

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**Horrrifying!**

68% of customers leave because of perceived indifference on the part of the company.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

## What's even more horrifying is...



Acquiring a new customer can cost five times more than retaining an existing customer.  
Increasing customer retention by 5% can increase profits from 25-95%.

The success rate of selling to a customer you already have is 60-70%, while the success rate of selling to a new customer is 5-20%.

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LEVEL 4 – DESTINY

## Why do customers leave?

# Simple Math!



68% of 10 to 25 percent is 6.8% to 17%!

This means that on average 6.8% to 17% of our customers leave us every year because of perceived indifference!

**DAUBERT** CHEMICAL COMPANY, INC.    **SALES CONCEPTS**

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 4 DESTINY

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LEVEL 4 – DESTINY

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## External Data



1. Overall market trends
2. Industry-specific trends
3. What's hot? What's not?
4. What's surprising? (Good or Bad)
5. Social Media Impact
6. What does the future hold?
7. What will trailblazing look like?

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LEVEL 4 – DESTINY

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## Instinct (Gut feel – Experience)



- What's good about it?
- What's bad about it?

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# Level 5 – Efficiency



*“Positive momentum growth is attained through maximum efficiency.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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*“The main difference between successful people and people who struggle is how they use their time.”*

Your day, just like everyone else’s, is only 24 hours. Yet somehow, certain people seem to squeeze more from that time than others. What it all comes down to is time management—how you choose to plan, prioritize, and spend the hours you have.

We hope this workshop inspires you to make the most of your 24 hours every day.

LEVEL 5 – EFFICIENCY



*The main difference between successful people and people who struggle is how they use their time.*

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One of the oldest sayings ever is that time is money. It’s true in many ways. For one thing, once you spend money, it’s gone. You no longer have that money to spend on anything else. It’s called opportunity cost. It’s why we have budgets. Time is much the same. When we spend time on one activity, it is gone forever. We can only do one thing at a time. Therefore, like spending money, we need a budget for how we spend our time. We suggest you block your time on a calendar.

LEVEL 5 – EFFICIENCY

*Successful people are productive, not busy.*



DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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There is never enough time to do everything; there is always enough time to do the most important things.

- How well am I currently balancing urgent demands with my long-term priorities?
- In the past month, have I felt more “busy” or truly “productive”? Why?
- What would change in my work life if I mastered priority management?

The real advantage isn't in having more time—it's in controlling how you use the time you already have.

I often hear people who fail to accomplish a task make the excuse that they did not have time to do it. That is not true. We all have the same amount of time in our days. What we are really saying is that we did not make that task a priority. In other words, we chose to spend our time on a different activity.



*“I did not have time . . .”*

*“Yes, you did! You just chose to do something else.”*

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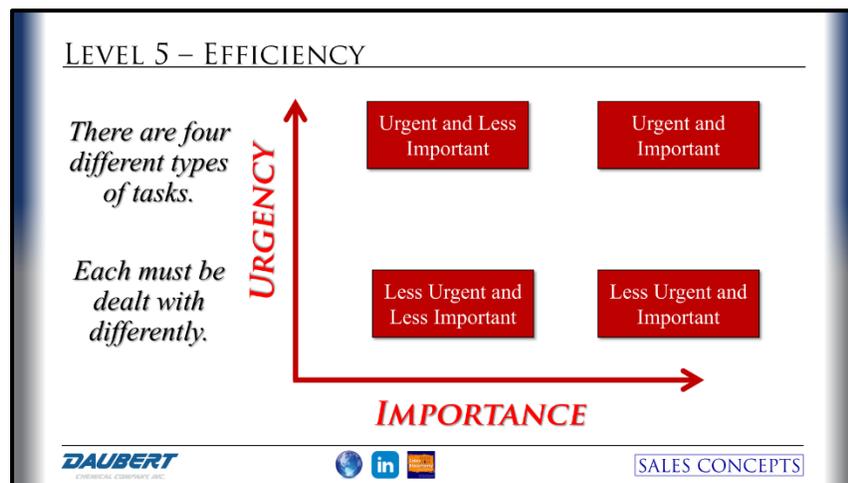
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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## The Eisenhower Matrix

All tasks can be based on two criteria, importance and urgency. Therefore, we can categorize tasks four ways.



When we look at this chart, some tasks are of low importance, as shown in the left-hand graph on the x-axis. Tasks on the left side are of low importance, and those on the right side are highly important. Then, there is urgency: the higher up the vertical y-axis, the more urgent the tasks. Now you can see urgent and important tasks. Some tasks are urgent but not as important. Importance is low, relatively speaking. You can divide all of your pending tasks into these four categories. When there is an urgent and important task, we should do it as soon as possible.

However, we do have to define the word important! What does that mean exactly? One of the most common ways to define importance is to ask yourself a couple of questions. First, what happens if I don't do this? Second, what's my highest payoff activity right now? Ask yourself, of all the things I can be doing, which one provides me with the most return on my time? It might be something that helps you save more time in the future. It might be something that enables you to make money. After you consider the importance of a task, evaluate its urgency. Work on the tasks ranked highest in both urgency and importance.

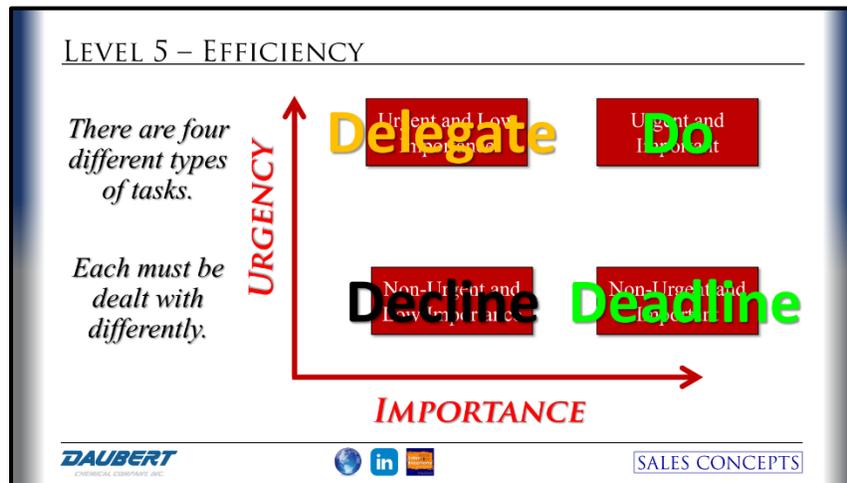
Sometimes these tasks aren't pleasant, but it's sure nice to get them out of the way. And if they're significant tasks, break them down into chunks and schedule them on your calendar so you spend maybe 30 minutes or an hour at a time working on them. If it takes you hours to do, and you can't set aside hours to do it, break it down into small bite-sized pieces. You cannot eat a nice meal in one bite.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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Get someone else to handle less important, urgent tasks. Use your time for the important tasks that matter. Have others whose time is less expensive than yours tackle lower-priority tasks.

What about the unimportant and non-urgent tasks? Drop those! The most successful people are good at saying no to things that are not important, especially if they are not urgent.



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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

LEVEL 5 – EFFICIENCY

What is your time worth?



DAUBERT SALES CONCEPTS

To allocate your time correctly, you need to know what it's worth. Do you know what your time is worth? We were talking about time being money. Let's suppose a minute is worth \$1. There are 1,440 minutes in a day. You're probably going to sleep about 8 hours. Then you've got family time, and you have dinner, you should exercise, and so forth. So when it comes down to it, how many minutes a day do you actually have to work? Let's calculate what your time is worth so you understand which activities you're spending it on are paying you back the most. Use the following formula to determine how many hours you have in a year to work or see customers.

LEVEL 5 – EFFICIENCY



Days in a Year	365
Less Weekends	-104
	261
Less Holidays	-8
	253
Less Vacation	-10
	243
Less Personal Days	-10
Workdays in a Year	233

DAUBERT SALES CONCEPTS

You have roughly 233 workdays a year. So if you work 9 hours a day, you have 9 x 233 hours to work a year, or 2,097 hours. Of course, your numbers may differ depending on how much you work. These are averages.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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*What is your time worth?*

LEVEL 5 – EFFICIENCY

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*Your time is worth approximately:*

$$\frac{\text{Your goal of } \$X}{2,097 \text{ hours in a work year.}}$$

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

Divide your goal or quota by the number of hours you have to work. That is, in round figures, the value of your time. So it's not about how much you make; it's about how much you produce.

For instance, if your sales goal is two million a year, your time would be worth \$953.74 per hour!

LEVEL 5 – EFFICIENCY

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*Your time is worth approximately:*

$$\frac{\$2,000,000}{2,097 \text{ hours in a work year.}}$$

*\$953.74 per hour*

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

Now that you know what your time is worth, you should not spend it doing anything worth less than \$953.74 per hour, or you will not accomplish your goal!

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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## *How do you allocate your time?*

Now it becomes easier to figure out how much time you should spend on specific activities. For example, how much time should you invest in acquiring \$100,000 of business? The answer is 104.9 hours, or 11.65 days, if you work nine hours per day, using the formula below.

LEVEL 5 – EFFICIENCY

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*How much time do you have to win  
\$100,000 of business?*

$$\frac{\$100,000}{\$953.74 \text{ per hour}}$$

*104.9 hours or 11.65 days.*

DAUBERT   SALES CONCEPTS

But wait! That's not all! There is more to the story. For example, suppose you only have a 50% chance of winning this business? Then, we must account for the risk to ensure all of your time is accurately recorded. So the numbers change like this: 50% of 104.9 hours is 52.4 hours. We now have only 5.8 days to secure this business. If it takes longer, we will have to make up the difference elsewhere or risk coming up short of our goal at the end of the year.

LEVEL 5 – EFFICIENCY

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*How much time do you have to win  
\$100,000 of business with 50% chance?*

$$\frac{\$100,000 \times 50\% = \$50,000}{\$953.74 \text{ per hour}}$$

*52.4 hours or 5.8 days.*

DAUBERT   SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

## *Plan and Budget Your Time for the Greatest Return*

LEVEL 5 – EFFICIENCY

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*We all have the same amount of time.*



*How will you use yours?*

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

Now that you understand the value of your time, you can use it strategically to develop longer-term plans. Block your time on a calendar. To-do lists are not as effective.

LEVEL 5 – EFFICIENCY

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Executing a Strategy

Where are you now?  
Where do you want to be?



- Short term – 1 year
  - Reach \$10M in orders
  - Land 1 major new account
- Intermediate – 2 to 3 years
  - Reach \$15M in orders
  - Land 4 more major accounts.
- Long term – 3 to 5 years
  - Reach \$25M in orders
  - Become the go to for resource for my industry

DAUBERT CHEMICAL COMPANY, INC.    SALES CONCEPTS

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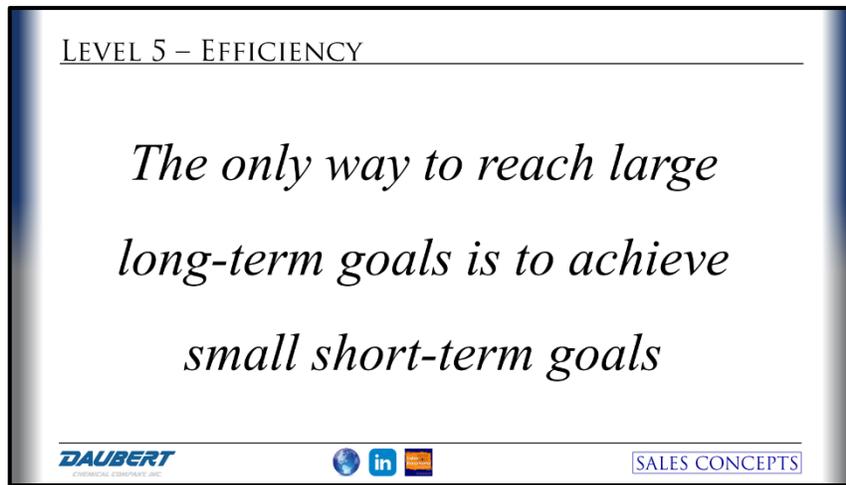
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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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What do you want to accomplish in one year? What about two to three years from now? Where do you want to be five years from today? Now is the time to start thinking about this if you are not already. Work backward from your long-term goals. Divide them up into short-term goals and review your progress regularly.



What are you going to do to get there?

Annually:

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Quarterly:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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**LEVEL 5 – EFFICIENCY**

Possible courses of action:

- Prospecting – What type of accounts?
- Networking – What events and who do you want to reach?
- Cold Calling – Use 8-Touch Plan, email marketing/sales sheets
- Social media – Maximize use of LinkedIn
- Social Call – How are you doing
- Training
- Attend any and all project meetings where we can get face time with clients
- Keep client informed on tech with emails
- Referrals
- Site surveys
- Project meetings
- Quotes – check the detail, make them look good, correct all spelling, names, scope
- process clean orders
- Follow up

Monthly:

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Weekly:

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Daily:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

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## *Successful People Set and Accomplish Goals.*

According to *Ink Magazine*, only 8% of businesspeople set and achieve goals! That's one out of every twelve people.



Most people respond to events and don't proactively plan.

Of course, when you plan, you will deviate from it. That's why you should keep a third of your time open in your calendar so that you have time to do the inevitable things that pop up throughout the day. With a third of your time open, unexpected events don't throw your whole day or week out of whack. As we budget our finances for unforeseen expenses, we must budget our time for unforeseen events.

The best way to be prepared for unexpected activities is to block time for all the tasks you want to accomplish on your calendar, and you can drag them and move them around so that at the end of the week, you've done what you want to do.

Why don't we accomplish our goals? Do you find that there are things you wanted to get done at the end of the week that aren't done? It could be for two reasons. One, you put too much into your week; you didn't properly allocate your time. In other words, you over-budgeted your time. Or two, you misjudged how long the activities would take. Either way, you have more work than time. That is why it is important to set SMART goals and to budget time strategically.

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 5 EFFICIENCY

## *Successful People Set SMART Goals*

Writing your goals, reviewing them, and putting them on your calendar helps you accomplish tasks. Unfortunately, most people lack the discipline to honor the commitments they have made to themselves. We all need a documented plan to achieve each of our goals, and that's why we need to use a calendar to allocate time for each goal.

**LEVEL 5 – EFFICIENCY**

Why don't we accomplish our goals?



3 primary reasons people don't achieve goals:

1. Failure to write them and review them.
2. Failure to develop a plan to achieve the goal.
3. Failure to commit, lack discipline to live up to the commitments.

**DAUBERT**    **SALES CONCEPTS**

So how do you know when you've set a reasonable goal? A goal is not a goal unless it is a SMART goal.

**LEVEL 5 – EFFICIENCY**

What is a goal?

Is your goal a smart goal?



**S** Specific  
**M** Measurable  
**A** Actionable  
**R** Realistic  
**T** Time-Oriented

**DAUBERT**    **SALES CONCEPTS**

SMART goals are specific. They're measurable. They require action on your part. They're something you do. They're something you control; they're proactive. They're realistic. You don't want to create a goal that you know you can't meet. "I'm going to double my sales in the next year." Well, maybe that's possible, perhaps it's not. However, ensure that the goals you set for yourself are realistic. They should cause you to stretch, but they should also be attainable. Don't make them easy. Ensure that you push yourself to realize them. Lastly, they need to be time-oriented. So, whenever you write a goal, do you follow these five criteria? Is it specific? It should cover one thing. Is it measurable? How will you know if you've done it? Is it time-bound? When are you going to achieve it?



# Level 6 – Resonance



*“A leader’s resonance is realized by  
success through exponential, sustainable,  
and lasting growth.”*

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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LEVEL 6 – RESONANCE



Create a culture of  
success with  
proactive and  
consistent coaching

**DAUBERT**  
CHEMICAL EQUIPMENT, INC.



SALES CONCEPTS

LEVEL 6 – RESONANCE

## Agenda



1. What is coaching?
2. What are the benefits of coaching?
3. Why don't most organizations have a culture of coaching?
4. How to create a coaching culture that inspires growth?
5. Developing and executing a coaching methodology.
6. Tips and ideas.

**DAUBERT**  
CHEMICAL EQUIPMENT, INC.



SALES CONCEPTS

Notes:

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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## What is coaching, and why is it important?

LEVEL 6 – RESONANCE

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### What is coaching?

Effective coaching is about asking questions.

A true leader helps people discover and set meaningful goals, identify specific behaviors or steps for meeting them, and identify behaviors and decisions that impede them.

A true leader and coach helps people clarify milestones or measures of success and holds people accountable.

Effective coaching is about accomplishing objectives.

    SALES CONCEPTS

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LEVEL 6 – RESONANCE

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*“Leadership is aimed not so much at directing people as it is at changing people.*

*If we would be the kind of leaders, we ought to be, we must make it our aim to develop people rather than dictate plans.*

*You can direct people to do what you want, but if they don't change in their heart, you have not led them.”*

John Piper

    SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

## LEVEL 6 – RESONANCE

### Benefits of coaching



1. Improved performance
2. Accountability
3. Accelerated learning
4. Builds leadership skills.
5. Creates a culture of teamwork.
6. Camaraderie.
7. Creates trust and loyalty.
8. Creates buy-in and engagement.
9. Removes ambiguity – answers questions.
10. Higher morale.



SALES CONCEPTS

## LEVEL 6 – RESONANCE

### Creating a Cycle of Growth

1. Define success. Establish the mission.
2. Establish and communicate priorities for each group.
3. Set goals and develop KPIs
4. Execution of activities.
5. Coaching assessment and reflection.



SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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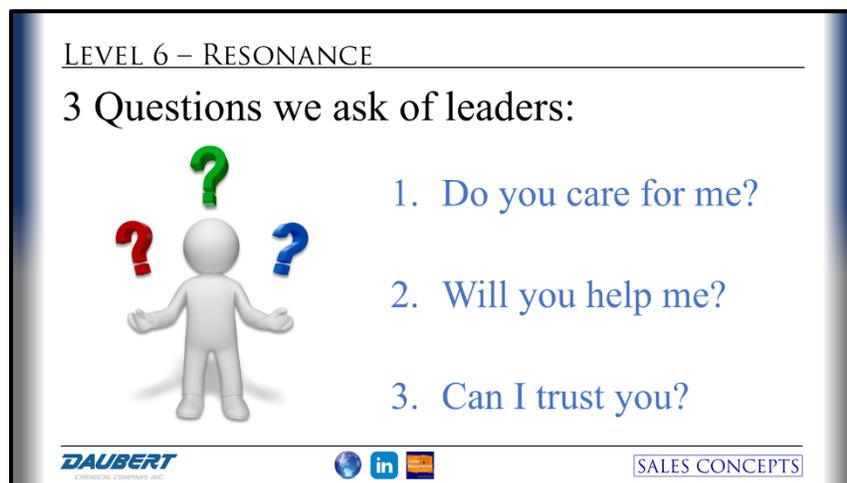
We must answer the following question for coaching to be effective.



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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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**LEVEL 6 – RESONANCE**

## Why don't we coach?



1. Perceived lack of time.
2. Unorganized leadership.
3. Don't know where to start.
4. Established culture.
5. Lack of skill.
6. Not perceived as worth it.
7. Lack of expectations.
8. Employees don't want to be coached.

**DAUBERT**  
CHEMICAL COMPANY, INC.



SALES CONCEPTS

**LEVEL 6 – RESONANCE**

## How to create a coaching culture.



1. Be consistent.
2. Be proactive.
3. Sell the value.
4. Share what you know.
5. Ask open-ended questions.
6. Solicit feedback
7. Listen.
8. Share and live your values.
9. Invest in your people.
10. Keep your promises.

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SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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## LEVEL 6 – RESONANCE

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### The Goal of Coaching – Create *Buy-in*

For coaching to work you must create buy-in in the mind of the person being coached.

The purpose of coaching is to unlock people's potential to maximize their own performance. It is helping them to learn rather than teaching or telling them.



SALES CONCEPTS

## LEVEL 6 – RESONANCE

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### How to react...



- *Listen*
- *Empathize*
- *Ask*



SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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LEVEL 6 – RESONANCE

3 Questions we ask of leaders:



1. Do you care for me?
2. Will you help me?
3. Can I trust you?

DAUBERT   SALES CONCEPTS

## 1. Can I trust you?

- Can I trust you to live what you teach?
- Can I trust you to be consistent?
- Can I trust you to be accountable?
- Can I trust you enough to be vulnerable to you?
- Can I trust you to **KEEP YOUR PROMISES?**

## 2. Will you help me?

- Are you competent?
- Can you help me do the right thing?
- Can you help me do the right thing well?
- Will you let me make mistakes?
- Can you help me succeed?



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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LEVEL 6 – RESONANCE

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## Creating A Culture of Successful Hiring



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SALES CONCEPTS

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# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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## LEVEL 6 – RESONANCE

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One of the costliest mistakes managers make...

Failing to properly  
vet key hires.



SALES CONCEPTS

## LEVEL 6 – RESONANCE

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### Executing a Consistent Hiring Methodology

One of the most important functions performed by managers is people selection. Locating, interviewing, selecting, and hiring the right people are ongoing and necessary jobs. When successful in these endeavors, managers build prosperous teams.



SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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## LEVEL 6 – RESONANCE

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### What research says about building a profile for success. . .

- Traits for success
- Questions to uncover the traits for success



SALES CONCEPTS

## LEVEL 6 – RESONANCE

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### Positive Attitude and Work Ethic

Motivated by accomplishment. Desire to be the best. Refusing to settle for being mediocre.

### Curiosity

Learn from experiences. Ask questions. A hunger for knowledge, solving problems, and discovering opportunities with customers.

### Persistence and the Ability to Overcome Resistance

Accepting challenges with resolve and enthusiasm.

### High and Clear Expectations for Growth

Have the discipline to set, pursue, and achieve goals.

### Priority Management, Organization, and Responsiveness

Managing a territory and customer demand. Setting and pursuing the most profitable priorities. Meet deadlines and exceed expectations.



SALES CONCEPTS

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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## Positive Attitude and Work Ethic

Motivated by accomplishment. Desire to be the best. Unwilling to settle for being mediocre.

## Curiosity

Learn from experiences. Desire and ability to ask questions. A hunger for knowledge, solving problems, and discovering opportunities with customers.

## Persistence and the Ability to Overcome Resistance

Accepting of challenges with resolve and enthusiasm.

## High and Clear Expectations for Growth

Disciplined to set, pursue, and achieve goals.

## Priority Management, Organization, and Responsiveness

Managing a territory and customer demand. Setting and pursuing the most profitable priorities. Meet deadlines and exceed expectations.

**Exercise: Create 5 questions for each of the following categories.**

## Positive Attitude and Work Ethic

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Curiosity

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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Exercise (Continued) Create 5 questions for each of the following categories.

Persistence and the Ability to Overcome Resistance

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

High and Clear Expectations for Growth

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Priority Management, Organization, and Responsiveness

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



# LEADERSHIP FOR DAUBERT CHEMICAL COMPANY – LEVEL 6 RESONANCE

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You need a hiring method to avoid hiring mistakes.

How the 18-step method works:

1. Have a thorough understanding of the job description.
2. Create a wants and musts list.
3. Establish a selection team of three people.
4. Select a sponsor.
5. The sponsor contacts the candidate.
6. The sponsor asks knock-out questions.
7. The sponsor advises the candidate on the decision to move forward or not.
8. If the decision to hire the candidate is no, advise in writing or by e-mail.
9. If yes, request the candidate to submit a resume and complete the application form with reasons the candidate finds the job appealing.
10. If the candidate fails to respond promptly, then NO. Advise the candidate in writing or by e-mail.
11. The Sponsor checks references.
12. If the decision to hire the candidate is no, advise the candidate in writing.
13. If the decision to move forward with the candidate is yes, then share the hiring plan with the candidate. Explain how the interview schedule and candidate scorecard work.
14. Send the candidate the hiring plan and request the candidate to make all arrangements to set up the other interviews.
15. Then each member of the selection committee interviews the candidate.
16. Each manager completes a scorecard for the candidate.
17. If one member of the committee says no, the answer is no.
18. Advise the candidate in writing as to the decision.

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