



DNA Client Service Report™ Report for: Chris Coddington

Primary Communication DNA Style: **Information**
Secondary Communication DNA Style: **Goal-Setting**

Guidelines for Creating the Client Workflow for Chris Coddington:

Service Delivery	<ul style="list-style-type: none"> • Be reliable • Be to the point
Preferred Style of Interaction	<ul style="list-style-type: none"> • Email • Phone discussion
General Service Requests	<ul style="list-style-type: none"> • Email within 24 hours • Let them know within 24 hours the action steps
Ongoing Advisor Interaction	<ul style="list-style-type: none"> • Send research updates • Discussion as needed
Pre Transaction Contact	<ul style="list-style-type: none"> • Give them regular online information flows • Introduce the idea and do not push
Post Transaction Contact	<ul style="list-style-type: none"> • Email within 1 week, provide confirming info • Respond to questions as needed
Commitment Time to Buy	<ul style="list-style-type: none"> • Slow until research performed • Short if aligned to goals
Fact Finder Completion	<ul style="list-style-type: none"> • Will complete at home • Phone to respond to their questions
Reaction to Negative Events	<ul style="list-style-type: none"> • Will seek to analyze the cause then cut losses • Will be rational and want a solution to benefit from it
Need to Meet Senior Executives	<ul style="list-style-type: none"> • No need unless only way to overcome a problem • Prefer to ensure their issues are heard at the top level
Dealing with Support Teams	<ul style="list-style-type: none"> • Will firstly respect chain of command to resolve issues • Will be respectful but will go over their head in a crisis
Length of Phone Calls	<ul style="list-style-type: none"> • Long enough to provide details • Keep them short
Managing Purchasing Risk	<ul style="list-style-type: none"> • Independent validation • Free trial
Buyer's Remorse	<ul style="list-style-type: none"> • If not all information provided • If goals / returns not met
Technical Support Needs	<ul style="list-style-type: none"> • Will want detailed information to solve the problem • Will try to operate without it at first
Using New Systems	<ul style="list-style-type: none"> • Prepared to consider changes • Will if increases efficiency
Regulatory Compliance	<ul style="list-style-type: none"> • Compliant and respectful • Will test the boundaries