



LISA HEFTER

Wildcard
DISC Type : sci

President, Chief Operating Officer at Peoples Bank
Bellingham, Washington, United States

Overview

Lisa has no verified overview

👉 Personality Overview

Requires Proof **Friendly But Slow** **Curious But Skeptical**

They typically tend to be late adopters even when they seem friendly and excited about what you have to sell. They are unlikely to ever become strong champions even when the conversations are going well; you should focus on cultivating other champions. They are often friendly and nice, but can sometimes surprise you with their piercing questions.

👉 Topics They Care About

Lisa has no verified topics they care about

Media Appearances

Lisa has no verified media appearances

Work History

- 1-2023
President, Chief Operating Officer at Peoples Bank
- 6-2021 - 1-2023
Executive Vice President, Chief Operating Officer at Peoples Bank
- 10-2020
Board Member at Peoples Bank

Education

- 2007 - 2009
Education details unavailable from Pacific Coast Banking School
- 1989 - 1992
BS Business from Central Washington University

More Information

Social Presence :



Prographics :

Exp : 5 Location : **Bellingham, Washington, United States** Job Level : **Leadership**

Designation : **President, Chief Operating Officer at Peoples Bank**

Insights For Selling To Lisa

👉 During A Call Or A Meeting

DO's

- Persuade objectively how your product will help them achieve their goals
- Build rapport, it will come handy to handle hard questions later
- Help them understand the risk aspect fully while inspiring confidence

DONT's

- Do not sound overly eager, modulate your energy levels especially if you are generally enthusiastic
- Avoid phrases like 'trust me', 'you will just love it' etc.
- Don't ask them to move fast, let them take their time and digest all the information

👉 When Cold Calling

Insights

Pattern Interrupt: A polite and formal approach, that doesn't sound over-friendly or too aggressive makes it hard for them to say no to you.

Pace: Slow down a little bit, especially if you are fast usually. Sound like a 'calming break from the day' person.

Tone: Keep your tone calm and soothing, as if you are giving a stranger advice on a critical matter.

Tactics To Win: Use of social proof, FOMO, repeating their name

Mistakes To Avoid: Strong words, over-confidence, informal language

Making The Ask: Formally, respectfully request their time. They find it quite hard to say no (Compared to Dominant or Calculative types for eg)

Subconscious Driver: They are change-averse by default. Hence a FOMO laden pitch can jolt them into action.

Script

Greeting: Good morning/evening Lisa, how are you? This is [user_fname] at [user_companynamewordstwowords].

Opener: You are of course busy, would it be ok for me to take 30 seconds of your time to explain why I have called today?

Introduction: My company has built an AI that predicts prospect's personality and behavior so that you can start building trust from the very first second that you meet them.

Ask: Lisa, companies like [abc], [xyz] have found it to be invaluable and adopted it already, it would be ok perhaps to put 15 minutes on your calendar to share why this could be valuable for you.

Close: If you are a morning person, then how does Tues or Wed look at [time]? And your email ID is [prospect_email]?

👉 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 Lisa is

- *Clear proof of product value matters to them, followed by others' testimonials and rapport.*

Will you ever get a clear answer from Lisa

- *They are likely to give you a clear answer without taking you around in circles. However, if you share a good relationship, they might not be so forthcoming.*

Insights For Deal Planning

How Fast (Or Slow) Will Lisa Move?

- *They like to perform full analysis and can take time to make any decision.*

Can Lisa Take Some Risk Or Not?

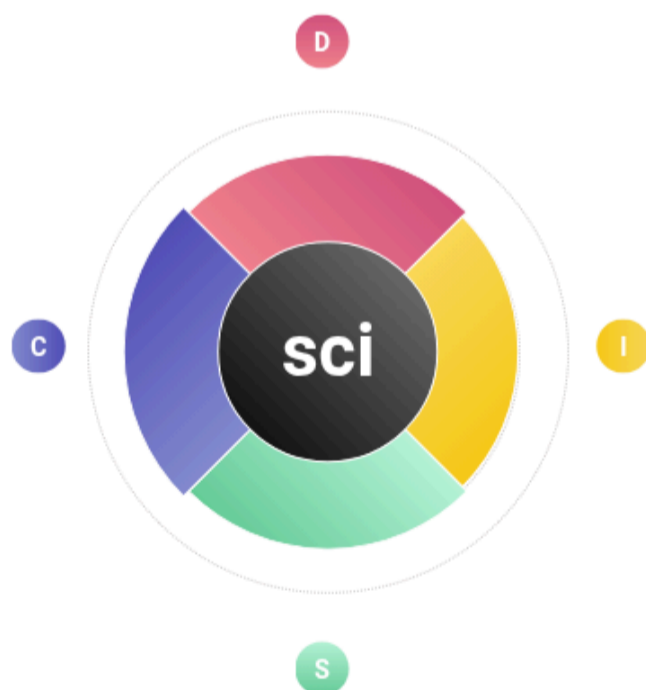
- *They weigh all decisions systematically and are unlikely to take many risks.*

You And Lisa

Personality Compatibility

Not enough data to show compatibility comparison

DISC Profile : Lisa's Key Traits



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.

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.

INFLUENCE

Influence(I) reflects the degree to which a person prefers to work by influencing or persuading others. Those scoring high tend to be people oriented, are motivated by social recognition and building relationships and can be described as warm and enthusiastic in general.