



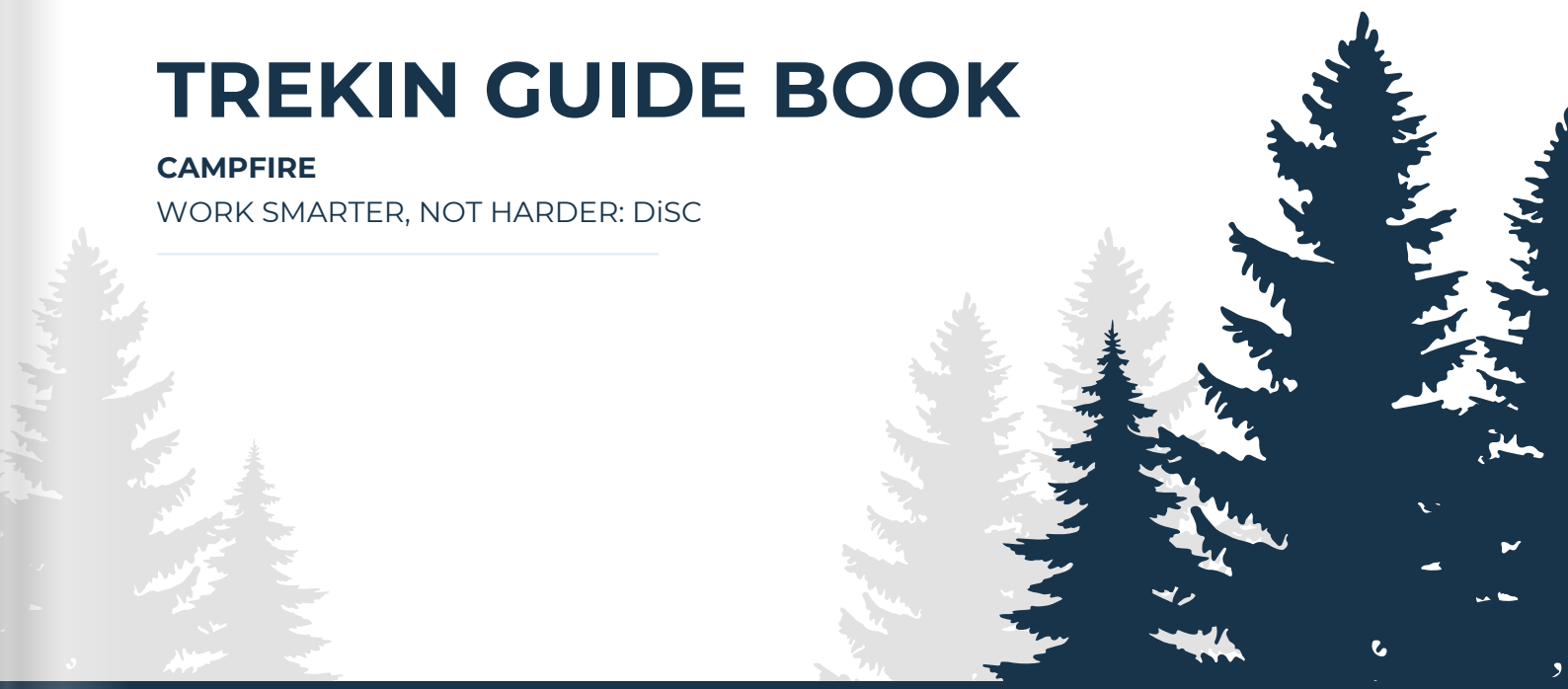
**TREK INSTITUTE**  
A BASE CAMP CO-OP FOR SUCCESS

# TREKIN GUIDE BOOK

**CAMPFIRE**

WORK SMARTER, NOT HARDER: DiSC

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# THE POWER OF TEAM DYNAMICS

*DRIVING SUCCESS BEGINS WITH PEOPLE*

In an advisory business, success isn't just about expertise, but how well a team functions together. Many teams struggle not because of a lack of talent, but because of misalignment in communication, collaboration, and expectations. When individuals approach problem-solving and decision-making differently, it can lead to frustration, inefficiency, and unnecessary tension.

To unlock true efficiency, teams must not only recognize but also embrace these differences. When leveraged correctly, varying behavioral styles can enhance team synergy, decision-making, and overall productivity. A team that understands how to communicate effectively—adapting to each member's strengths—creates an environment where ideas flow freely, decisions are made efficiently, and collaboration feels natural instead of forced.

The goal isn't to force a one-size-fits-all approach but rather to recognize and leverage different working styles in a way that enhances collaboration. When each team member understands their own tendencies and those of their colleagues, they can adjust their communication and work habits to create a seamless, highly functional team dynamic.





## Enhancing and Improving **TEAM DYNAMICS**

Different personalities process information, make decisions, and approach collaboration in unique ways. Without an understanding of these differences, team interactions can become frustrating, inefficient, or even combative. This is where the DISC behavioral framework provides valuable insight.

DISC categorizes behavioral tendencies into four core styles, each with distinct strengths and challenges. Understanding these styles can enhance communication, improve workflows, and create a more cohesive team dynamic.

### **D – Decisive, Direct (The “Driver”)**

D-styles are results-driven, fast-moving individuals who prioritize efficiency and outcomes over process and discussion. They thrive in high-pressure environments where quick decision-making and assertiveness are valued. These individuals are excellent at taking initiative, setting goals, and pushing projects forward, but they may struggle with patience, collaboration, and considering alternative perspectives if they perceive them as slowing down progress.

- **Strengths:** Strong leadership, decisive problem solving, thrives under pressure
- **Challenges:** May be perceived as aggressive, impatient, or dismissive.
- **Best Ways to Engage:** Be direct, concise, and results-focused. Avoid unnecessary detail or slow decision-making processes.

### **I – Energetic, Social (The “Influencer”)**

I-styles are highly social, energetic, and thrive on collaboration, creativity, and big-picture thinking. They bring enthusiasm, motivation, and strong interpersonal skills to the team, often excelling in roles that involve networking, engagement, and brainstorming. However, they may struggle with follow-through, structure, and focusing on details, preferring high-energy interactions over deep analysis or rigid processes.

- **Strengths:** Charismatic, great at generating ideas, strong people skills.
- **Challenges:** Can be seen as scattered, easily distracted, or overly optimistic about ideas without execution plans.
- **Best Ways to Engage:** Maintain enthusiasm, provide structure for execution, and recognize contributions to keep motivation high.

### **S – Supportive, Steady (The “Stabilizer”)**

S-styles are dependable, thoughtful, and highly team-oriented, valuing stability, consistency, and strong relationships. They excel in roles that require patience, cooperation, and trust-building. While their reliability is a major asset, they may resist change and avoid conflict, preferring harmony over confrontation. They work best in environments where expectations are clear, and they are given time to process change.

- **Strengths:** Loyal, great team players, excellent at maintaining relationships.
- **Challenges:** May struggle with change, avoid confrontation, or hesitate to make quick decisions.
- **Best Ways to Engage:** Provide reassurance, allow time for processing changes, and emphasize teamwork to help them feel secure.

### **C – Cautious, Analytical (The “Strategist”)**

C-styles are structured, detail-oriented, and process-driven, excelling at analyzing data, solving complex problems, and ensuring accuracy. They are highly logical and prefer to gather all relevant information before making decisions. However, their preference for analysis may slow progress in fast-moving environments, and they may struggle with decision-making under uncertainty or pressure.

- **Strengths:** Logical, detail-focused, excels in precision and accuracy.
- **Challenges:** Can be overly critical, perfectionist, or hesitant to take action without complete information.
- **Best Ways to Engage:** Provide clear logic, data, and structure; avoid vague instructions or rushed decision-making.



## CASE STUDY

### A Project at Risk



The Parktown team was given a high-stakes client project requiring a combination of strategic planning, data analysis, and strong client communication. They were tasked with developing a financial planning presentation for one of the firm's biggest clients. Each person approached the project differently, creating early friction that threatened deadlines and team morale.

#### Meet the Team:



D-Style

**Mark**, an associate advisor, pushed for immediate decisions, wanting quick execution rather than lengthy discussions. He became frustrated when others didn't move fast enough.



I-Style

**Samantha**, a marketing associate, focused on the storytelling aspect, wanting to create a client-focused experience. However, she struggled with structure, making it difficult to finalize key points relevant to the client.



C-Style

**Emily**, a paraplanner and analyst, resisted Mark's urgency insisting that they needed to collect all relevant data first. She feared that making quick decisions on this presentation would create major flaws.



S-Style

**David**, a client service associate, wanted everyone to feel heard and aligned, slowing down decision making while trying to mediate between Mark's speed and Emily's need for accuracy.

As the project deadline approached, the team had not finalized key deliverables, and frustration grew. Meetings became tense, and collaboration started to feel like an obstacle rather than a solution.

#### The Turning Point

Realizing the team was at risk of missing their deadline and disappointing the client, the senior advisor/owner stepped in and suggested a shift in approach. Rather than allowing their differences to cause conflict, they needed to lean into their strengths and create a more structured, complementary workflow. **Mark**, as the results-driven leader of the project, took responsibility for setting firm deadlines and keeping execution on track, while agreeing to slow down just enough to ensure quality. **Emily**, with her analytical mindset, focused on structuring the financial analysis and refining recommendations, ensuring accuracy and thorough evaluation before finalizing. **Samantha**, the natural communicator, took charge of the client-facing narrative, ensuring the final presentation was both engaging and accessible. Meanwhile, **David** acted as the bridge between conflicting styles, facilitating meetings, ensuring alignment, and helping Mark and Emily find a balance between speed and precision. By embracing their roles in a way that played to their strengths, the team transformed a struggling project into a seamless, well-executed collaboration.

#### The Outcome

With each person playing to their strengths, the team not only met their deadline but delivered a highly effective, well-received presentation. The client appreciated both the clarity and strategic insight of the analysis, while also engaging with the dynamic, accessible way the material was presented.

By understanding that different styles are not obstacles but assets, the team turned potential disaster into success. Their ability to adapt, adjust communication, and align roles with strengths ultimately led to a more efficient, collaborative, and high-performing team.

#### Key Takeaways

**Leverage strengths, don't fight differences.** When teams stop resisting different working styles and start using them strategically, productivity improves.

**Communication is key.** Recognizing when friction is due to style differences rather than actual disagreement can prevent conflict from escalating.

**Adaptability ensures success.** When each person adjusts slightly rather than demanding the entire team operate their way, execution becomes smoother.



## Applying DiSC to Improve **TEAM EFFICIENCY & PERSONAL GROWTH**

Understanding team dynamics is only valuable if it leads to practical improvements in collaboration and productivity. Applying DISC insights allows teams to structure workflows that maximize efficiency while ensuring that each individual is contributing in a way that aligns with their strengths. It also helps individuals assess their own impact on the team, identifying where they enhance efficiency and where they may create friction.

### Tailoring Workflows to Behavioral Strengths

**D-styles** streamline planning processes and can manage overall concepts, coordinating important aspects of the plan together.

- Use this style in conjunction with the others to keep things on track.
- Give them autonomy and direct communication.
- Avoid micromanaging but provide clear expectations.

**I-styles** are great at making the client feel welcomed. Their enthusiasm helps establish rapport and build trust.

- Work this style into the key touchpoints where relationships are top-priority.
- Engage them in social interactions.
- Provide regular feedback and encouragement.

### Personal Reflection – Understanding Your Role

Applying DISC doesn't just benefit the team as a whole—it also helps individuals understand their own strengths and areas for improvement.

#### Ask yourself...

- How do I naturally contribute to the team's success?
- Where might my working style create friction with others?
- How can I adjust my approach to collaborate more effectively?

Developing this level of self-awareness allows team members to recognize their impact on the group, fostering stronger collaboration and minimizing miscommunication. Emotional intelligence plays a crucial role in team efficiency. It's critical to not only understand how others operate but also adjust one's own approach to align with team dynamics. By refining communication and work habits in a way that complements others' strengths, individuals contribute to a more adaptive, effective, and well-balanced team environment.

**S-styles** ensure things are structured and the experience for the client is steady. They provide the voice of reason and reliability, making sure everyone has what they need.

- Involve them in touchpoints where the client needs to feel reassured and supported, such as post-meeting follow-ups or client-check in calls.
- Encourage them to speak up in decision-making or providing ideas.

**C-styles** take charge of data, analyzing things in a way that other styles may not see at first.

- Involve this style in places where accuracy and financial insight is key.
- Give them time to process information and provide details in advance
- Avoid pressuring them into rushed decisions.

### Key Takeaways

**Structure workflows around behavioral strengths** to maximize efficiency and reduce friction.

**Leaders should adapt their approach** based on team members' styles to ensure optimal engagement.

**Encouraging personal reflection** helps individuals take responsibility for their impact on the team's overall success.

By aligning team workflows, leadership approaches, and personal awareness with behavioral strengths, teams can unlock higher productivity, improve collaboration, and foster a stronger team culture.

After this episode, your team will participate in a DISC session to build on team dynamics.

