



# LDF Transform

PROJECT REPORT<sup>a</sup>

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# Preamble

## Summary

The declining sales of LDF in the field of telecoms are attributed by the management to inadequate *tactics* of the sales force, suggested by persistent trends in fruitless attempts to convince clients. Aiming for efficiency, the LDF management resolved to (a) capacitate its sales force to work with client profiles, (b) create a prototype ‘targeted’ sales procedure with the help of MBTI® and *Systems Planning*<sup>SM</sup>, and (c) diversify sales introducing IT services. The development of the sales force, together with the new procedure and extended portfolio, are expected to transform LDF as a whole, aiming for *efficiency* in the client relations and — by extension — the entire company.

## Credits

The project was executed between September 2015 and July 2016. The members of the core project team are indicated on the cover page of this document, including their (a) identification, (b) affiliations, and (c) roles and responsibilities. Starting in 2016, the work was accompanied by Maria Serra of P4S — *People for Success* (<http://www.p4s.pt>).

The project was carried out *pro bono* on the premises of LDF and UTAD, within the scope of academic R&D. The deployment of the project outcomes, as well as the eventual commercialisation of the project outcomes, are the responsibility of the core project team.

The information contained in this report was approved by the core project team after considering issues of confidentiality. Authorisation to use the registered trademark and associated symbols of MBTI® was granted to F. Novais (authorised MBTI® agent) by OPP in November 2015.

# 1. Setting

## 1.1 Object and intent

LDF has been facing an increasing number of ‘fruitless’ sales attempts, in which the sales force was unable to persuade the potential clients, and this was reflected in declining sales. The management attributes the root cause to inadequate *tactics* of the sales force, and aims for *efficiency* through a transformation of the company in three directions: (a) development of the sales force through study and training, to be able to address each client according to the traits of their personality type; (b) procedures of the company to be followed by the sales force when approaching the clients; (c) diversification of the sales portfolio by introducing IT services.

The present applied R&D project aims to (a) gain insight into the personality profiles of the LDF clients, and (b) create a prototype ‘targeted’ sales procedure for LDF (IT/ telecoms sector), yet with general validity to be expandable/ adaptable to other sectors. This procedure should include (a) quick diagnostics to identify client profiles, and (b) a range of pre-formulated techniques to suit the identified client profile.

## 1.2 Methodology

Client profiles are explored with MBTI® (TMBF, website), while structures, procedures, and plans are documented with *Systems Planning*<sup>SM</sup> (website). Hence, the diagrams of the project reflect both notations: MBTI® and SPML™ — Figure 1.1.

The contributions of the project are illustrated in Figure 1.2. Client profiles are based on the broad MBTI® literature — e.g. Brock (1994); TMBF (website). The sales protocol (Figure 3.1) was originally conceived for the project, and is distinctly different from the one considered by Brock (1994) — i.e. relationship, needs, action, agreement. The diagnostics inference is based on the client profiles (§ 2) and the sales protocol (§ 3), taking into consideration the time restrictions of the operation ‘on the ground’. The sales pitch is based on the client profiles (§ 2), the profile diagnostics (§ 3.1), drawing on suggestions by Brock (1994) such as ‘the sounds of... S T, N T, etc.’, and the specifics of the sales object (§ 4). Finally, the sales follow-up procedure is drawn from the sales protocol (§ 3).

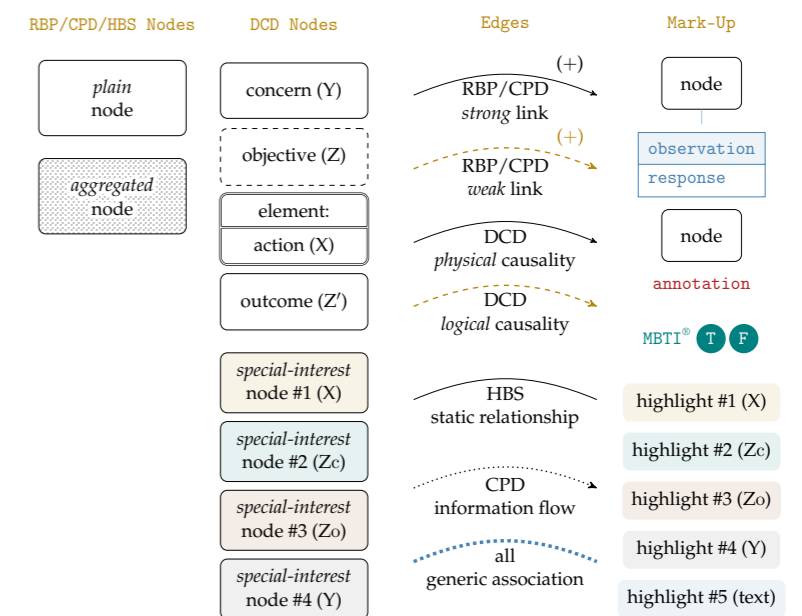


FIGURE 1.1 [KEY] The combined MBTI® and SPML™ notation

The contributions of the project are simulated in one case study (§ 5), featuring a commercial product identified as ‘office suite’, withholding commercial names.

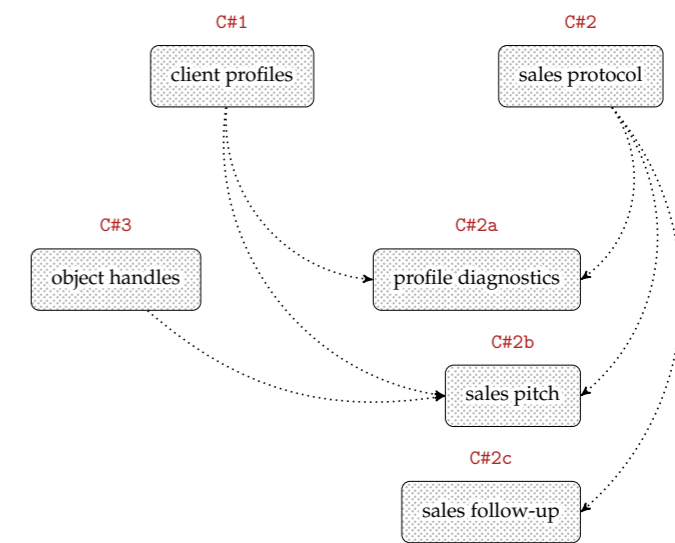


FIGURE 1.2 [CPD] Information flow between the project contributions

## 2. Client Profiles — C#1

### 2.1 Function pairs

MBTI® types regarding *information* (S / N) and *decision* (T / F) combine to create ‘function pairs’, which are important for *choices* such as in the context of purchasing (TMBF, website). These pairs represent the ‘mental functions’, or the ‘inner pairs’ of each quadruplet. In contrast, the outer elements of each quadruplet represent attitudes or orientations for ‘energising’ (I / E) and *judging* or *perceiving* (J / P).

The function pairs can be abstracted further, and elevated to *client profiles*. Contrary to people, to whom they refer, and whose qualities (or preferences) are *personal*, client profiles become *objects of study* that at the same time are also *behavioural models* (e.g. archetypes) — Table 2.1.

| PROFILE | CHARACTER            | COGNOMEN            |
|---------|----------------------|---------------------|
| S T     | zoom-in & objective  | ‘pragmatic analyst’ |
| S F     | zoom-in & personal   | ‘personal truster’  |
| N T     | zoom-out & objective | ‘creative hipster’  |
| N F     | zoom-out & personal  | ‘hippy dreamer’     |

TABLE 2.1 Client profiles correspond to MBTI® *function pairs*, while cognomens give them a ‘human touch’ or mnemonic

### 2.2 Analysis

Thanks to their objective, abstract, and over-arching (or generalised) nature, client profiles can be analysed or decomposed into their traits (Brock, 1994), from which a number of practical ‘handles’ can be derived — Figures 2.1–2.4.

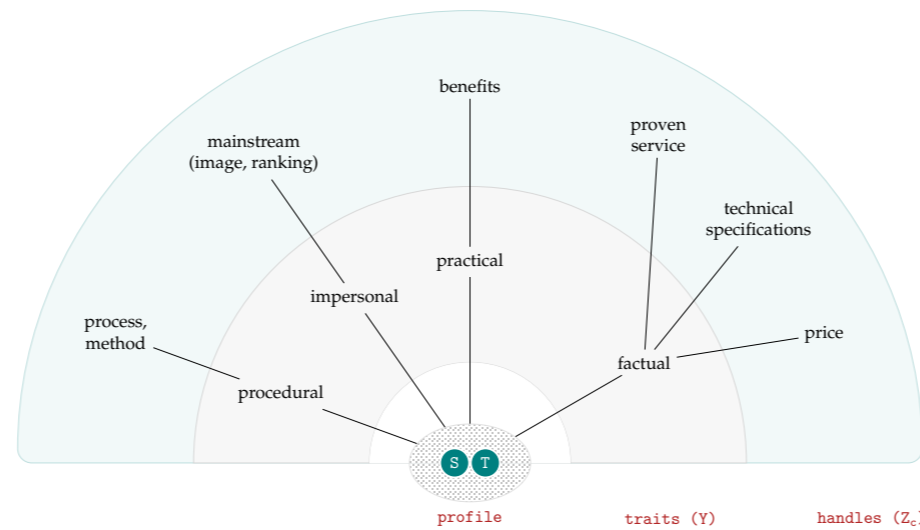


FIGURE 2.1 [HBS] The S T client profile, its traits, and ‘handles’

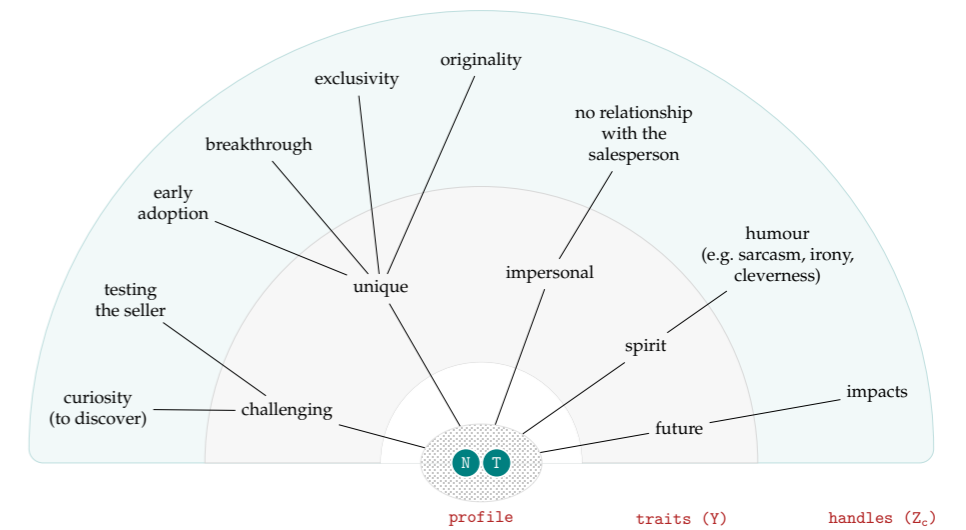


FIGURE 2.3 [HBS] The N T client profile, its traits, and ‘handles’

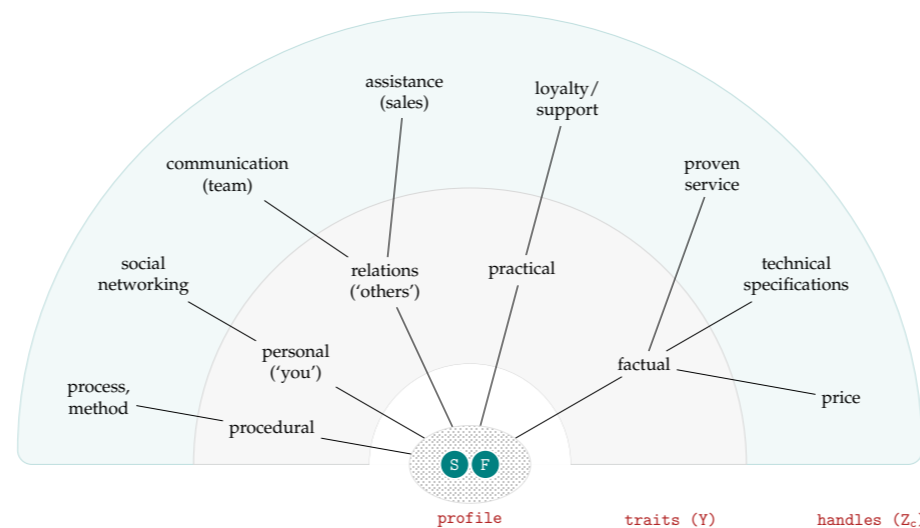


FIGURE 2.2 [HBS] The S F client profile, its traits, and ‘handles’

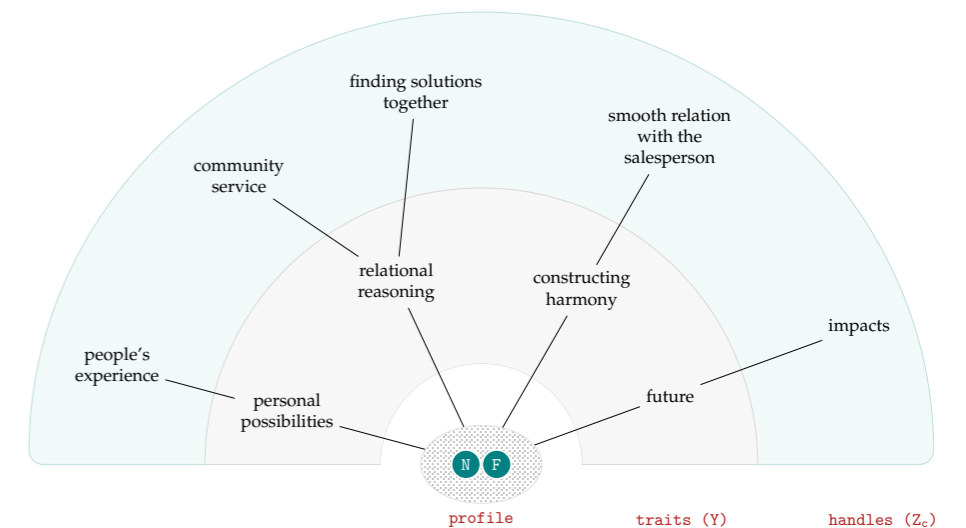


FIGURE 2.4 [HBS] The N F client profile, its traits, and ‘handles’

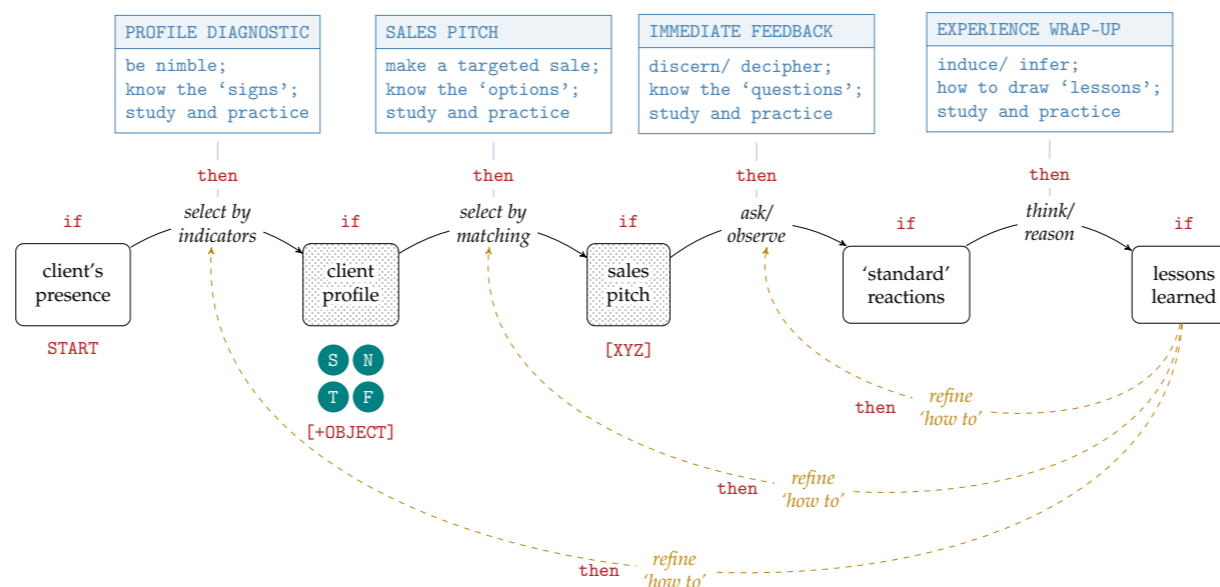


FIGURE 3.1 [CPD] Single-attempt sales process protocol with annotations

### 3. Sales Protocol — C#2

An orderly sales process, respecting client profiles (§ 2) and responding with standard options, requires a protocol — Figure 3.1. Following a sales protocol permits the sales force to promptly direct or *pitch* the sales appropriately to each client profile, subject to a quick type assessment (§ 3.1).

The single-attempt sales process protocol (Figure 3.1) contemplates (a) a ‘client profile diagnostic’ (§ 3.1), (b) a ‘sales pitch’ directed towards the diagnosed client type (§ 3.2), (c) immediate feedback, and (d) a ‘wrap-up’ of the experience (§ 3.3). ‘Insisting’ sales protocols are expected to have a second or more attempts, incorporating indications from the feedback. In any case, the more ‘technical’ finalisation of the sales is beyond the scope of the project.

#### 3.1 Profile Diagnostics — C#2a

Apart from thorough/ exhaustive MBTI® type assessments, client profiles can be diagnosed ‘quickly’ by *inference* from selected indicators — i.e. reaching conclusions on the basis of evidence and reasoning (Figure 3.2).

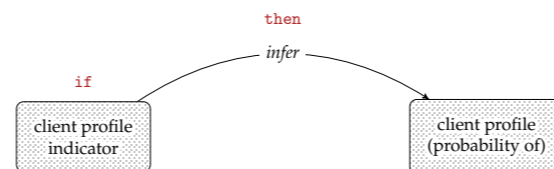


FIGURE 3.2 [CPD] The diagnostics inference for a single indicator

The inference operation of Figure 3.2 needs to be iterated for a sufficient number of indicators (*ca.* three to four). When the profile indicators converge, then the client profile can be ‘safely’ assumed. If there is doubt, either (a) more iterations should be required until convergence is reached, or (b) a *risk* can be taken with a ‘working assumption’. It should be noted that the present study is aimed mainly at existing clients or ‘second meetings’. ‘First meetings’ with clients should require a quick assessment or triage, which is beyond the scope of the project.

#### 3.2 Sales Pitch — C#2b

Based on the profile diagnostics (§ 3.1), sales are directed or ‘pitched’ at the particular client profiles. Each full ‘sales pitch’ (Table 3.1; Figure 3.3) is intended to satisfy a client profile with its particular *traits* ( $Y_c$ ), and thus contains (a) a set of appropriate

*handles* ( $Z$ ) (e.g. Figure 2.1), (b) suitable *cues* ( $X$ ) for each handle (e.g. Table 3.1), and (c) information about the sales object ( $Z_o$ ).

| TRAIT ( $Y$ ) | HANDLE ( $Z_c$ ) | HANDLE ( $Z_o$ ) | CUE ( $X$ )  |
|---------------|------------------|------------------|--|
| factual       | tech specs       | # of devices     | it can be accessed from five different devices       |
| factual       | tech specs       | programs         | it includes 15 programmes: $P_1, P_2, \dots, P_{15}$ |

TABLE 3.1 Sample sales pitches for the S T profile

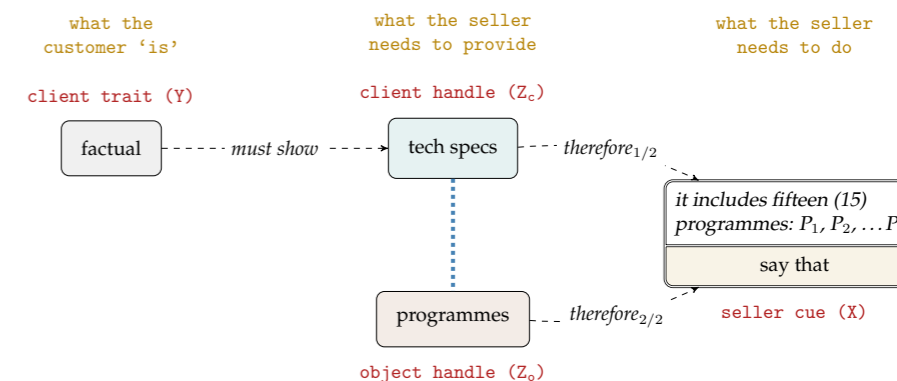


FIGURE 3.3 [DCD] The logic of a full sales pitch for the S T profile

The trait-to-handle conversion is of methodological nature, subject to inspection and revision. Table 3.1, for instance, collects selected traits of a particular type (Figure 2.1), identifies corresponding client and object handles ( $Z_c$  and  $Z_o$ ), and assigns cues ( $X$ ) as they seem appropriate. While the methodology is set, the choices to be made are subject to personal or group interpretations, which in turn are subject to experience, formal preparation, and preferences.

For *isolated sales* or sales to a *single* client profile, it is assumed that each sales event is given a unique pitch. For multi-profile sales, these pitches must be coordinated and homogenised, which creates a degree of complexity beyond the scope of the present project.

In addition, sales ‘pitches’ must be accompanied by appropriate communication media for each profile — e.g. spreadsheet tables for  $\text{S T}$ , Yammer or Facebook for  $\text{S F}$ , examples of famous companies for  $\text{N T}$ , and philanthropy examples for  $\text{N F}$ . Finally, the presence of a sales person — and, for simplicity reasons, disregarding his/ her own personality type — is crucial for some client types (e.g.  $\text{S F}$  and  $\text{N F}$ ), while it may not mean much to others (e.g.  $\text{N T}$ ).

### 3.3 Sales Follow-up — C#2c

Sales events should be followed by *un-biased* (e.g. factual) observations made by the sales person, and/ or by voluntary feedback provided by the client — all preferably in a written form, probably in a freestyle notes style rather than a pre-fabricated questionnaire.

In a single-attempt sales protocol, as in the current project (Figure 3.1), the feedback from the event concludes with ‘lessons learned’ about the three previous steps (Figure 3.4). Such lessons may be fed back into the actions of the sales protocol (Figure 3.1), and/ or contribute to the overall experience and maturity of the sales person.

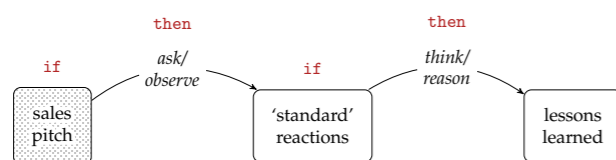


FIGURE 3.4 [CPD] Sales follow-up concluding the sales protocol

## 4. Object Handles — C#3

Whether a product or a service, the sales object has a key role in the sales pitch (§ 3.2), contributing with its *object handles* ( $Z_o$ ) — i.e. specific characteristics of the sales object, such as indications often given ‘on the box’.

The number of ‘objects’ of a reasonably small-scale commercial enterprise is fairly limited, and each one of those objects should be well studied in advance — i.e. before any attempted sale.

As an illustration, a set of *object handles* ( $Z_o$ ) for a selected sales object (an ‘office suite’) are marked on the inner coloured circle of Figure 4.1. A correspondence has been established between these and the *client handles* ( $Z_c$ ), laying on the outer coloured circle. Finally, the ‘cue-space’ ( $X$ ) is represented by the yellow-tone circle between the two others (Figure 4.1).

| OBJECT HANDLE ( $Z_o$ )                                     | TYPE  |
|---|-------|
| Personalised support 24/7                                   | Claim |
| Customisable social networking                              | Claim |
| Improves efficiency   | Claim |
| Plenty of functionality to be explored                      | Claim |
| First edition   | Fact  |
| Used by 10 million customers worldwide                      | Fact  |
| The suite contains 15 programmes: $P_1, P_2, \dots, P_{15}$ | Fact  |
| A single, all-inclusive licence costs €9.95 PCM             | Fact  |

TABLE 4.1 Examples of ‘on the box’ object handles and types

Some of the object handles may be factual, while others are mere claims (Table 4.1). These are expected to have different appeal to the four client types (Figures 2.1–2.4), as illustrated in the simulations (Tables 5.1–5.4).

## 5. Simulation and Beyond

Tables 5.1–5.4 illustrate the full sales pitches for the four client profiles, referring to the same selected product used to illustrate the object handles (§ 4) — an office suite (brand name withheld).

### 5.1 Validity

Some of the contributions of the project have global validity — for instance, the *client profiles*, based on MBTI® experience. The *process protocol* was created for LDF, but also has global applicability. The *profile diagnostics* are far from an ideal solution, but still are operational and globally suitable to ‘pressing’ situations such as assessments during a time-restricted client contact. Finally, the *sales pitch* model created specifically for LDF also has global validity for the client profiles.

On the contrary, the *sales follow-up* model is limited to short-term client contacts and is not applicable to marketing strategies. The *object handles* are specific to selected objects, although some of them are transferable to other ‘sales objects’. A thorough profiling study may be required for the range of products and/ or services marketed by an enterprise.

### 5.2 Future work

The outcomes of the project are to be deployed by LDF. Appropriate *training* of the sales force is key to the success of deployment, and the contributions of the project (Figure 1.2) stand out as references for a training programme.

Project follow-up and feedback from deployment are highly desirable in order to (a) refine the contributions of the project, (b) fine-tune their application at LDF, and (c) pursue further applications.

Further research may explore issues deemed beyond the scope of this project, such as (a) the practical side of finalising the sales (Figure 3.1), (b) appropriate communication media for each profile (§ 3.2), and (c) pairing the personality types of the salesperson and the client.

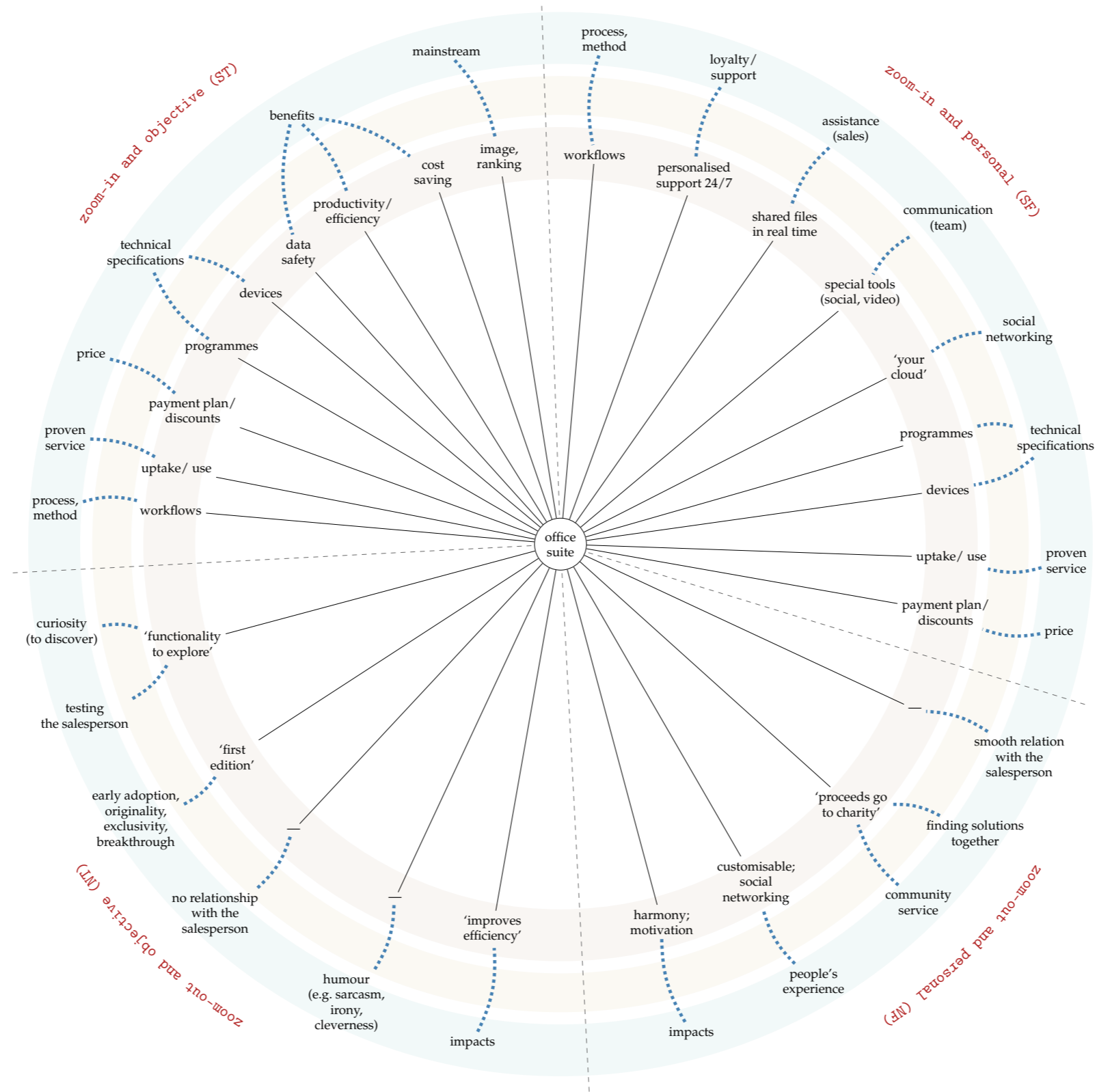


FIGURE 4.1 [HBS] Generic *object handles* ( $Z_o$ ) for the selected sales object (inner circle) and corresponding *client handles* ( $Z_c$ ) (outer circle)

| TRAIT (Y)  | HANDLE (Z <sub>c</sub> ) | HANDLE (Z <sub>o</sub> ) | CUE (X)  |
|------------|--------------------------|--------------------------|--|
| factual    | tech specs               | # of devices             | <i>it can be accessed from five different devices</i>  |
| factual    | tech specs               | programs                 | <i>it includes 15 programmes: P<sub>1</sub>, P<sub>2</sub>, ... P<sub>15</sub></i>   |
| factual    | price                    | payment plan/ discount   | <i>it costs €9.95 PCM, but this month there is a promotional offer for €4.95</i>   |
| factual    | proven service           | uptake/ use              | <i>businesses B<sub>1</sub>, B<sub>2</sub>, and B<sub>3</sub> (credible entities) use it (100,000 businesses in the EU)</i>              |
| practical  | benefits                 | productivity/ efficiency | <i>it can reduce the time of a task (e.g. budgeting, at least by 10%) because the work is in sync</i>                                    |
| practical  | benefits                 | cost saving              | <i>it is cheaper to buy and run than the offline versions: €199.95 base plus €49.95 per upgrade (1 device) vs. €9.95 PCM (5 devices)</i> |
| practical  | benefits                 | data safety              | <i>in the event of an accident (e.g. theft, virus, damage), the product has a program (P<sub>14</sub>) where all the data is saved</i>   |
| impersonal | mainstream               | image, ranking           | <i>this is the top seller in the world, among the top clients</i>  |
| procedural | process, method          | workflows                | <i>the suite uses world-standard procedures to execute everyday tasks (e.g. synced scheduling)</i>                                       |

TABLE 5.1 Simulation of the **S** **T** sales pitch for the selected product

| TRAIT (Y)          | HANDLE (Z <sub>c</sub> )                 | HANDLE (Z <sub>o</sub> )                                | CUE (X)   |
|--------------------|--|---|---|
| factual            | tech specs                               | programs  | <i>it includes 15 programmes: P<sub>1</sub>, P<sub>2</sub>, ... P<sub>15</sub></i>  |
| factual            | price                                    | payment plan/ discount                                  | <i>it costs €9.95 PCM, but this month there is a promotional offer for €4.95</i>  |
| factual            | proven service                           | uptake/ use   | <i>businesses B<sub>1</sub>, B<sub>2</sub>, and B<sub>3</sub> (credible entities) use it (100,000 businesses in the EU)</i>                       |
| practical          | support/ loyalty                         | personalised support 24/7                               | <i>you have a team to help you, and I will be in touch with you during the process</i>  |
| personal (you)     | social networking                        | 'your cloud'  | <i>you can get in touch with your team, anytime, anywhere</i>   |
| relations (others) | assistance (sales); communication (team) | shared files (real time); special tools (social, video) | <i>you can improve the team spirit, increasing the motivation by the engagement that the software permits — including your clients and family</i> |
| procedural         | process, method                          | workflows   | <i>the suite uses world-standard procedures to execute everyday tasks (e.g. synced scheduling)</i>  |

TABLE 5.2 Simulation of the **S** **F** sales pitch for the selected product

| TRAIT (Y)   | HANDLE (Z <sub>c</sub> )                             | HANDLE (Z <sub>o</sub> )              | CUE (X)   |
|-------------|--|---------------------------------------|---|
| unique      | exclusive, early adoption, breakthrough, originality | 'first edition of the latest version' | <i>this is the latest (or special) edition of the suite</i> |
| challenging | curiosity (to discover); testing the seller          | plenty of functionality (to explore)  | <i>the suite has new tools and is highly customisable</i>   |
| future      | impacts  | improves efficiency                   | <i>this will improve company efficiency in a short time</i> |
| spirit      | humour (no repetitions), sarcasm, irony, cleverness  | —                                     | —   |
| impersonal  | no relationship with the salesperson                 | —                                     | —   |

TABLE 5.3 Simulation of the **N** **T** sales pitch for the selected product

| TRAIT (Y)              | HANDLE (Z <sub>c</sub> )                      | HANDLE (Z <sub>o</sub> )                               | CUE (X)   |
|------------------------|---|--|---|
| personal possibilities | people's experience                           | customisable, social networking                        | <i>the CEO of [...] says the suite improved everyone's wellbeing by reducing task time and facilitating social networking</i> |
| relational reasoning   | community service; finding solutions together | part of the profits go to charity (e.g. HIV, refugees) | <i>by using the suite you are helping the [...] charities: the maker gives €Q per year for W children to go to school</i>     |
| constructing harmony   | smooth relation with the salesperson          | —  | —   |
| future                 | impacts                                       | harmony, motivation                                    | <i>the suite will improve the motivation of your employees, and an overall harmony in the company</i>                         |

TABLE 5.4 Simulation of the **N** **F** sales pitch for the selected product





## 6. Conclusion

The project sought and gained insight into the personality profiles of clients through the use of MBTI<sup>®</sup> theory and graphical organisational techniques of Systems Planning<sup>SM</sup>. The project also created a prototype targeted sales procedure for LDF, ready for deployment, together with an object handle map of an LDF sales object (an 'office suite') and a simulation of that sale to four client types. The next steps are deployment (including sales force training) and feedback for potential refinement of the contributions, as well as further research into special-interest issues.

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