

# **The Extended DISC® Coach's Playbook**



## **Individual Assessment**

Section 1:  
Mapping Your Clients  
Goals

Section 2:  
Completing the  
*Extended DISC®*  
Questionnaire

Section 3:  
Preparing for the First  
Coaching Session

Section 4:  
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Styles

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## Introduction

After you meet with your client and decide the *Extended DISC*® Individual Assessment is the appropriate tool to help your client, this Playbook will assist with clear and practical page-by-page instructions for debriefing the *Extended DISC*® Individual Assessment. This material is intended for one-on-one sessions with your client providing an introduction to the assessment and to aid in simplifying delivery of the information effectively and efficiently.

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## **Section 1: Mapping Your Clients Goals**



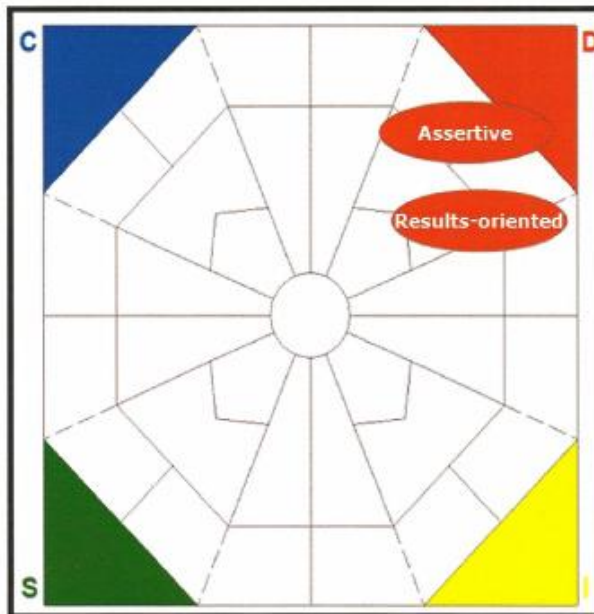


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## Mapping Your Client's Goals

The process for mapping your client's goals is not complicated but it takes some practice. The steps are:

1. Identify the goals (example: increase company's sales by 10%).
2. Break down the goals into specific activities (example: all salespeople need to make 30 calls per day).
3. Identify the behaviors needed to succeed in the activities (example: assertively holding the salespeople accountable for their call goals).
4. Convert the behaviors into a DISC-style and map them onto the *Extended DISC®* Diamond (example: assertive, results-oriented D-style behaviors are needed to hold salespeople accountable).



### Section 1:

### Mapping Your Client's Goals

Keep in mind that not all of your client's goals can be achieved with behavioral modifications. Many of them may require specific skills and/or competencies your client may have to develop. Do not force them on the *Extended DISC®* Diamond.

## Review Your Client's Report

It is very important you review your client's report before the first session. Refer back to your client's goals and other relevant information you have gathered. Make notes on the report to help you prepare. This will also demonstrate to your client you have done your due diligence.

### Section 3:

#### Preparing for the First Coaching Session

**NOTE:** After your client completes the questionnaire you may want to provide them with the *Extended DISC®* Self-Development Guide before they receive their report. This Guide will allow them to begin to understand the DISC model prior to the coaching session.

## Customizing the *Extended DISC®* Individual Assessment

The *Extended DISC®* Individual Assessments can provide lots of information. Be careful not to provide too much information and to overwhelm your client. Clearly understanding your client's coaching needs will help you determine what pages you will, or will not need, to best help your client. While you already made a decision what type of report to provide – and therefore, what Access Code to provide your client – you do not need to use each and every page of the Individual Assessment. More information does not necessarily mean you will be effective. Also, you can always provide more information later as your client progresses.



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### Setting for the Session

Choose an appropriate setting for the coaching session. A quiet, private setting is the most appropriate, not a busy, noisy restaurant or a coffee shop where people can overhear your conversation or where you and your client may get distracted. Bring at least two copies of the report: one clean copy for your client, and one with your notes. Some coaches have found it helpful to bring a third, clean copy for the client to take with him following the session.

**Section 3:**  
**Preparing for  
the First  
Coaching  
Session**

### Additional Resources

Do not forget about the *Extended DISC*® resources available to you. For example, using the *Reading Instructions* can help you prepare and guide you when you do not readily know the answer to a “technical” question. You may want to present the *Reading Instructions* as a way to review the information more effectively. It provides your client with a very helpful resource guide between the coaching sessions. When your client has a question or needs clarification on a particular page of the Individual Assessment, simply refer back to the *Reading Instructions*. Also, do not forget about the VIP Online Resource Center. It provides handouts, exercises, worksheets, and a lot more.

**TIP:** Having no page numbers on the report can help you remove or rearrange pages, ask your *Extended DISC*® representative to turn the page numbers off.

### ***Extended DISC® Profile and Diamond Page***

The Profile and Diamond Page is the most important part of the *Extended DISC®* Individual Assessment. It provides the best overall picture of your client's behavioral style by identifying the relationship among the four DISC-styles. The information is provided in three complementary formats:

- Profiles
- Percentages
- The *Extended DISC®* Diamond

#### **The Profiles**

The Profiles most clearly demonstrate the relations *among all of the four DISC-styles*. It is very important to remember that we cannot look at the styles in isolation. While it is helpful to identify someone as being "I-style", it does not provide the complete picture of someone's style. We need to look at the position of all four styles on the Profiles.

The Profiles are the visual representations of your client's style. They are created by calculations based on your client's responses to the questionnaire. Essentially, his responses have been tabulated from the "most" and "least" responses in the questionnaire into a frequency distribution by each of the DISC behavioral styles. Emphasis is on frequency. There are no right or wrong answers.

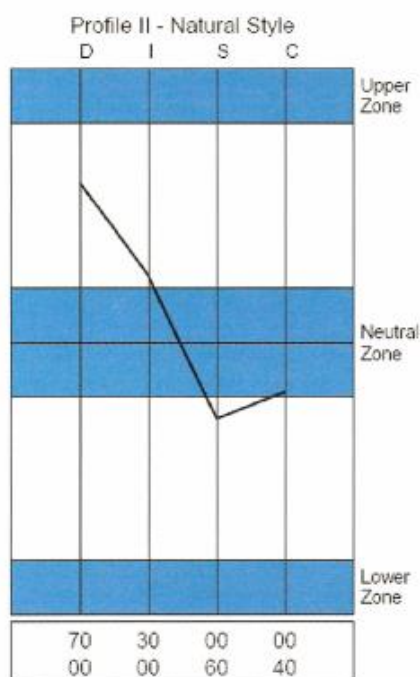
Profile II identifies your client's "natural style". Profile I focuses on the "adjusted style".

#### **Section 5:**

#### **Debriefing Your Client's *Extended DISC®* Individual Assessment**

### Extended DISC® Profile II – Natural Style

Profile II illustrates your client's natural style. It is the most comfortable style for him and requires the least amount of concentration, energy and effort. It is also the behavioral style that others are most likely to observe in your client. In other words, it is your client's "true" or "hard-wired" style. Therefore, it is the more important of the two Profiles. As a general rule, you should place about 90% of your focus on Profile II and only about 10% on Profile I.



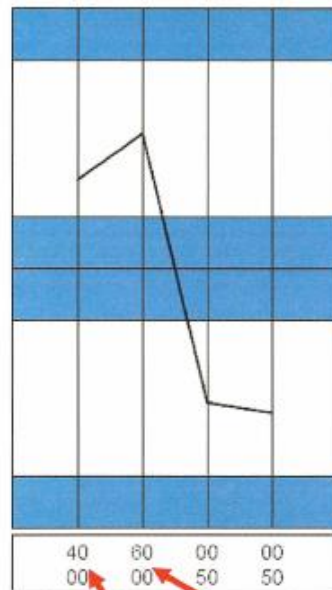
#### Section 5:

#### Explaining Your Client's Extended DISC® Individual Assessment

Profile II illustrates the reaction mode that the person uses to naturally react to different types of stimuli in his environment and is most frequently exhibited outwardly in one's behavior. When interpreting Profile II, one must look at its shape, size and position on the *Extended DISC®* reference framework.

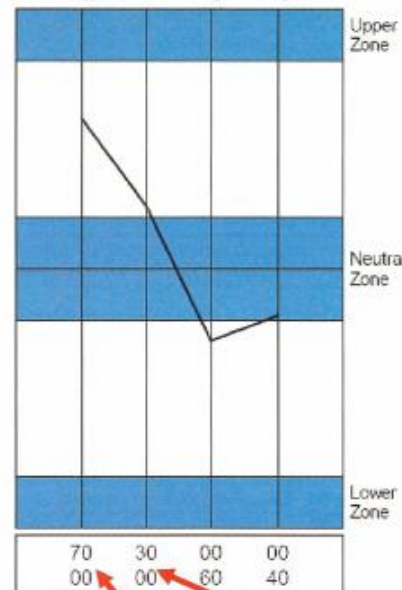
The Percentages can be very helpful in further interpreting Profile I, Perceived Need to adjust. In the example below, the person adjusts from being 70% D-style and 30% I-style to 60% I-style and 40% D-style.

Profile I - Perceived Need to Adjust  
D I S C



**Profile I:** 40% I-style; 60% D-style

Profile II - Natural Style  
D I S C



**Profile II:** 70% D-style; 30% I-style

**Note:** The Percentages do not refer to a specific point on the individual axis of the DISC Profiles. They refer to the relationship of DISC-styles above and below the Middle Line. Both Upper and Lower Percentages always add to 100%. Consequently if only one of the styles is above, or below the Middle line, it will score 100.

## Section 5:

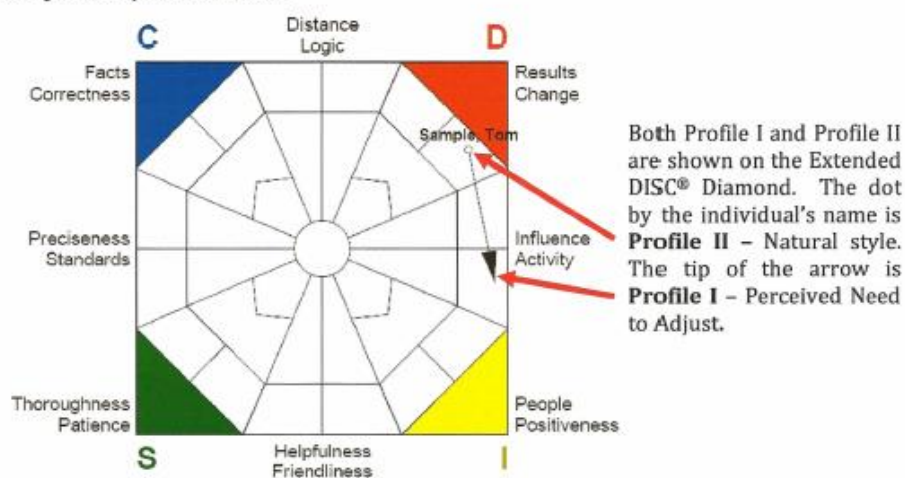
**Debriefing Your  
Client's  
Extended DISC®  
Individual  
Assessment**



## The Extended DISC® Diamond

The *Extended DISC®* Diamond is a powerful behavioral map that allows you to visually demonstrate the required behavioral modifications. It also provides the Natural Style (=Profile II) and Adjusted Style (=Profile I) in another format some clients may find easier to use.

The starting point of the arrow is Profile II. The end point, or the tip, of the arrow is Profile I. The arrow demonstrates the conscious need to adapt or adjust behavior.



As you review the *Extended DISC®* Diamond with your client, often the arrow draws the most attention. Please remember that the starting point of the arrow is Profile II and should get clearly most of the focus (Remember the 90%/10% Rule with Profile II and Profile I). Also, since Profile I is the Adjusted Style, its position will change over time. The arrow simply shows what the perceived need to adjust now is.

### Section 5:

#### Debriefing Your Client's *Extended DISC®* Individual Assessment

When you look at the arrow note two things:

1. To what direction is the arrow moving?
2. Where is the arrow moving away from?

The *Narrative Description* can be used for qualifying the validity of the results. The Profiles and the Diamond have the analysis results in their most detailed format and should, therefore, be analyzed first. The *Narrative Description* provides additional information to help in understanding the behavior of the individual and in initiating discussion with him/her.

The *Narrative Description* consists of the sections listed below. With each section, there are a few things to consider:

- **"Attributes"** – Which descriptions does your client believe to be the most significant to his effectiveness in the current role?
- **"Motivators"** – What motivators does your client believe to contribute to his effectiveness in present role? Which descriptions may cause him to be less effective?
- **"Tries to Avoid"** – Which descriptions does your client believe to have an impact on his effectiveness in the current role? What is the impact?
- **"Ideal Supervisor"** – How closely do these descriptions portray your client's current supervisor? How can your client communicate his needs to his supervisor?
- **"Communication Style"** – Which descriptions does your client believe to contribute to his communication effectiveness? Which descriptions may cause him to be less effective? Why?
- **"Decision-making"** – Which descriptions does your client think contribute to his success? What may cause your client to be less successful? Why?

**Section 5:**  
**Debriefing Your**  
**Client's**  
**Extended DISC®**  
**Individual**  
**Assessment**



When your client reviews the *Narrative Description*, expect him to disagree with some of the statements. The reason is that the *Extended DISC® Individual Assessment* was designed to bring into light blind spots that may be holding your client's performance back.

Extended DISC Leadership Assessment Narrative Description	Sample, Tom Extended DISC	03.02.2009
<p>This page is a description of how this style of person is typically seen by others. Read the text as such and use it to develop an overall picture. In evaluating specific sentences, it is important to consider a person's conscious ability to adapt behavior. In other words, while the text describes the typical behavior for individuals with this style, a person certainly can modify behavior to fit the needs of a particular situation or individual(s). Also, you may have already addressed the development areas by learning new skills.</p> <p><b>Attributes:</b> Purposeful, strong-willed, independent, direct, demanding, ambitious, communicative, motivating, decisive, active, busy, alert, social.</p> <p><b>Motivators:</b> Tom likes clear, measurable challenges where he can show what his capabilities are. He likes change, variety and several projects at the same time. He also likes freedom and tasks where Tom can personally determine his daily activity. He likes to deal with people but needs some distance and is not very willing to open up.</p> <p><b>Tries to Avoid:</b> Tom is strong-willed so cannot work in a limiting atmosphere. He wants to break free from rules and chains and overly explicit instructions. He is not the best person to do routine work because he gets bored very easily.</p> <p><b>Ideal Supervisor:</b> The supervisor must give him challenging tasks commensurate with his professional skill. The goals must be clearly determined initially, but then the supervisor should not interfere unless agreed. In need, the supervisor has to be severe and demanding. The supervisor should not be discursive, but present clearly what he has to say.</p> <p><b>Communication Style:</b> He is demanding and pushy and can be very unyielding and strict. He can also be motivating and inspiring and act through others. It depends on his attitude which role he plays at that moment. He is not a very patient listener.</p> <p><b>Decision-making:</b></p>		

## Section 5:

### Debriefing Your Client's *Extended DISC®* Individual Assessment

If your client disagrees with certain statements in the *Narrative Description* page, ask him to:

1. Consider the statements in various contexts, especially in new situations.
2. Consider if the statements used to be true until he consciously worked on these development areas.
3. Set the statement aside and return to it later after having a chance to reflect on the entire report.

**TIP:** It is recommended that other people be permitted to read the *Narrative Description* and comment on those parts of the text the individual does not identify in his behavior.

## Extended DISC® Questions Page

The *Questions* page is a very helpful coaching tool as it provides you with specific questions to uncover issues to help your client improve his/her performance. The questions are divided into two groups:

1. **Questions related to your client's expressed emotions** – The *Extended DISC®* System can detect certain underlying emotions (for example, uncertainty and frustration) that may be currently hindering your client.
2. **Questions related to your client's job** – This group of questions focus on how your client's Natural Style impacts his/her work performance.

Extended DISC Leadership Assessment  Questions	Person analyzed <b>Sample, Tom</b>	
	Organization <b>Extended DISC</b>	Date <b>03.02.2009</b>

**Questions relating to the person's expressed emotions:**

Apart from some frustration caused by a small lack of independence, he does not feel the need to slow down or otherwise not to control his own destiny.

In what way would you add to your current level of authority?

Presently he feels the need to emphasize his own extroverted character by trying to search for more contacts. He feels that he will achieve his goals by paying attention to other people.

How do you influence people?

This person is extremely active and hard-working by nature. It is very important for him to constantly get new incentives so that he will not get bored. The current surroundings seem to offer just enough.

When was the last time you were bored?

He needs an extremely great level of independence in his own work and does not like chains or restricting rules. At the moment, he does not seem to have any.

What decisions would you like keep to yourself?

**Questions relating to the job**

You are usually quite outspoken with people. What kind of people do you like?

You want all the possible tools at your disposal. What are you ready to take away from your

### Section 5:

#### Debriefing Your Client's *Extended DISC®* Individual Assessment

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The *Questions* page provides you with additional guidance in exploring the deeper meaning of your client's Profiles. It also offers specific and insightful help by listing specific questions you may want to ask your client. Use them as a means to really consider what kind of development plan to create.

#### **Section 5:**

#### **Debriefing Your Client's Extended DISC® Individual Assessment**

**NOTE:** Many coaches select the *Questions Page* as the last page of the *Extended DISC®* Individual Assessment. This allows them to easily decide if they will share the page with their client. Some coaches prefer not to share the page and, instead ask the question provided when they believe is the best time to ask them, if ever at all. Other coaches prefer the client receives the questions from a "third party" source and include it in the report. You may want to try both approaches to find what works best for you.

Now it is time to start putting together a **Behavioral Action Plan** to make sure your client achieves his goals. The real value for your client is using what he has learned from the *Extended DISC®* Individual Assessment, reflecting on what he would like to change or modify and practicing the behaviors over time. The method for doing this comes in the form of a **Behavioral Action Plan**.

Refer to the **Individual Strategy Worksheet** completed in Section 2 for a list of goals. Determine if your client's goals require an *Overall* adjustment, a *Specific/Situational* adjustment, or if the goal is more a *Key Player/Individual* adjustment.

**Overall** – These are adjustments your client may need to make overall. Example if you are a “high” D- or I-style you may decide to work on active listening and talking less.

**Specific/Situational** – These are specific adjustments for specific situations. Example: If your client's goal is to close more sales and he is a “high” S-style, he may need to be “D” like for brief moments to move the sales process forward.

**Key Players/Individuals** – These are adjustments your client may need to make to reach a goal that revolves around specific individuals. Example: Your client's goal is better communication with his team members. You can help to be very specific how he should to adjust his natural style to communicate with each of his team members based on *their* style.

Once you have helped your client determine the type of adjustments he needs to make, help him come up with specific scenarios and discuss how he will begin to make the behavioral adjustments. You can suggest him to journal to document when he adjusted his style, what the outcome was and how to improve further.

**Review and schedule your next session.**

## Section 7:

### Review and Wrap Up



## Appendix

The purpose of the Appendix is to provide you with additional information to get more value from the *Extended DISC®* Individual Assessments. In this section you will find:

- Definitions to the Behavioral Competencies
- Information about Invalid Profiles
- Interpretations of the Special Situations
- Individual Strategy Worksheet

### **Extended DISC® Behavioral Competencies Definitions:**

#### **Customer Service Competencies**

##### **Consistent, stable customer relations**

- Both the customers and the contacts to them remain mainly the same

##### **Building and maintaining customer files**

- Collecting, sorting and producing information about the customers

##### **Positive diverse contacts with customers**

- Several different types of contacts where it is important to keep the contacts positive.

##### **Brief, goal-oriented customer contacts**

- Contacts to customers are short and can go directly to the point.

##### **Taking care of the customer and creating goodwill**

- Serving and taking care of customer needs is important as well as Creating a positive environment

## Appendix

## **Team Competencies**

### **Being a fast and lively involver**

- Refers to the individual's involvement with the other team members

### **Participating and discussing while working**

- Needs to be able to concentrate on work but also participate and communicate

### **Demanding goal-setting**

- Setting goals bravely and courageously and wanting everyone to attain them

### **Organizing and implementing the team's duties**

- Organizing the daily activities of the team and checking that everything is done according to the plan

### **Independent; logical planning**

- Working independently, mostly with activities requiring logical planning

### **Constructive guidance and advice-giving**

- Giving advice and guiding others in a way that keeps people positive

### **Motivating and polishing the rough edges off of the others**

- Solving quarrels and disagreements, encourager of others

### **Firmly picking up the pace**

- Increasing the speed of the team with a goal-oriented attitude

### **Introducing a new perspective**

- Being able to constantly come up with new perspectives to old things

## **Appendix**





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