

One size does not fit all: enhancing sales role plays with The Four Tendencies

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ABSTRACT

The Four Tendencies personality framework, as developed by Gretchen Rubin, allows insight into one's typical responses to both inner expectations (e.g., a personal goal like a New Year's Resolution) and outer expectations (e.g., a request from a classmate or coworker). While the Four Tendencies could be applied to many concepts within the marketing curriculum, including increasing team cohesion in any teamwork-based assignments, this paper focuses on a way to enhance closing skills for sales students. By incorporating The Four Tendencies framework, sales students can tailor their sales closing techniques to properly fit the tendencies of their buyers. Results from implementing The Four Tendencies in a Foundations of Professional Selling curriculum does appear to enhance learners' skillsets and confidence in the final, and often most challenging, step of the selling process – closing the sale.

Keywords: marketing education, sales closing techniques, The Four Tendencies, personality framework, pedagogy

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INTRODUCTION

The curricula of most marketing and sales programs include a substantial amount of professional development topics and self-assessments to help students better understand themselves, be more marketable to employers, and have a smoother transition from student to professional. These professional development topics include LinkedIn projects (Peterson & Dover, 2014), networking projects (Black, Milovic, & Dingus, 2023), and completing industry certifications (Cowley, Humphrey, & Muñoz, 2021). A recent paper even suggested teaching students about ad agency best practices as a way of teaching time management skills (Watson, 2023). On the self-awareness side, marketing students often engage in self-assessments (e.g., Myers-Briggs, True Colors) to help them understand their own personality as well as the personalities and behaviors of those around them.

LITERATURE REVIEW

In most introductory level sales classes, students complete a social styles assessment (Castleberry & Tanner, 2014) that is used as a basis for discussion about their own interactions as well as how a prospective buyer may interact with them. Social styles are considered when building rapport, designing questions, and developing a persuasive sales presentation. However, when challenged with applying the sales curriculum, students often view the final step of closing the sale as the most stress-inducing portion of the process. The actual act of “making an ask” of the buyer can be both intimidating and embarrassing for the seller. The authors are not aware of any pedagogical literature focused on helping students make the ask and close the sale, either. So, what are students to do? What are future sales professionals to do? How do they make an ask in a way that the buyer will want to fulfill? A recent shift in sales education is that, rather than teaching students how to sell, instructors are showing students how to teach their prospects to buy (Authority Magazine, 2020). With this, sellers must know how to effectively set expectations with their buyer and what type of expectations will motivate them to action. To aid this challenge, this paper introduces Gretchen Rubin’s Four Tendencies Framework (2017) into sales pedagogy. While the Four Tendencies could be applied to many concepts within the marketing curriculum, this is the first paper to identify a way to enhance closing skills for sales students.

The present study examines students’ attitudes and beliefs regarding the utility of using a personality framework, The Four Tendencies (Rubin, 2017), in a Foundations of Professional Sales class. Through introducing the concept of The Four Tendencies, sellers can learn more about themselves, and the buyer, in order to close with confidence. After introducing students to the Four Tendencies and aligning the topic with different types of closes/asks, students were surveyed to objectively assess the impact of including this lesson in the course. Including a new personality assessment, The Four Tendencies (Rubin, 2017), does appear to enhance the Foundations of Professional Selling curriculum, specifically with the intention of furthering developing the learners’ skillsets and confidence in the final step of the selling process – closing the sale (e.g., making the ask).

The Four Tendencies

The Four Tendencies is a personality framework for understanding how people respond to inner expectations (e.g., personal goals like a New Year's Resolution) and outer expectations (e.g., a request from a coworker, a sales pitch to make a purchase) (Rubin, 2017). The four-part framework divides people into categories based on their *tendency* to follow inner and outer expectations: Upholders (who meet both inner and outer expectations), Obligers (who easily meet outer expectations but struggle to meet inner expectations), Questioners (who keep inner expectations but question outer expectations), and Rebels (who tend to rebel against both inner and outer expectations) (Rubin, 2017). Two studies have used the Four Tendencies framework to increase positive outcomes, including health treatment adherence in patients (Kirk et al., 2017) and levels of self-awareness in health professions students (Childs-Kean, Edwards, & Smith, 2020).

For years, students in sales classes have studied the Social Style Matrix. Social styles are helpful for helping students decide how to build rapport with a prospect, choose the pace of the conversation, and identify how much emotion to build into a sales presentation for it to be most effective on a particular prospect. Learning about the Four Tendencies amplifies the ability for students to customize their sales conversations because they know what motivates a prospect to act. Just like with social styles, salespeople incorporating the Four Tendencies in their selling methods are unable to know with certainty what "type" their prospect is, but with practice they will get better at identifying the different tendencies in their prospects. Awareness of the Four Tendencies will help them to bring sales meetings to a productive ending.

CLASSROOM IMPLEMENTATION

This unique lesson has three objectives: First, students learn about their own habits, specifically their own *tendency* when it comes to meeting inner and outer expectations. Secondly, this lesson helps learners consider how they like to be asked to do something and, similarly, how they tend to ask others to do something (whether effective or not). Finally, this lesson helps them amplify their closing skills for sales such that they can be more effective by directly aligning the Four Tendencies with the six different categories of "closes" commonly taught in sales courses. Like most introductory sales courses, the course includes a large role play project that many students found to be intimidating. As shown later in Table 2, students perceive that utilizing their knowledge of the Four Tendencies during their role play conversation could increase their confidence, the flow of the conversation, their ability to close, the outcome of the buyer (i.e., success of the ask), and even their grade. Specific details of how the concept of The Four Tendencies was integrated into an introductory sales course follow.

The Four Tendencies were introduced, explaining that tendencies shed light on how one responds to inner and outer expectations. Students discovered their own tendency (Upholder, Obliger, Questioner, or Rebel) by completing the short, free The Four Tendencies quiz on Rubin's website (<https://gretchenrubin.com/quiz/the-four-tendencies-quiz/>). A short YouTube video (<https://www.youtube.com/watch?v=QmpWW-KibOo>), which introduces the Four Tendencies and their application in a workplace setting, was shown to the class.

Students were led in a general class discussion that addressed the questions, "How could you apply the Four Tendencies to your closing statements (making the ask) during your role play?" and "How could this help you reach your goal more confidently?" The discussion

continued by focusing on how buyers are motivated through the closing process (i.e., what factors are likely to bring them to a purchase decision). To synthesize their knowledge of the Four Tendencies framework and its potential impact on the closing process, students engaged in an activity (see Appendix for the specific in-class worksheet) in which they were asked to, in the role of the *seller*, create closing statements that would be appropriate for *buyers* that exhibited each of the Four Tendencies. Students were reminded of examples of each of the six general categories of closing statements (Direct, Indirect, Guidance, Choice, Benefit, and Next Step), as well as profiles of each tendency explaining clues to help to identify the tendencies, and ways to motivate others with each of the tendencies.

The learning objectives of this innovation are to introduce the skillset of closing a sale (making an ask) within the selling process, through the lens of the Four Tendencies. Students discover that how we respond to expectations from ourselves (and others) can help us to achieve our goals, and actively applying the Four Tendencies and adjusting closing statements can increase one's confidence and ability to close the sale. Through the discovery of their own current tendency, students were then challenged to apply each tendency in the creation of closing statements to help them increase their overall confidence in successfully completing the sales process. Throughout this session, students have the ability to increase their confidence in various skillsets including teamwork, self-discovery, critical thinking, and the closing of sales.

METHODOLOGY AND DESIGN

The Four Tendencies were presented at one public midwestern university as part of the curriculum in three sections of its face-to-face Foundations of Professional Sales course during the Spring 2023 semester. Across the three sections, which were taught by the same instructor in an identical manner, 50 students (a 100% response rate for those in class the day of this original lesson) completed an online survey about their impressions of the Four Tendencies and how well this content integrates with the development of their sales skills. Respondents were primarily juniors (50%), followed by sophomores (28%), freshmen (12%), and seniors (10%), and the students identified primarily (70%) as women. The survey was administered in Qualtrics, and IRB approval was attained by the institution for this project.

This Foundations of Professional Sales course has a cumulative sales call role play project toward the end of the semester that students often find to be fairly intense. In the survey, students were asked the following questions using a 5-point, Likert-style scale: "How much do you like the idea of completing your sales role play in general?", "How much do you like working toward your role play?", "How well has your sales role play prep gone?". Additionally, students were given a yes/no option to answer the question, "Are the Four Tendencies worth teaching in this class?" Additionally, students were asked to identify their result on the personality assessment (i.e., their "tendency"), whether they believe their tendency is a good reflection of how they respond to internal and external expectations, and ways in which they felt applying the knowledge gained from the Four Tendencies lesson would have impacted their role play (e.g., confidence, flow of conversation, ability to make the ask/close, overall outcome, and grade).

RESULTS

The measures detailed previously were taken to assess whether the Four Tendencies lesson should be integrated into future semesters of this introductory-level sales course and whether students agreed it would be beneficial to learn their tendency and how knowledge of the Four Tendencies can translate into more strategic sales conversations. As shared in the next session, these measures demonstrate that students found great value from this knowledge. Students in this course prepared for their sales role play without any knowledge of the Four Tendencies. Results as indicated in Table 1 (Appendix) 1 show students had a slightly more positive response than neutral to express how much they liked working toward and completing their sales call role play. When asked how well their role play preparation had gone, the mean response was 3.02, indicating it went “moderately well.” See Table 1 in the Appendix.

After the major sales call role play project in this course, students were introduced to the Four Tendencies in the lesson described above. Specifically, students learned about the Four Tendencies, discovered their own tendency, and discussed how their tendency can most effectively persuade a prospect to action and make mutually beneficial arrangements with other tendency types. Following the lesson, students agreed overwhelmingly (i.e., 98% said “Yes”) that the Four Tendencies “are worth teaching in this sales class.”

When the 50 students identified their tendency on Gretchen Rubin’s assessment, 26 students (52%) were obligers, 12 were identified as questioners (24%), 11 were upholders (22%), and 1 student (2%) identified as a rebel. When asked if they “think [their] Tendency is a good reflection of how [they] respond to internal and external expectations, 48 students (96%) answered affirmatively. Students’ perceptions of how knowledge of the Four Tendencies could impact their sales call role plays demonstrate that students do see value in the learning and how it can benefit their role plays. As indicated in Table 2 (Appendix) students predict that applying the Four Tendencies would increase their confidence, the flow of conversation, their ability to make the ask/close, the actual outcome of the sales call, and their grade. Additionally, students felt strongly ($M = 4.36$) that knowing the Tendency of their prospective buyer would help them engage better together during the role play.

Anecdotally, conversations with these students uncovered that they greatly enjoyed the Four Tendencies lesson and found the assessment to be very eye-opening with respect to their everyday life. Understanding the different ways in which people respond to expectations is illuminating for marketing students, especially as many of them are regularly engaged in team projects and trying to manage expectations of their peers.

Challenges Related to the Innovation

While this innovation is straightforward for faculty to implement into a sales class, the biggest challenge is making sure students clearly understand all Four Tendencies and the differences between them before applying the tendencies to closing practices. Instructors should include many examples from students’ everyday lives (e.g., how they feel when their parents ask them to complete a task, how they interact with classmates in group projects, how well they follow personal goals for healthy eating or getting up early) to help them understand the nuances among the Four Tendencies. They will inherently understand their own tendency well, but it is important to allow time and encourage the class to share rich examples of perspectives from each of the Four Tendencies before asking them to close. Making the ask is a skill students struggle

the most with already, since it requires them to risk rejection, so building their confidence and familiarity with the Four Tendencies is critical in this step. Without this foundation, students may struggle to form closing questions for a fictitious buyer of a different tendency. Once a clear understanding exists, and a dialogue about the benefits and challenges of each tendency takes place, students should be able to do this.

IMPLEMENTATION INTO THE CLASSROOM

Implementing the Four Tendencies into the marketing curriculum would be impactful and simple to integrate. Since marketing depends on the engagement between two entities, the inclusion of exploration into the how one responds to expectations from us and others, so that we can more effectively achieve our aims, is imperative to future success within the discipline. The use of the quiz on Rubin's website (2017) to discover one's tendency, along with the short YouTube video that explains the tendencies, gives a fun and engaging further explanation of the topic that would be universal to any type of marketing curriculum such as advertising, content marketing, and consumer behavior. If introduced in an introductory marketing course, the Four Tendencies could then be a common language throughout many future marketing courses.

The Four Tendencies can be applied specifically to many marketing courses. This paper proposes how to integrate the Four Tendencies to aid closing in sales, but the Four Tendencies can also be used in any Marketing class that uses a teamwork approach to student assignments. For example, in a Marketing Research course that has students work in teams to collect primary data to uncover consumer insights, the Four Tendencies could be taught and applied in order to increase team cohesion, thus raising the quality of the work produced by the team. As many marketing courses incorporate group and team projects (including many client-based projects), the Four Tendencies can be a terrific tool for setting expectations, timelines, and goals in group projects and for group members understanding how to best hold each other accountable.

CONCLUSION

The Four Tendencies provide students with an additional tool they can use to strengthen relationships, meet goals, and better understand what motivates other people to action. These skills are critical for young marketing professionals to develop early on in their career. Additionally, those who are in sales will benefit by utilizing knowledge of the Four Tendencies to persuade and motivate others to act. As evidenced by feedback in this exercise, students find the Four Tendencies to be relevant and interesting, and quantitative evidence supports that they perceive it will increase not only their outcomes in closing, but also their confidence.

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Appendix

Table 1. Mean Score of Students' Perceptions of Role Play Preparation

| Item | Mean |
|---|------|
| How much do you like the idea of completing your sales role play in general?* | 3.30 |
| How much do you like working toward your sales role play?* | 3.52 |
| How well has your sales role play prep gone?*** | 3.02 |
| Sample Size | 50 |

* Measured on a 1-5 scale where 1 = Dislike A Great Deal and 5 = Like A Great Deal

** Measured on a 1-5 scale where 1 = Not Well At All and 5 = Extremely Well

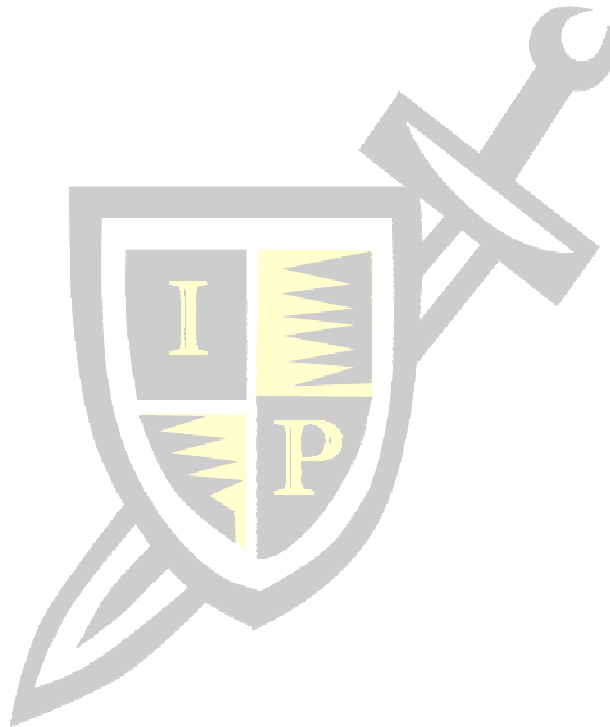
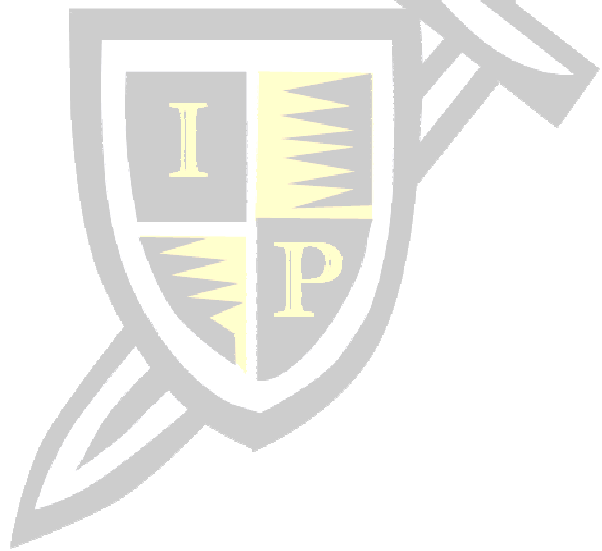


Table 2. Student Perceptions of Potential Impact on Sales Role Play

| Item* | Mean |
|--|------|
| How do you predict that applying the Four Tendencies would impact the following outcomes related to your sales call role play? | |
| Confidence | 3.86 |
| Flow of Conversation | 3.84 |
| Ability to Make the Ask/Close | 3.96 |
| Outcome (Buyer Says "Yes") | 3.72 |
| Grade | 3.82 |
| Do you think knowing the Tendency of your buyer (prospect) in the role play would help you engage better together? | |
| | 4.36 |
| Sample Size | 50 |

* Measured on a 1-5 scale where 1 = Definitely Will Not and 5 = Definitely Will



Appendix: The Four Tendencies Class Activity

Instructions

Using the six categories of closing statements from class and the Four Tendencies overviews provided below, decide which category of close might be best to use with each of the tendencies. Then, in the table provided, write a closing question that would be appropriate for your buyer if they had each of the Four Tendencies. Remember to base your statements on your role as a seller for the company.

Four Tendencies Overviews

Upholder

How to Identify

- Right on time for a discovery call
- Solo activities that require motivation in their free time (running, golf, ceramics, writing)
- Consistently respond with the info they say they will, and in a timely manner

How to Motivate Them to Action

- Know what they value, and honor that
- Be punctual and prepared, don't cancel or reschedule
- Know the details, and be diligent about information (judgment if you seem disorganized)
- Appeal to sense of responsibility: "If you are on board with this, I know this will happen."

Obliger

How to Identify (the Most Common Tendency)

- Accept outside rules, but doesn't create or adopt self-imposed rules
- Accountability is important (polar opposite of rebel)
- Highly social; love to attend gatherings and events
- If late they will apologize, but they were probably giving attention to someone they thought needed it

How to Motivate Them to Action

- Make sure they are all in. Call them out gently on hesitations and try to solidify their commitments
- Create tangible action steps
- If they are not the decision maker, make sure they are well-versed in the need and benefits so they can confidently communicate with the decision maker (because in addition to wanting to please you, they'll want to please that person too)

Questioner

How to Identify

- Information junkies; motivated by logic and reason
- Do they read instruction manuals? Go to trivia night? Provide a lot of context and details?
- Ask a lot of questions

How to Motivate Them to Action

- Give them a sense of logic and reason; make the next step make sense to them
- Don't push them; logic will drive them, but not emotional pulls or surface-level asks

Rebel

How to Identify

- Flouts rules, resists control, and wants to do the exact opposite of what the expectation is
- Often are late and do not apologize
- Spontaneous and rarely a part of an organization that has standard meeting times

How to Motivate Them to Action

- Give them a choice; put the ball in their court, let them feel in control
- Do not schedule; go for a seemingly random meeting (“I know this isn’t a lot of notice, but any chance you’re up for a demo right now?”)
- Acknowledge their rebellious nature, they actually generally appreciate that

What “types” of closes do you think are best-fitting for each Tendency? Why? Provide an explanation and then write an example closing statement/question.

OBLIGER

| | |
|---------------------------------|---------------------------------|
| Type: Why: Example Close: | Type: Why: Example Close: |
|---------------------------------|---------------------------------|

QUESTIONER

| | |
|---------------------------------|---------------------------------|
| Type: Why: Example Close: | Type: Why: Example Close: |
|---------------------------------|---------------------------------|

REBEL

| | |
|---------------------------------|---------------------------------|
| Type: Why: Example Close: | Type: Why: Example Close: |
|---------------------------------|---------------------------------|

UPHOLDER

| | |
|---------------------------------|---------------------------------|
| Type: Why: Example Close: | Type: Why: Example Close: |
|---------------------------------|---------------------------------|

