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# The Social Style Concept and Flexing the Advice Process

Adapted from MAA728: Financial  
Behaviour and Decision Making

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# The 'Social Style' Concept



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# Social Styles: Patterns of Behaviour

## ...that make us more like some than others

### Are you:

- Quieter
- Slower paced
- Facially controlled
- Monotone voice
- Indirect eye contact
- Casual posture
- Lean back

### Or:

- Louder
- Faster paced
- Facially animated
- Inflected voice
- Direct eye contact
- Rigid posture
- Lean forward



# The Social Style Concept (Merrill & Read)

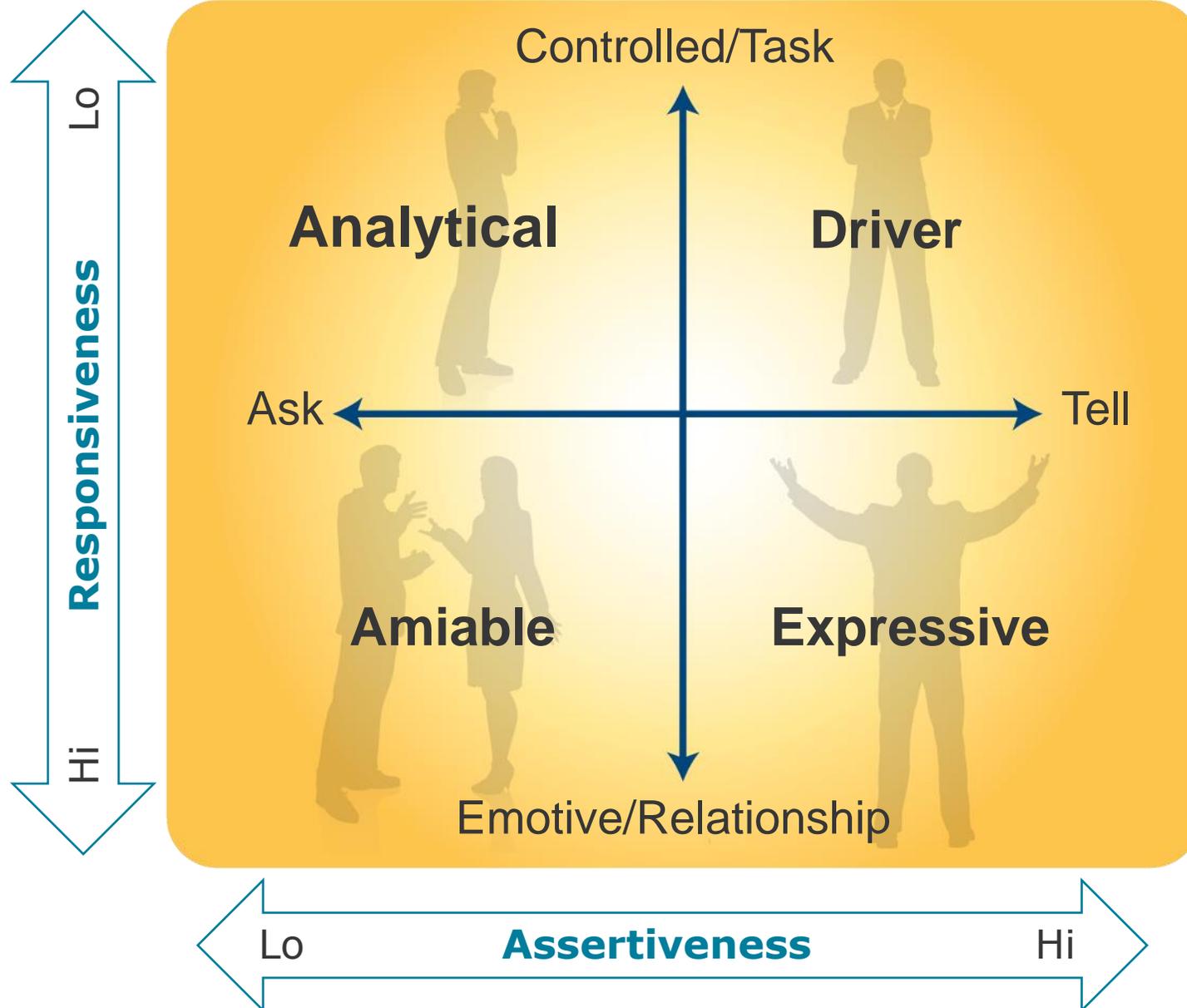
- **Social Styles**<sup>®</sup> are predictable patterns of **actions** that others can observe and agree upon for describing one's **behaviour**
- **Social Style** is not an absolute. It is, instead, a matter of degree.
- There is no “**best**” Style. All styles are successful and get results
- Most people **behave** in a way that will reflect one Style most of the time.
- We all have style **range** and the ability to situationally **flex** or adapt



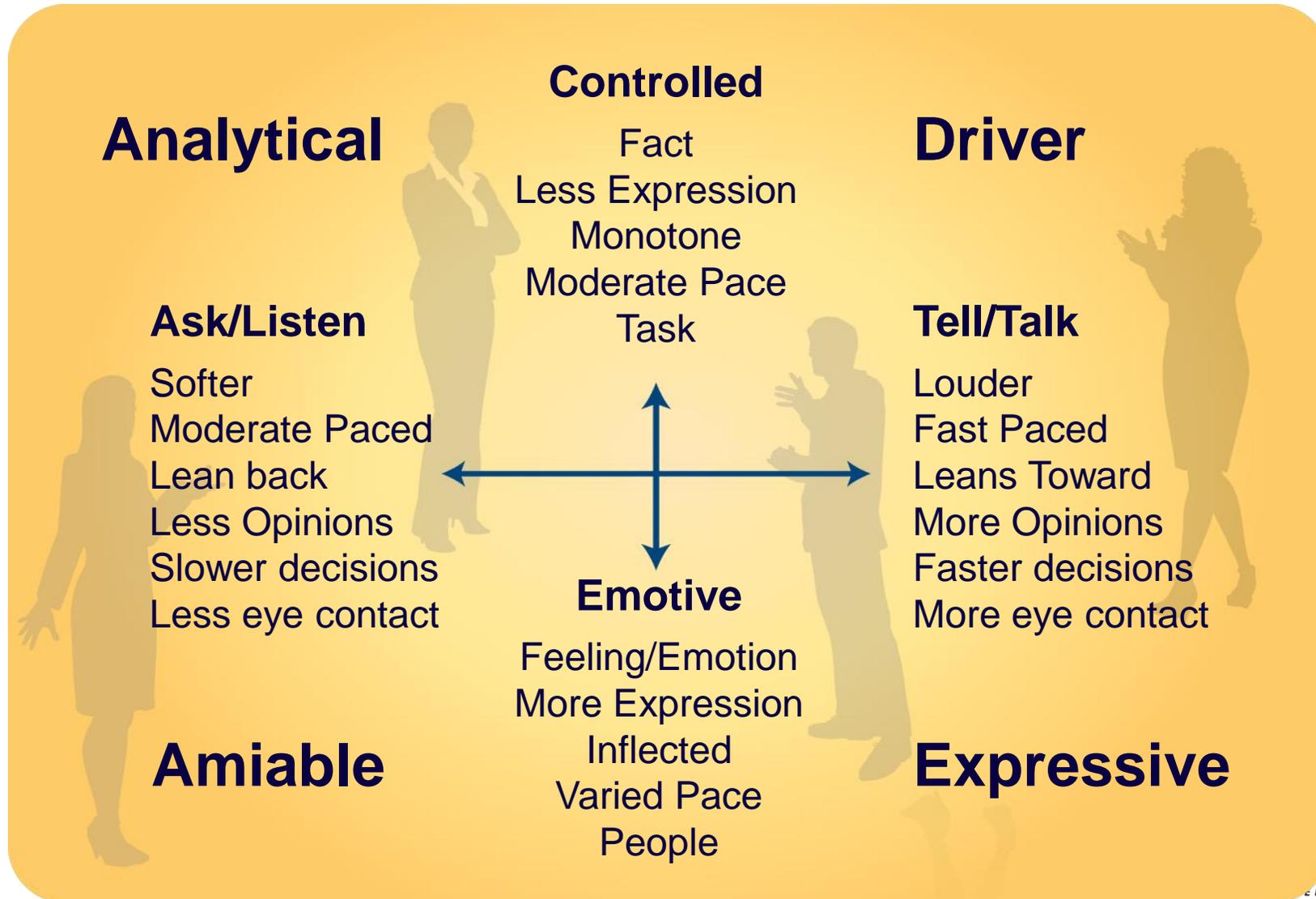
# Identifying Client's Social Styles & Flexing Your Style When Providing Advice



# Social Style Quadrants



# Social Styles...identifying behaviours:



# Style Flexing to Improve Your Versatility

- Temporarily **adjusting** your **behaviour** to manage tension and to encourage others to behave more **productively** with you
- Flexibility in working with others of other social styles is important for success
- “When people of two styles don’t get along, the problem isn’t incompatibility, it’s usually **inflexibility**.”
- “**Opposite**” styles require most adapting



# Four Steps to Style Flexing

**Recognise** the other person's style

**Plan** your flex: content and delivery

**Do** the flex, hold the meeting

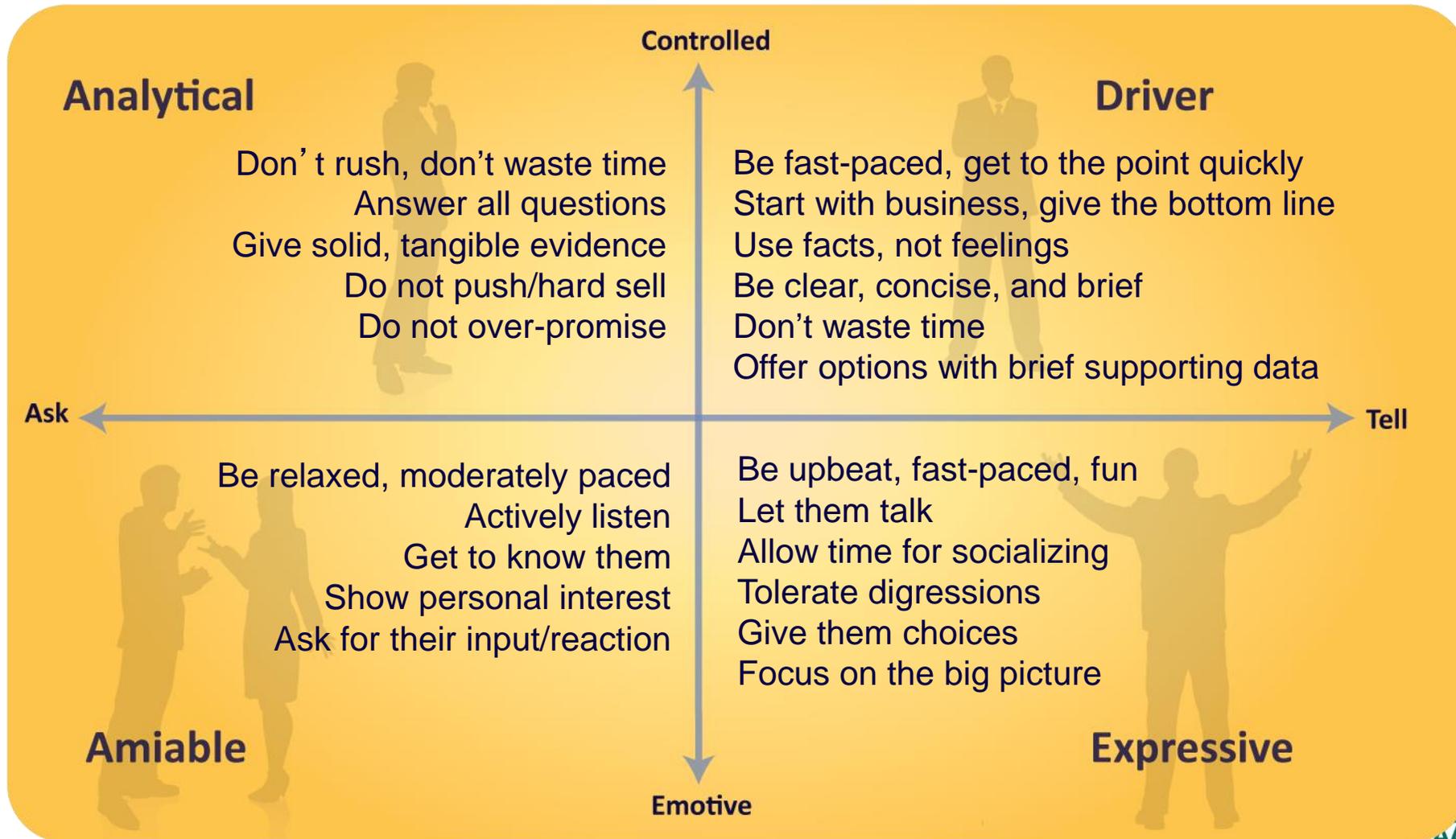
**Evaluate** how you did the flexing



# Improving Your Versatility



# Flexing to Style Preferences



# Style Flexing the Advice Process



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# Analytical clients expect advisers to:

- Adopt a **formal, task-oriented** approach to the advice process. They are comfortable when they can operate with a high degree of **objectivity**.
- Be well **prepared** with a carefully organized presentation pertinent to the task. They like to see the process move along at a **deliberate** pace with enough time for **thoughtful** consideration of the key points.
- Offer quick **confirmation** of advice expertise.
- Submit **factual, well-documented, detailed** information. Usually, this is the only kind of ‘interpersonal’ reassurance they require. “**Respect**” is their measure of personal value – respect for authentic data as well as self-respect.
- Support their **principles** and **reasoning**. Your presentation should be consistent with how they view the problem.
- Furnish solid **evidence** to help them make up their minds. They want you to provide enough relevant, accurate **data** that they can feel they’re making a completely **informed** decision.
- Assurance of follow-up service (preferably in writing) is also important to Analytical clients.



# Driving clients expect advisers to:

- Be **task-oriented** from the very start. With this style, business comes before relationships.
- Make the most **efficient** use of their time. They tend to be busy people with tight agendas. They want the job to be done quickly and done well.
- Provide them with insightful **information** early in the process - **factual**, documented reasons for problems your product or service can solve. They favor a **rational** over an emotional approach and are mainly interested in **benefits**. Drivers expect that the information we provide will be germane and accurate.
- Submit proposals that fit their **problems**. They have a strong grasp of their **needs** and expect that your ideas will support their agenda. If your plan differs from what they have in mind, they will consider it if you show how it will move them ahead.
- Offer options in a way that allows them to feel they are making the ultimate **decision**.
- When you ask them to take risks, provide them with the odds for **success**.



# Amiable clients expect advisers to:

- Have an **open** and **honest** approach to the advice process. They function well in an environment free from hidden agendas, but feel discomfort in the face of a cold, lets-get-down-to-business approach.
- Spend time to develop a **relationship**. They perform best when all relationship tension is reduced to a minimum before tackling the task. Like all clients, they expect good progress but prefer it to happen surely and deliberately.
- Provide assurance of being **congenial** and **trustworthy**. Reputation is important to them. They shy away from being rushed or high-pressured.
- Furnish **reassurance**. They hope that you will share their interests and problems.
- Give them personal support in terms of **feelings** and **situation**. They look for signs of willingness to build a personal as well as a business relationship. And they want to get the attention they feel they deserve.
- Provide them with **guarantees** and **assurances** during the advice process. They are not assertive risk-takers. They are much more **deliberate**, and they worry about the correctness of the decisions they make.



# Expressive clients expect advisers to:

- Develop the advice relationship in an **open, friendly** atmosphere.
- Be **tolerant** of their casual use of time, except when they are driving toward the goal. Expressives operate on **'goal time'** rather than clock time. They sometimes seem to deliberately cultivate a casual, laid-back approach without regard to time. However, once they make a decision, they like to see rapid progress and tangible results.
- Help them know **who** they're doing business with. They appreciate dealing with someone of **competence** and **self-confidence** and are impressed if you have the **expertise** to solve their problems. If they sense this is lacking, they begin to feel that their time is being wasted.
- Be open about sharing sincere **thoughts** and **feelings**. They see the adviser both as a professional integral to reaching their goals and as an individual.
- Provide them with **recognition** of (even applause for) their visions and actions. They look to you for this support. As long as you provide it, you are a valued person. They want to like you and are pleased when you show a sincere interest in building a **personal** relationship.
- Assure them that they can be confident in the **quality** of the product or services being rendered.

