



# JOHN ALLEN

**Examiner**  
DISC Type : cs

**Vice President Account Executive at HealthEquity**  
Brentwood, Tennessee, United States

## Overview

John has no verified overview

### 👉 Personality Overview

**Status Quo Seeker**      **Tough To Convince**      **Process Oriented**

They are thorough and always follow a systematic approach. They tend to have clarity about their needs and constraints, and are unlikely to over-promise. Being observant comes to them naturally.

### 👉 Topics They Care About

John has no verified topics they care about

## Media Appearances

John has no verified media appearances

## Work History

- 9-2022  
Vice President Account Executive at HealthEquity
- 10-2014 - 1-2022  
VP, Account Executive - Health Savings Accounts at Fidelity Investments
- 2-2008 - 10-2014  
VP, Solution Architect at Fidelity Investments
- 2-2005 - 2-2008  
VP Service Delivery Leader at Fidelity Investments
- 9-1998 - 9-2000  
Director, Health and Welfare Client Services at Fidelity Investments

## Education

- 1985 - 1989  
Education details unavailable from Cornell University
- 1992 - 1997  
Master of Business Administration (MBA) from Boston University

## More Information

Social Presence :



Prographics :

Exp : **24** Location : **Brentwood, Tennessee, United States** Job Level : **Leadership**

Designation : **Vice President Account Executive at HealthEquity**

## Insights For Selling To John

### 👉 During A Call Or A Meeting

#### DO's

- Expect them to be slow and cautious, encourage them to ask more questions
- First of all, focus on building their confidence by sharing examples, case studies etc.
- Spend time addressing concerns around risk and change, they will have them even if they don't express them

#### DONT's

- Don't push them too hard to make fast decisions, give them time
- Don't be very accepting if that is your natural style, stay firm
- Avoid getting into storytelling mode, especially when they ask specific questions

## 👉 When Cold Calling

### Insights

**Pattern Interrupt:** Speaking in a slightly hesitant manner, and seeking their permission at the start through a negation can get you a chance.

**Pace:** Speak slightly fast, especially if you tend to be calm and confident. Sound like a 'knows their domain' person.

**Tone:** Keep your tone slightly apprehensive, as if you are a little unsure about calling them.

**Tactics To Win:** Use of negations, giving full information

**Mistakes To Avoid:** Use of superlatives, overusing social proof

**Making The Ask:** Use negations, it is extra effective with them. It gives them a chance to say no, they like doing that.

**Subconscious Driver:** They believe they know a lot, so it needs to make sense as well as make them curious. They need to think that it is something worth investigation.

### Script

**Greeting:** Hi John, this is [user\_fname] at [user\_companynamewordstwowords].

**Opener:** You probably don't want to be on this cold call, would it be a problem if I asked for 30 seconds of your time?

**Introduction:** My company has leveraged 30+ years of research to build an AI that can predict anyone's personality, behavior and decision-making style before you even spend a minute with them.

**Ask:** Companies like [abc], [xyz] have been able to move [KPI1] by X% and [KPI2] by Y%. Would it be too much to put 15 minutes on your calendar to share why this could be high ROI for you?

**Close:** Can I suggest [time1] on [date1]? Or would you prefer any other slots? And [prospect\_email] would be the right email ID for you?

## 👉 When Writing An Email

**Subject:** Precise

*Example: Measurable results', '6.2% more sales' etc.*

**Salutation:** Yes (Something formal)

*Example: Use 'Hi' (along with the first name)*

**Greeting:** Yes (Say something formal/usual)

*Example: Use standard lines, like 'I hope that you are doing well' etc.*

**Emojis/GIFs:**

**Bullet Points:** Recommended

**Closing Line:** Logically summarize/ask

*Example: Something like 'If these points make it clear, shall we speak tomorrow at 11am?'*

**Complimentary Close:** Formal

*Example: Something simple like 'Thanks', 'Regards' etc.*

**Tone of Words:** Objective, informational

**Overall Messaging:** Focused on removing doubts

**Length of Mail:** Medium

*Example: Ideally upto 120-130 words*

## 👉 While Negotiating & Closing

The secret to closing fast with John is

- *Adoption by others is very important to them, followed by confidence in ROI.*

Will you ever get a clear answer from John

- *They don't say no often, they push out the decisions or keep going around in circles.*

---

## Insights For Deal Planning

How Fast (Or Slow) Will John Move?

- *They don't like to hasten, so their speed of decision-making may be slow.*

Can John Take Some Risk Or Not?

- *They have little willingness to take risks, and prefer making calculated decisions.*

---

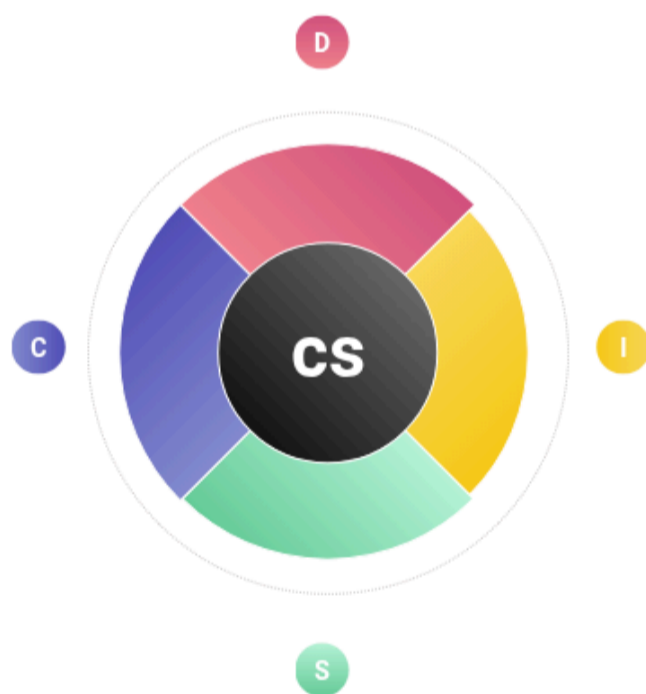
## You And John

### Personality Compatibility

Not enough data to show compatibility comparison

---

## DISC Profile : John's Key Traits



### CALCULATIVENESS

Calculativeness(C) reflects the degree to which a person is likely to be cautious, systematic and analytical. Those scoring high tend to emphasise quality and accuracy, enjoy showing off their expertise or challenging assumptions but can sometimes overanalyze things and be overcritical.

### STEADINESS

Steadiness(S) reflects the degree to which a person is likely to focus on cooperation, support and taking everyone along. Those scoring high tend to be consistent and calm, are excited about the opportunity to collaborate and partner and could sometimes be indecisive or overly accommodating.