Do You Really Know Your Customer?

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Panelists:

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Alan Wallner (00:15):

I am Alan Wallner with Conscious Branding and I want to welcome you to Thrive!cast, a series focused on you, your business and your success. And with each episode, we focus on a topic to spark new thoughts, even generate ideas and push the boundaries of what we know is familiar. And by doing that, hopefully we can even frame up a new mindset to ignite your business forward and inspire action, because that's what keeps it thriving. That's what keeps it going. To get us started today, I have one question for our guests and that is basically our title. Do you really know your customer? Why don't you go ahead and put that in the chat and I'll come back to that in a second, but when I'm out there and networking and talking to prospects, I ask people this question, and many business owners are very general about who their target audience, their customer or their client is.

(01:12): And they say anyone who owns a home or everybody who likes dogs or someone who rides motorcycles, or I even get sometimes engineers. So you get some pretty vague answers. And today to get our businesses to be successful, this type of understanding of our target audience is too general. And to be successful, we needed to go much deeper in our understanding of our outfits. And we're going to get into what that means in a minute here. But first I want to introduce you to our panelists today, we have Dave Priddy. He's the president and founder of DK Sales Consulting. Dave has been leading coaching and training sales organizations for more than 20 years. He has a passion to maximize people's talents and their potential. Dave teaches his clients to understand why customers make decisions in less than 90 seconds. So welcome, Dave, good to have you here today would be here.

(02:10): We have Scott Plum, he's a professor at the Minnesota Sales Institute. Scott is also known as Professor Plum and he hosts the podcast, "What salespeople need to know about selling," and he co-hosts the weekly podcast called "Get in the door podcast." Scott also has a second book coming out this year and it's titled Doing it for Real: Is Your Commitment Greater than your Consequences?" So, Scott, that sounds like an interesting book. It's great to have you here today. And then we have Ben Theis. He's the president of Skol Marketing and Ben works with small businesses and nonprofits to get found online. So not an easy task. We always appreciate Ben. Ben has worked for Google and leverages his expertise to help companies be seen through search engine optimization, social media and search engine marketing.

(03:08): Ben brings a methodology focused on target audience behaviors and also an understanding of how to motivate people to take action. So, Ben, thank you for being here today. I had asked everyone earlier do you really know your customer? I was curious what people's answers were in the chat and it looks like we've got a range of answers like, I, I think I do or I recently decided to evaluate that a bit. And then we have someone who used the title to describe who their target is; personal growth behavior, change practitioners. That helps to get that narrowed down a little bit. But really knowing your customer will make you attract more customers, especially in a business climate like this.

What Makes a Successful Business Relationship?

Alan Wallner (03:57):

In any business climate. And this is why we're talking about how you can connect with your customers and your biggest fans at a deeper level. It's critical to your business. It's actually a foundational component. So how to create these relationships that lasts a lifetime, move people to action and allow you to lead your business with growth. That's all key and it's all tied together. So we're going to get things started off at a fun level here at a basic level, in terms of our customers. Aren't we really talking about relationships and you know, the basics of relationships, if so, having a solid understanding of what makes a successful relation successful and healthy relationship is essential. So how would you guys describe what makes a healthy relationship with our clients, customers and prospects? Ben, I'm going to have you start it out.

Ben Theis (04:58):

I love how we start this out and we start talking about relationships, because if someone's a current client, if someone's a prospective client, if someone's a referral partner or a speaking partner, like this, they're all relationships. I love that we started out with that. My biggest word that we try to start every relationship with and everything is going to be trust. Building trust with that relationship, if that's here specifically a potential client or a current client, so that they know that you have their best interests at heart. I feel like every salesperson always says, I put myself in your shoes and things like that, but especially in today's world where we've seen a lot of fake, I think people are very smart, both consumers and clients and business partners, and they see through nonauthenticity.

(05:54): And so I think that building trust with them, but being authentic with it, we don't have to be perfect. We're not expecting that, but I think it starts with trust and knowing that, yes, I feel like COVID has even brought that up even more to the forefront that we need to rely on these relationships even more and clients need to know that they can trust us to be there, to help if that's payment programs, if that's deferring payments, if that's discounts, I just mean some of those things where they can, they know that they can come to us. And I think at the essence of what a business relationship is, no matter who it's with, it's going to start with trust.

Alan Wallner (06:39):

I agree, a good way to build trust is through that authenticity. And it's so important because people can tell if you are not being authentic. I know it's a little different through communications such as Zoom and things like that, but people can pick up on it. If you're a little uneasy, I don't know if it's inflections in your voice or maybe there's some body language it still comes through, but being authentic is key. I agree with you on that. Scott, how about you, I'd like you to add onto this.

Scott Plum (07:25):

I agree with Ben and I'll add on to that, that we want to create a safe environment with our prospects to exchange information and opinions. And in order to do that, we need to ask questions that are relevant to what a prospect's goals are, what they want to accomplish. And when we ask questions and we learn about their values and their beliefs, it makes it easier for us to have a relevant conversation about what's most important to the prospect. And one thing that salespeople really struggle with when they're working with a prospect is a high need for approval, high need to be liked. And they just have been taught that people like to do business with people that are like them, that they like. And I don't disagree with that. I think in addition to that, people like to do business with people that they want to be similar to. So if a person has greater confidence, they like that person because they want to have greater confidence. But I think a lot of salespeople really struggle with having being liked as a destination and not working to earn their respect. And when you earn the respect sometimes need to ask questions to get prospects upset and people buy emotionally.

(08:19): They justify it intellectually. So if we ask questions that are relevant, what's most important to a prospect, but the goals are that they want to achieve or asking questions and a prospect's pushing back or getting upset. We're on the right path because people need to get emotionally involved in order to make a change. And that change then is going to be supporting what the goals are that they have. So our relationship is important, creating a safe environment is the main ingredient. And I always tell salespeople, the main ingredient of building trust rapport is to just listen. They don't need to start doing anything. They just need to stop talking. And when you stop talking and start listening, you'll be amazed at what a prospect will tell you. And they'll tell you what's most important to them if you're asking the most relevant questions and you have a goal and a process of identifying what information you want to learn from that prospect.

Alan Wallner (09:11):

I like that because not only are you listening to them and making them feel good about themselves, you're actually listening to them. You're building the trust to when Ben was talking about earlier, but you're also creating self-worth for that individual. And everybody can always use a little more self-worth feeling.

Scott Plum:

We need to pay attention to words because words have different meanings and different definitions to people. And right now there's a lot of uncertainty in the marketplace and people are using words that are general and they're wishy washy, and they're not really giving us a confirmation of which direction to go. So if we just go by that, what do you mean? Can you give me an example? And now you're going to be able to get the context of what the definition of that word is based on their world tool. Yeah. Thanks.

Alan Wallner:

Cause something's can be pretty general.

Scott Plum:

Yeah, it can be. I've really slowed down. Well, when you say this slow down, what does that mean?

Alan Wallner:

Dave, I'd like to hear your perspective.

Dave Priddy (10:20):

Trust was the first thing that jumped out as both Ben and Scott talked about. And a lot of the things that Scott talked about, my second thing that I really focused on was mutual respect. Having that respect and making sure that that understanding goes both ways. I think you covered a lot of the things and when listening, and I know Scott, we've talked about this before, but it's not just listening. It's active listening. It's not listening to respond. It's listening to understand. Because that's the thing that I see. I've led sales teams for a long time and there's an awful lot of people that they're listening only so that they can pounce on the next piece of information. So it's really important there, the last thing is, is that ability to communicate.

(11:02): And that's especially important when you disagree; to be able to still have that communication. I mean, that's one of the issues that we face in the world in general, but it's having that communication so that you can listen and to Scott's point, you almost get to the point where it's a little uncomfortable for them and a little uncomfortable for you, but you can still have that mutual respect to see the different perspectives and finding, okay, what's the pain point? What is the problem that you can help solve? And it may not be you, it's also understanding that creating that relationship sometimes, in the long run, it may be, Hey, I'm not the right person to help you and then lead them to that right person.

Alan Wallner (11:45):

Now you're tapping into the healthy boundaries a little bit. We're always working to open doors, to get business, but what if someone starts taking advantage of you, you need to create some healthy boundaries for yourself. So that you're not being taken advantage of businesswise or the relationship doesn't get abusive to your business.

Ben Theis (12:13):

One thing I'd like to add too, is going off of what Scott said, is even the words can mean different things, but I'd also even take that a step further that even communication, isn't just words it's the actions; if we say we're going to do something then follow through with it, the way that our communication style may has changed or the aspects of it, like with Zoom or phone calls or things like that. And so, yes, the words are important, but going back to what Dave was saying, is bringing all that together and then putting it into action, understanding that the way that we're perceived as yes it's trust and it goes off of those words, I think you would start to understand or start to perceive trust with words, and then you actually deliver on it and actually build that with your actions

Dave Priddy (12:59):

Great point, Ben. That was actually some of it. But the other piece of that is also identifying who you want to work with. It's sometimes with some of the changes, with some of the struggles right now, it's sometimes like, Oh, I got to get a customer. I've got to get a customer. Well, sometimes that may be the worst. The worst outcome is you get the wrong customer and then it's not that good fit, you're not going to be able to do as much to drive their business forward. And then they're not going to be very pleased with what you're doing. So it's finding that right fit and sometimes getting them to the right person. Scott and I have talked about this, but I've referred people to Scott and it's finding the right fit and in the long run that will do, everyone's busy, help everyone raise their game and raise the possibilities.

Make it About the Customer

Alan Wallner (13:47):

That's a very good point to make. You know, often in these relationships we give people what we think they want and in the case of our customers and clients, the same is true. So in a sense, we're making the relationship about us or about our brands. Shouldn't we be flipping this and putting ourselves in the other person's shoes and asking from their perspective, what can you do for me and making it about the customer? And I'm wondering what your thoughts are on that and why this perspective might be really critical to attracting new customers and clients and retaining the ones you have. I will start off with Scott.

Scott Plum (14:40):

I think one thing that we need to keep in mind when we're working with a new prospect; some of the symptoms that they share with us is to be able to identify what their goal is, listen to the symptoms. And not to be assumptive that they want to change. We need to find out what their motivation is to change. And when we start talking about what is the outcome of a better life, or what is the outcome or the results of improving a situation, what would that do for you? Or what would that do for your business? Now we're really focusing on the motivation for somebody to move emotionally and people are going to buy for their reasons, not ours, as much as we think that that's true. It's not the case. And sometimes when the prospect brings us the solution that they think they need it, it could be creating a bigger problem because we didn't do a good enough job of qualifying the solution before they decided to buy it. We think it's a slam dunk and we ended up creating a bigger problem because there's certain things that we didn't know about before we prescribe a solution that creates a bigger problem.

(15:44): So we really need to be able to focus on asking the right questions. One of the things that upsets and really turns off prospects is an assumptive salespeople, that salespeople assuming that everybody has a problem. Everybody has the same problem. Everybody wants to change their problem. And everybody wants to buy from me and salespeople come strutting into the office going here I am to save the day. I've got a problem solver to all of your problems when salespeople are being assumptive and they should be more focused on being a problem finder than a problem solver, find the problem, find out the motivation to change. What would that do for the prospect of the individual and then continuously to focus on that mutual goal to work together, to get there. But don't be assumptive. Don't assume that the prospect knows what they want. Ask questions and learn more about what their motivation is.

Alan Wallner (16:38):

And from the marketing perspective, we don't make ourselves the hero. The client is the hero. Your customer should be the hero and you're the guide to help them get there.

Scott Plum (16:51):

Exactly. If I could just add one more thing is when we're having a sense of, I need to educate my prospects. Don't. Every salesperson seems to have that mentality. And here's another thing to keep in mind, as we want to educate, to influence, not educate, to teach as a prospect, educate to influence, not educate to teach. When they become a customer and a client, then we work on the fulfillment of sharing our knowledge with them, giving them our expertise, not withholding anything, because we really want them to make a commitment to working with us. If we get into a situation where we're offering a lot of advice, we're not getting paid for it, that's called unpaid consulting. And then are we really earning the respect of the prospect to buy from us? Not really because we continue to give our information away for free. I think we should be paid for information and our knowledge. That's how we earn a living.

Alan Wallner (17:40):

So it's really creating that healthy dialogue and asking the right questions.

Dave Priddy (17:52):

There's going to be a lot of commonality, but everybody's focus is everybody's favorite radio station is within. What's in it for me. And to a certain extent, I almost look at that as like, okay, we need to do that. What's in it for me, but from their perspective, instead of our perspective, and it's identifying that pain point, its identity. There was a book that came out a number of years ago, the "Challenger Sales Model." And it's identifying what is the problem there, but it's not necessarily telling, okay, here's your problem. Let me fix it. It's asking questions. It's saying okay here and saying, okay, here's what I see from my view. What do you see? And Scott you hit the nail on the head is that they need to see what they want to do.

(18:37): And sometimes you may identify what you can perceive as a problem that you could really fix well, but that may not be the issue. It may be building on strengths; Hey, you're doing really well here. Maybe focus on that. Because if we can accelerate the strength that may take something that they're really good at and making it world-class or make them if they're world-class make them number one in the world. And it's finding out what it comes back against. Scott said it really well that what motivates them, what is going to motivate them? Because sometimes we don't think anything's broken, but we just want to improve on things. Okay. So let's find on what you feel can be improved and how do we measure that? Because that's the other piece is identifying what they want to get to.

(19:24): So I'm doing a million dollars. I want to do 10 million. Do you want to do that in a month or you're going to do that in five years? It's making them realistic as well. It's also understanding what are the goals? What are you willing to do? And how are you willing to do it? It's got to be within them. It's helping them figure that out. And then, back to am I the right person that can help with that? So it's got to be there. What I said with them, what's in it for them.

Alan Wallner (19:56):

What they're willing to do, I think was a key piece to it as well. There is a degree of commitment on both sides of the relationship and oftentimes the commitment seems more on the business side rather than the customer side, but there is a commitment to both sides.

Ben Theis (20:17):

David did a fantastic job and even some of the stuff that we talked about in the previous question, like listening, really talk about the right questions, but then doing the next step is then actively listening for that. And I think this also then goes up another point that we also collectively were talking about is getting us in front of the right customers to make sure that it's right for them; be respectful, obviously I feel like we sometimes always look it like is this a waste of our time?

(20:49): Is this a waste of the prospect's time, but also be respectful. Is it a waste of their time? If we're not the right fit, that's okay. Not everybody's going to be the right fit for everyone. And so I think that that's just an important thing to do. And then my last thing to add to this of all the good points that Dave and Scott brought up is off of the assumption thing, checking our ego at the door. And my biggest thing that I've always tried to tell people when it comes to sales is I feel like sometimes in my industry, and I know other industries out there too, that there's this assumption that the customer isn't smart enough to understand that they need us, let's get that away.

(21:29): We may need to educate them so they can make an educated decision, but don't assume that they're not smart enough to know that or to begin to make those educated decisions, really look at it, that they were probably going to have other people they could go with, but why are they going to go with you? And just making sure we don't lose sight of that; customers are smart. They can make smart decisions. And we need to make sure that we remember that while checking our ego at the door and remembering how throughout the process.

Alan Wallner (21:59):

I really liked that you brought that up, Ben, about the customer isn't smart enough because if you really take a look at it, it's not that a customer isn't smart enough. It's just that we don't know how to frame up what we're selling and what we're doing to their vocabulary and their world and their situation. That's really tough.

Ben Theis (22:18):

When I see that approach from a sales person or whatever, you know what I mean? Because like you said, they may not be able to articulate it. They may not be able to, it doesn't mean that they don't know what they want or even making it a part of your industry and your product or what it does.

Understanding the Customer's Personality

Alan Wallner (22:33):

And I even hear internal culture saying, man, the customers just don't get it. And I think this is a perfect segue to our next question, which is we're going to go beyond establishing the relationship to another level of really getting to know your customer and that's understanding their personality. I've learned over the years that is the key to everything. It's almost like the secret code. And there's a great book that I had picked up a number of years ago called "The Platinum Rule." And there's a lot of other assessment types of things that you can do out there. But the Platinum Rule was really nice because it helped identify different personality types so that you can better align yourself and your communication with others and still be authentic to who you are. It's not manipulating people, but it's like what you were saying earlier.

(23:24): It's not that the customer is not smart enough. I don't know how to communicate to them the way they like to be communicated to. And so by understanding that, you can really open up a whole different world of communication with your clients and to better identify and define what their needs are and how you can help them. And so I am wondering what types of things do you use? What methodologies or tools do you use to help better identify and define your customer so that you can have that effective and impactful communication with them?

Dave Priddy (24:08):

"The Platinum Rule," his book came out in '98, 1996. And the first time I heard that phrase was in the late eighties when I was with Johnson and Johnson and it was really trying to focus on what a lot of the stuff we've already talked about for the first couple of questions. Dale Carnegie talks how to win friends and influence people. And a lot of times that has a lot to do with listening and active listening. But the system that I use is called BANK and it's an acronym and it's very similar to other psychological profiles. All of them are based on Hippocrates, four temperaments from two-and-a-half millennia ago. At the beginning, Alan, you talked about that 90 seconds and really helping to understand what's important to the people that you're talking to much more quickly.

(25:00): And that's what I like about this system. And it really provides an opportunity to say, okay, what's important to you so that I can talk to you the way you want to be. I can really follow that Platinum Rule and it's helped me a lot. It's finding ways to communicate to the best of my ability with the way that person communicates and what do they want to hear? It's not excluding anything. It's not saying, Oh, I'm going to hide this, but it's focusing and delivering a message so that they want to hear it. You'll notice that the back of my after my name, I've got "NAKB," so that's my code. And I share that with people to say, Hey, here's who I am. Here's how you can communicate with me.

(25:46): Here's what's most important to me because I would much rather go in and talk to a salesperson and have them present the information that's most important to me so that I can make a decision. It may be, yes, it may be no, but it's going to accelerate that because that's the way I see the biggest challenge. I've done every single psychological profile. You can imagine I've done discs two or three times. I've done. Myers-Briggs, I've done Discovery, Insights. Anyone in corporate America has done these; every time you get someone new in HR training, you get to try it again. They all bring value. I see that they all have helped me better understand people. I've worked with people who've worked for me and my customer. So I see a lot of value in them. And that's the system that I use.

Alan Wallner (26:33):

It's all about people. So we have to really take a look at that. And I really like how it's understanding how they want to be treated; sort of the personality types. It's more based on their values. You can really connect at a deeper level with them. It's not surface, it's more authentic. And you can have a better conversation with people. Ben, I'd like to hear you chime in on this and give me your thoughts because you bring a little bit of the marketing perspective here as well.

Ben Theis (27:06):

Specifically internally and externally, we've used DiSC as well as "The Five Love Languages" to understand a little bit. When I look at all of the different ones that Dave brought up, we've all probably done a version of them and they all come down to, they're really trying to get at the same thing, which is how do we deliver the message that we have, communicated to that individual? Because, at the end of the day, the delivery system is usually more or less what we're talking about. Asking questions obviously gives me more and more experience with just being cognizant.

(27:54): If you've never done BANK or DiSC or Five Love Languages or Myers-Brigg, you want to do those because I think it's important. And the little things that you can pick up on and a good salesperson, a good business owner, even just a good person, a lot of times we'll be implementing the Platinum Rule and picking up on these things. And the trickier part isn't really necessarily buying into them. It's being able to get good enough or at least to a level where you can see what that is. Because, like Dave makes it easy here when he says he's NAKB, but a lot of us and a lot of people won't necessarily do that. But if Dave and I are talking most likely you're going to be able to pick up on those things. And I think one of the things to also know too, is the times that we're in, is knowing that sometimes just their different personalities or these different DiSC and Love Languages persons can change with the circumstances, meaning that we're in different times with COVID.

(28:47): So understanding that you may have been talking to somebody or apply it a certain way, but you have to be cognizant of not only there's a particular DiSC or BANK, but also look at what's going around them and around the world, because that's also going to alter what they're going to be, how they're going to receive things. We've done a whole presentation on the different psychology of marketing within COVID. And it really just brings back to this, that you could again be marketing at a "D," but now that person may not be acting like a "D" because of external circumstances. So that's the one thing that I would remind people is look at some of those external circumstances when you're analyzing some of this.

Alan Wallner (29:34):

You bring up a very important point because prior to COVID, you may have been talking with somebody at a certain level and a certain understanding. And if you go and charge in now and continue that degree of conversation at that level, it's going to crash. You need to take a few steps back and almost get to know people again a little bit, because everyone's emotional levels are all over the board right now. And you can't just assume people are all feeling the same way.

Ben Theis:

Look at yourself too. You may have changed. So you have to know that as well.

Alan Wallner:

And in terms of the marketing side of things, that's what your brand is about too. It's a perception that people have of you based on how you make them feel. So imagine going into a conversation, assuming when we even go back to what Scott said earlier, assuming all this stuff about an individual and here you're just missing everything left and right. Imagine what impression that's going to leave on your brand. So thank you for bringing this up. It's just always being cognizant of what's going on around you and acting accordingly.

Scott Plum (30:44):

I've got a couple of points. And one point is addressed today with the BANK system and asking people to fill out an online survey as to what is our personality style. And I think some people may be guarded on really sharing that because it's almost a key of being manipulated. And if people feel like their guard is down and the decision-making process is disclosed and they feel vulnerable, they may feel manipulated by the salesperson taking advantage of them. And I'm curious how you deal with that, Dave, if that is a perception of the prospect,

Dave Priddy (31:22):

I think that that part of that is being genuine. I actually thought about that when I was first looking at BANK, and I've had people ask me questions along those lines and it's more creating that trust. That's why I share what I have to say upfront. So here's who I am. I'm a nurturer action and this is what's important to me. So it's creating that trust fairly quickly. And to be honest, a lot of it has to do with, it's almost a game, it's like, Hey, because most people are, think about how many times you've, if someone has done a lot of DiSC, they come up and say, Hey, I'm this, if they've done StrengthFinders, they talk about their first five strengths. There is a danger of being manipulative, but you only get away with that once.

Scott Plum (32:14):

That makes sense. I think that's an important point to make, and it is communication style, personal style, a behavioral style, a preference. And we have our preferences and I think we need to know what our preferences are and we need to concentrate on our strengths and manage our weaknesses. Because we can't control all scenarios. We may be a person that likes to read something, but if we're in an event and there's nothing to read, we have to rely auditorily. So we need to concentrate on listening more, even though it might not be a strength, we want to read it, or maybe we're more statics or we're basing more of our actions on how we feel and the connection with another person. So I think we need to look at, are we visual oratorio, kinesthetic?

(32:59): Are we DiSC? Are we BANK? Or what is our preference? And to be able to concentrate on that, but also know what our weaknesses are. And then when we get into a situation where we may feel like we're going to be taking a few punches or getting beat up in the situation, I think we need to know what our goal is when we're representing our clients too. And I work with real estate agents on doing continuing education for real estate agents. I just got a new class course approved on how to represent your client against the bully because there's plenty of those out there that are just treating tours in a way that's not respectful. And in some cases tempt somebody into doing something that's unethical or illegal or not in the best interest of their client. So that the salesperson, the Realtor needs to say when somebody says you're such an idiot, I can't believe that you got a license and the real estate agent needs to say, yeah, you're probably right. I'm surprised that I passed the test too.

(33:57): I just want to represent my client. So the agent's taken a few bullets and taken a few punches, but they're representing their client. And what's the goal is to get what the client wants. And you take a few punches in the meantime. So knowing what we are preferred and then being able to, to sustain the variations that we can't control, I think is really important when it comes to an assessment that's probably a little bit more broader than the question started off as.

BANK Personality Profiling System

Alan Wallner (34:27):

I like that because sometimes you do have to take one for the team. It's not all about protecting your ego. Sometimes you need to queue it up. So you're protecting your client or your prospect. Exactly. That's great. And I want to go back to the BANK assessment tool; because usually part of working and having a trusted dialogue with an individual is to make that really good, solid, personal connection. So you're going to be out there doing research on their business or something with their personal life. So hey, they like dogs. Okay. So I'm going to use that as my wedge to make a connection, to have a good conversation where I can earn the right to ask a business question. So does BANK allow you to have a start forging that type of relationship so that you can earn the right to ask business questions?

Dave Priddy (35:28):

The whole system was designed around sales and it's actually morphed into more communication in general. I'm a licensed trainer for them. We've now shifted. We've got a virtual coaching because of it. It talks about what are some of the triggers? What's important to someone for a nurture action? It's important for relationships. It's important to the pop and the sizzle. Now my knowledge and blueprint are fairly high as well, but you've got someone who's knowledge. Ben had made a reference. One of the other profiles is knowledge. They want a lot of information. They want to look at the clinical studies. So there's studies to be done. And so it's really identifying what information to provide. It's not holding back anything, but if for some, I don't necessarily want a lot of studies, but I want to know that they're there.

(36:20): So if I have a question, I can then ask that. But what I think is even more important that talks about the trip wires. It talks about, okay, you do this and you've just stepped on an IED and you're not going to be able to recreate that relationship for years to come. So sometimes it's even more important to say, okay, what if, as a nurturer, if someone comes to me and talks about, Oh, hey man, he's like Scott talked about that realtor, if I know that someone has cheated someone or tried to shade the truth, that building that trust, I'm never going to call them. I mean, they're going to have to do so many things to draw themselves out of that. And that might not be as important to other people, that may not be the best example, but if you do things, a blueprint in general is what you want; to be on time and you follow through.

(37:12): So it's the other thing is that the third key, the third code is usually your stress code. When I get under stress, I'm going under a lot of pressure, provide me with 10,000 pieces of information and I'm going to have a problem of paralysis through analysis. So it helps to phrase that to what I like about it. And the other thing I like about it is that it's so simple. I mean, literally I hand people a set of cards, and just boom, within 90 seconds, they said how they want me to communicate to them. And I always emphasize the other danger of any of these profiles is, I know your code. I know you. And I don't have to think anymore. That's still the structure. That's still where you're going. It gives you a major leap forward, but you cannot make assumptions. I know three or four other NAKBs. We're still very different in a lot of ways. So it's very important to not assume that you know everything about that person, just because you've got their DiSC profile or their MBTI or their BANK code.

Alan Wallner (38:14):

These are all tools. You can't really get complacent about it. Ben, you brought up the Five Love Languages. I'm glad you brought that up. It's a little unorthodox for business. It's more about relationships, one on one with couples and significant others. But I think that such a key role in business as well, because if you understand how people respond to different emotions and love, I guess basically you can really understand how to build that stronger relationship with them and in an ethical wholesome way. And just understanding the Five Love Languages opens up a whole new world of communication, I believe.

Ben Theis (39:04):

Oh yes, 100 percent. I always say especially with small business owners or not even having to be small business owners, but, a lot of times work, especially, I'm assuming a lot of people listening and doing that are more connected than potentially maybe the average. So that personal love or in that business level really starts to meld together. So there's a lot of similarities or things that can be a transfer.

Organizing Information about Each Customer

Alan Wallner (39:27):

All relationships get better with a little love. Now we've talked about building relationships and collecting all this information about people and who's our ideal customer and then even profiling so that we can get a little more focused. Having all this information about your customer, who your ideal customer is, I'm going to put on there can be overwhelming and tough to keep organized. So how do you refine and organize all this information? Cause you're probably going to even have subsections of your different target audience groups so that you can hone in messaging when you're doing your marketing and sales to specific issues or problems they may be having. So how do you organize all this to be more effective? When you're out there communicating, do you have a complex cheat sheets or how do you do this?

Ben Theis (40:34):

I think it's important to remember to find what works best for you. That may seem simple, but I remember when I was first getting into business, you have all these people telling you, well, this is the way you have to do it. You have to follow these systems and some of them just didn't work for me. It's important to realize what the basis of what they're trying to tell you and then make sure you can implement it on your own. And so, for instance, for us internally, it's essentially a CRM system or using analytics to make sure that we can identify and then we categorize and then we can keep track of our different relationships with them and communication.

(41:20): But I think overall too, another thing that I would like to bring up with this is throughout having all your different demographics and everything, I think it's always important to prioritize those demographics. And we always talk about this with our clients is you want us to try and stay away from the "coulds." And what I mean by that is I'll work with a client and we get these two main demographics they want to go after, and then they want to change the entire messaging that we brought to them because they could go after this other demographic, they could go after this other person; yes, you could do business with them, but again, make sure you stay focused. I think that that's what a lot of these tools can help you do, or these methodologies, which I feel like Scott will be able to even talk a little bit more and Dave on those. But I think the one thing that I like to just bring to it is that yes, a CRM system. Yes, analytics, some of these other kinds of systems, but at the end of the day, it's making sure that we can keep the communication straight. So we're doing our follow-ups, we're doing that. But at the end of the day, making sure that we're staying focused with the demographics that we've prioritized and not getting stressed, distracted so much with the "coulds."

Alan Wallner:

Because the more focused you are, the better results you're going to have. If you're trying to sell to everyone and jumping around you're not going to be able to have the sales success that you'd like to have, or even marketing, drawing the right people to you.

Scott Plum (42:47):

I totally agree with Ben and he's right on the mark when it comes to the CRM and keeping track of the different demographics. And I think in addition to that, when we have a conversation with a prospect, we need to really understand what is their goal? What is their ideal desired outcome and what would it do? What would they get? I mean, people don't buy a drill, they really want a hole. And when we give them the desired outcome or focus on the desired outcome, then everything that we should do should be in alignment with that goal. In the first conversation that we have with a prospect, we really need to be prepared to seek information, to find out what's important to uncover the decision-making process and to be able to focus all of our conversations on those topics so that we can have a second phone call. Salespeople say to me all the time they're not returning my phone call.

(43:48): They're not returning my message. You know, I've left three messages and have you ever had a chance to talk with them? Yeah. I talk with them once, well, what did you guys talk about? Well I and we don't know, we don't remember. We never prepared for that first phone call and that first attempt to be creating an approach that creates interested in curiosity in the first conversation. So that they're interested in talking with us, they want to return our phone call. They know we have something that they want and concentrate on that. That way, they're going to return our phone call. We're going to continue the conversation. So know the desired outcome; know what they want, focus on that; everything you should do should be in alignment with that. If it doesn't support the goal, it's a distraction. Period. And when you're having idle conversation, it can be like walking into a minefield. So if you're going to say something or ask something, have a goal, focus on the goal. And I think you're going to be able to get to the desired outcome and have that engagement. And then going back to the trust and rapport and respect, you're focused on what is most important.

Alan Wallner (44:52):

The twist of the goal is primarily with your customer in mind. What can you do for me? So it's goals around that rather than your goal of I need to close the sale.

Scott Plum (45:09):

I have people that call me. I don't want to answer the phone. Because that's 45 minutes I'll never get back. I like them, they're friends, but I'm not going to answer the phone. You're calling me during the day and prime time here. I'm not going to talk to you because it's just going to be meaningless. It's going to be a fun conversation, but we're not going to get to a goal or we're not going to really change anything. So we'll do it another time. And if you can shrink it down to a thirty-second message and be concise enough, I'll call you back. But if you can't do that, it really wasn't worth it to be good with; sorry to be so harsh.

Alan Wallner (45:45):

That's good. So I lost track there a little bit, because I was laughing and joking and teasing you. We need Dave and Ben to answer that one as well, too yet, right?

Dave Priddy:

I think Ben started, they both made some great points. The CRM and having those goals and everything, but one of the other things that I always emphasize to every one of my people who are in my sales teams is taking notes, but not only taking notes, but literally as soon as you walk out of the call, write it down. If you were going into your next call, if you were having your next appointment, you were having your next discussion. What is it that you would want to follow up on?

(46:27): What are the extended conversation you want to have? Because you're never going to be that aware. If you wait till the end of the day, you forget things. If you wait to the end of the week and if you don't do it by the end of the month, you're guessing exactly what happened there. So it's having that CRM or the model or whatever it is. But then having that information and also pulling from what both Ben and Scott said, is developing that avatar, figuring out, okay, what is the focus, who is my ideal client? Maybe it's one or two, no more than three. It's got to be this laser focused. If a chiropractor says anybody who has a back, it's like, okay, well then, then everybody has a back and no one is going to call you.

(47:14): It's having that focus and bringing it back to one of the other things, as far as segmentation, that's what I like about some of the psychological profiles, I put people down in my phone. So I put down their codes so that I know if they call boom, I can say, okay. And that reminds me of a lot of the notes that I've taken. Maybe I'm not going to be perfect, but when I'm going in, I've got that preparation. So that I know there's a lot of nurturer actions, so more nurture actions. I can get 80 to 90 percent of the way I want to talk to them on all the time. Now there's going to be some nuances. Based on what are other things that are important to them and things that I've got to know, but that allows me to at least have a jumpstart so that I'm more prepared, even if it's quarter of a surprise call. I know, boom. I know how I want to talk to them. And then back to those triggers and trip wires to avoid some of those trip wires. So I'm not sabotaging the relationship.

ATTENDEE QUESTION: *Would someone's personality, classification or assessment really change during a crisis? Would it be temporary or is this clarity on who they really were all along?*

Alan Wallner (48:17):

Now I'm going to get into the ABQ, another burning question, from our listeners. It says would someone's personality, classification or assessment really change during a crisis? Would it be temporary or is this maybe clarity on who they really were all along? So I think I know Dave, you just finished answering that question, but I think I'm going to start with you because you use the BANK system quite a bit.

Dave Priddy (48:50):

First of all, when I look at the blueprint action, nurturing, knowledge, everybody is made up of all four. Some people are really high in some, some are really high in all of them, but under stress in a lot of times, what I've found is that you go to that third code because it tends to just be the stress code. But it's depending on the situation both what Ben and Scott said that comment based on the situation. There's some people that emphasize more, they pull out more of one aspect with their families and their friends and in business. I'm very high in blueprint because I was in the Navy. I went to the Naval Academy. I spent 17 years with Johnson and Johnson; Johnson, and Johnson is about a blueprint accompany.

(49:35): If you don't act like a blueprint, they've got two words for you. You're fired. So it's a matter of based on the situation you're in, you need to raise your game. To be honest, ideally you're absolutely across the board equal in all four and then just pulling on which one it is based on what the situation is. If I've got to get real technical, I've got to really raise my knowledge. I've got to get into the specifics. When I was presenting clinical studies and trials to physicians, I needed to pull up a lot more on my knowledge. If I was doing more relationships and things like that, it's a much more nurture. Everybody will react differently under different scenarios and different situations.

Alan Wallner (50:18):

But they always tend to go back to their core at the end of the day.

Dave Priddy (50:22):

This is really how you make decisions and nurture action is how I make decisions. You normally present yourself in a similar manner, but it's still important to be ready to handle all four. But to a great extent, I though the value that I see is with all the ones that I've taken, they've been between 80 and 90 percent similar. So that's what validates most of them for me.

Ben Theis (50:50):

The only thing I would just say is, we're always changing. I do think that in most circumstances, stress is usually a temporary type of thing. You may know that there may be a pattern, like for instance, if I'm against stress and if I'm stressed, if that's an internal team working how to potentially react because temporarily I may switch to a different one. I think if we're specifically talking about COVID, that's potentially a different type of situation or a circumstance. You're talking catastrophic life events that happen to people that can definitely change people. We've all probably known people that have gone through things that have been catastrophic that changed them.

(51:35): They may have been this way now they're this. I'd say in normal situations with normal stress, and there's going to be different intricacies for everybody, but I'd say it's more going to be temporary. Dave brought up is if you're going into your second or your third letter in the example, we're going there, but then we're coming back, we're going there and then coming back. But it is important to realize that we may have to be a little bit more cognizant and we may be dealing with some things that may be a little bit more permanent than we're used to. Just because we're going through a catastrophic type of stress event, we're all just doing it all together instead of individually where sometimes that happens.

Scott Plum (52:20):

I'm going to cover three points when it comes to the DiSC assessment; there's two types of results. There's the natural and they're adaptive. So when we're seeing a large variation with our DiSC in certain areas, we're going to encounter a lot of stress because we have to adapt so much between our natural ability to our workability. The second thing that I like to add is when it gets into stressful situations with other people, we need to ask ourselves, what is it that we want? What do we want for the other person? And then what do we want for the relationship? So we need to be able to answer those three questions. And then the last is everything that we do is built on our motivation of self-interest. And there's really three types of self-interest. One is a selfishness that it feels good to do something for another person.

(53:14): It feels good to volunteer at the Dorothy Day Center or go down to Mary's Place. So we feel good because we do something like that. Then there's the self-centeredness where we do that because we want our own edification of it. That can be very selfish, self-centeredness. And then the third one is we do things because we want to avoid feeling bad or feeling guilty. So when somebody comes and asks us for a favor and it could be a very personal favor. We don't want to say no to them because we don't want to take on the consequences of what happens. If what I don't give them is going to end up as a negative result. So I do it so that I don't feel bad. When you think of those three areas of stress, when you start analyzing a little bit more, we start to address an emotion with a little bit more intellection, a little bit more of a philosophical approach.

Closing Remarks

Alan Wallner (54:07):

So wrapping everything up here today. What we found out is it's really important to get to know our customers and our target audience, our client. However, you want to label them at a much more granular level so that we can have the deeper conversations that we need to have. And by having this information, we're also able to differentiate ourselves from our competition. So the better your target audience, the better you can communicate and connect with them. And not only that, and it also gives you a cheat sheet for how to market to them. You know, what types of words to use, what types of phrases to use, how can you help them? But it also gives you insight around what new products or services you could even start adding to your business.

(54:55): So really knowing your customer is one of those foundational elements. That's the key to your success with your business. It's a lot of work, but there's a huge return on your investment for whatever you put into that. And don't just make a list, leverage it and use it. With that being said, I'd like to thank our panelists for sharing their insights and their wisdom here today. And I'd like to thank everyone for attending this Thrive!cast episode. And I hope you've enjoyed the conversation. I know we had some fun here, had some laughs. So it was good for me. And if you have any follow-up questions or questions that we were not able to address due to time limitations, please send them to us at info@consciousbranding.com and we will respond to you. And we'll also be sending you a link to this episode, along with some bonus materials to help keep the momentum moving.

(55:46): Also, if you have any friends, peers you'd like to forward link to and the bonus materials, feel free to do that. We're here to help everyone through this. And that's really what this is all about. If you have any ideas for future topics you'd like to see covered, please let us know again, info@consciousbranding.com. And I look forward to seeing you all back here and remember, you create your world, so believe in your vision and drive it with purpose and above all take action.