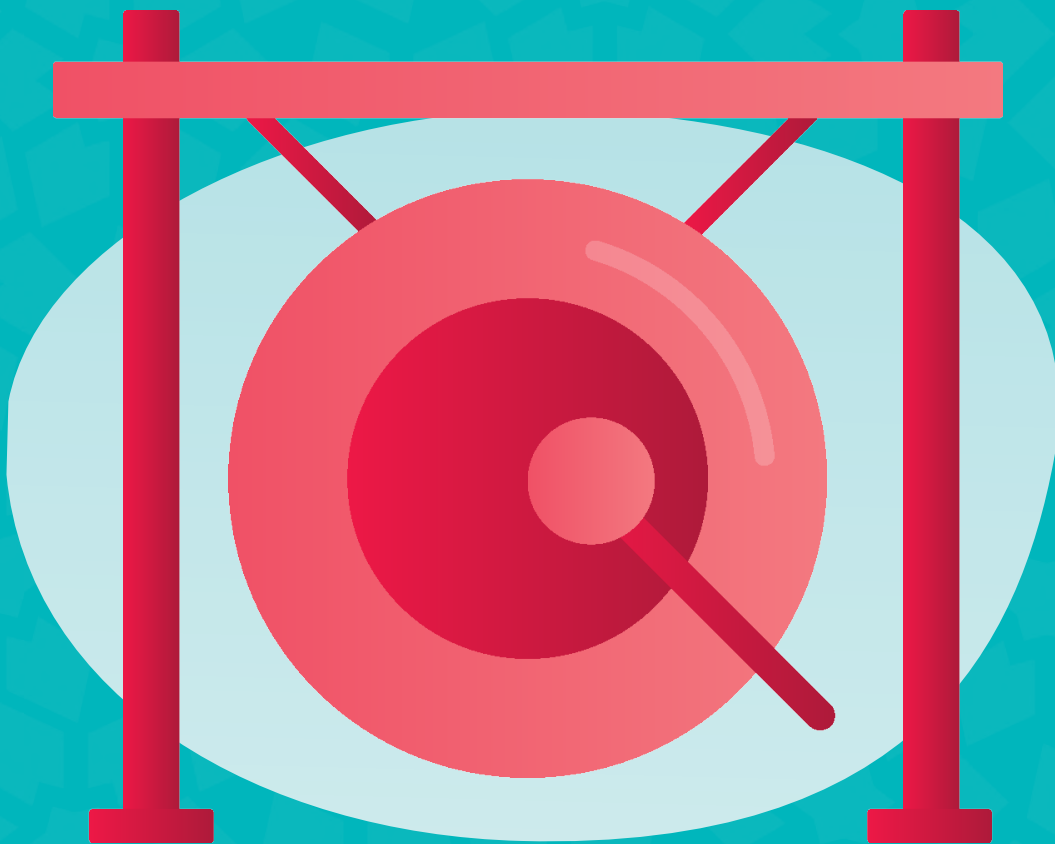


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USING PERSONALITY AI FOR

# SALES

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*Win over prospects and close deals faster*

By Drew D'Agostino, CEO of **Crystal** 

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*Intro* \_\_\_\_\_

# How Salespeople use Personality

# HOW SALESPEOPLE USE PERSONALITY

As the world has become hyper-connected and saturated with marketing messages, modern sales professionals have started to encounter some uniquely difficult challenges:

There are many voices to compete with and more noise to break through, so buyers can afford to be very selective with their attention. Prospects are much more skeptical of cold outreach than ever, resulting in low response rates.

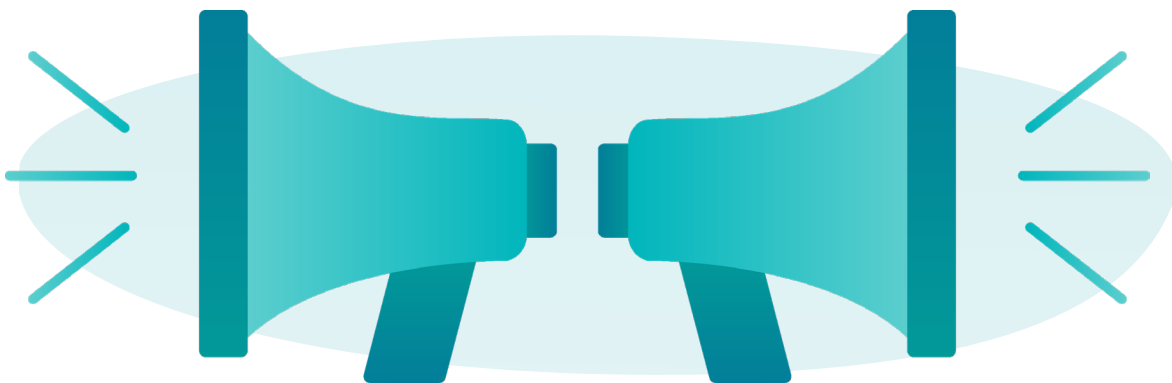
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*Customers have grown accustomed to a highly personalized and efficient buying experience, and thus, their expectations are far higher for any kind of sales interaction.*

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When your primary job is to quickly earn trust from people who want to trust less and less of the messages thrown their way every day, it may feel like you're fighting an uphill battle on a hill that is only getting steeper. Which is absolutely the case if you play by the standard sales tactics of today.

This environment can be confusing and frustrating, so many organizations and salespeople respond with brute force. They play the numbers game, pumping their prospects inboxes with a steady stream of boilerplate emails and meeting requests or calling and delivering the same generic pitch to everyone. In their minds, everything is a numbers game and success is a byproduct of how large your contact list is. But as they hammer away at the list, their prospects only become more agitated and less responsive, and the only solution is to get a new, bigger list.



While the vast majority of sales organizations choose this high-volume, low-touch strategy, they have created a massive opportunity for those who take the opposite approach; one focused on quality conversations, building trust, and professional empathy. This thriving minority knows that prospects respond most eagerly when they feel understood, and they know the most important parts of human connection cannot be automated.

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*They view outreach not as a numbers game, but a relational one, where they can win by making their pitch more personal, more authentic, and more relevant than their competition.*

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At Crystal, we have developed tools to help this second type of sales professional. Personalization can be a cumbersome, inefficient process (hence why most salespeople don't do it), but a new technology called Personality AI has unlocked an entirely unutilized and untapped layer of data - behavioral tendencies, motivations, interaction style, etc - that can be used to quickly create more effective messages.

Personality is one of the more important factors in professional communication, but it is less tangible than other information, so it is easily ignored. However, it often contains the answers to tough questions like, "why do some prospects respond to this email while most ignore it?" or "why am I spending so much time giving demos to prospects who seem so excited at first, but never follow through with a purchase?"

In order to use personality, you first need to understand it. This next section will give you the necessary context.



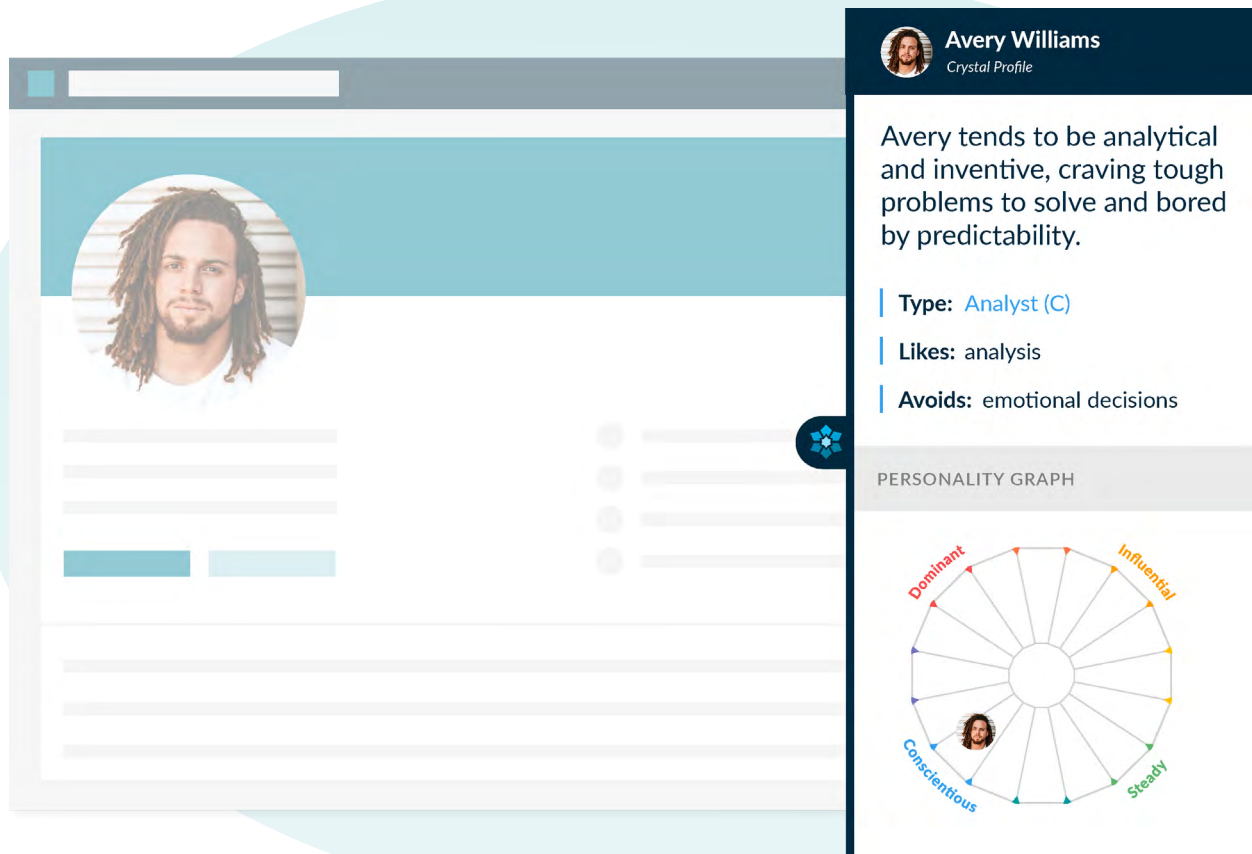
*Section 1* ———

# Understanding personality

# UNDERSTANDING PERSONALITY

Historically, the only way you would be able to fully understand someone's personality is by either getting to know them really well, which takes lots of time and emotional intelligence, or having them take a personality test. Both of these approaches require that you have an established relationship with the person, which doesn't tend to work in the world of outreach communication, since we are often trying to connect with new people who we have never spoken with before.

Thankfully, there is a new technology that unlocks another way to learn about someone's personality without an assessment - Personality AI. We wrote about this in detail in another ebook titled, [Personality AI](#) (which you can download for free). This new technology analyzes publicly available information on websites like LinkedIn to predict someone's personality, using artificial intelligence and machine learning. We built our product, Crystal, to harness Personality AI and enable anyone to identify personalities online to improve their communication and build stronger relationships, all based on the core principle of empathy.



The image shows a screenshot of a user profile on the Crystal platform. The profile is for Avery Williams, identified as a 'Crystal Profile'. The profile includes a circular profile picture of a man with dreadlocks. To the right of the profile picture, there is a dark blue header with the name 'Avery Williams' and 'Crystal Profile' below it. Below the header, there is a text box describing Avery's personality: 'Avery tends to be analytical and inventive, craving tough problems to solve and bored by predictability.' Below this text, there are three lines of information: 'Type: Analyst (C)', 'Likes: analysis', and 'Avoids: emotional decisions'. Below this information, there is a section titled 'PERSONALITY GRAPH' which contains a circular graph with 12 segments. The segments are labeled with personality traits: 'Dominant' (red), 'Influential' (orange), 'Steady' (green), and 'Conscientious' (blue). A small circular icon with a blue starburst is located to the left of the graph.

**Avery Williams**  
Crystal Profile

Avery tends to be analytical and inventive, craving tough problems to solve and bored by predictability.

**Type:** Analyst (C)  
**Likes:** analysis  
**Avoids:** emotional decisions

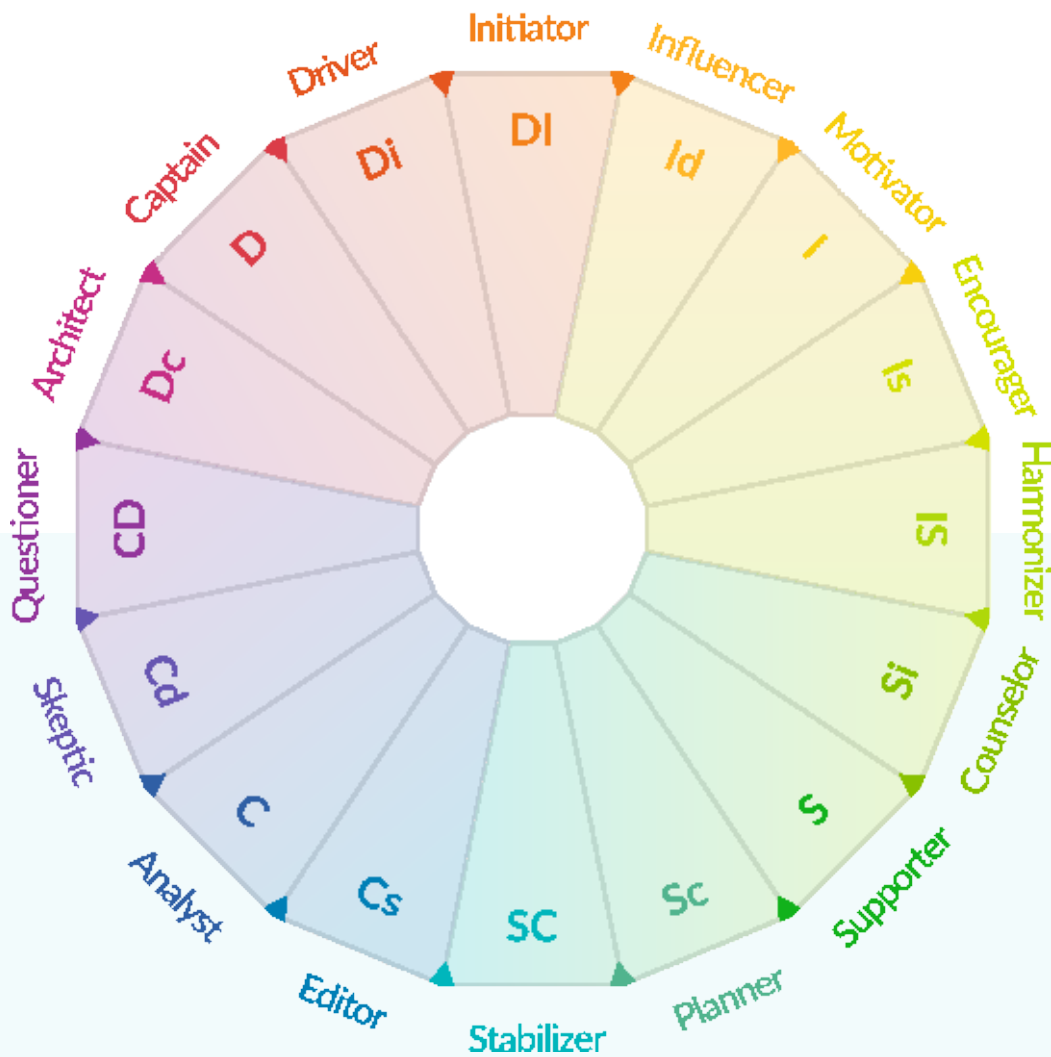
PERSONALITY GRAPH

Dominant, Influential, Steady, Conscientious



Without getting too technical, when Crystal's AI predicts personality, it uses a framework called DISC to classify personalities into a few categories that we refer to as D (dominance), I (influence), S (steadiness), and C (conscientiousness). Each of us has a primary DISC type in one of these categories and sometimes a secondary DISC type in another. To keep things simple, we separate these into easy-to-remember labels called Archetypes.

You can see them all on this graphic called the Personality Map:





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*Below is a breakdown of common personality traits within each of the categories in DISC.*

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### **D Personality Types:** *Captains, Drivers, Initiators, Architects*



- Motivated by control over the future and personal authority
- Tend to prefer instant, concrete results and having an advantage over competition
- Communicate clearly and succinctly

### **I Personality Types:** *Influencer, Motivator, Encourager, Harmonizer*



- Motivated by innovative, unique, creative ideas and excited by the future
- Tend to prefer building new relationships and experiences
- Communicate in a casual, expressive way

### **S Personality Types:** *Counselor, Supporter, Planner, Stabilizer*



- Motivated by peace, safety, and others' wellbeing
- Tend to prefer security, reliability and trust
- Communicate in a friendly and genuine way

### **C Personality Types:** *Editor, Analyst, Skeptic, Questioner*



- Motivated by logic, information, and problem solving
- Tend to prefer accurate information and quality solutions (quality over quantity)
- Communicate in a business-like, fact-based way

With an accurate understanding of personality differences, you can better understand what your customers want, why they want it, and how they want to communicate in the buying process. Sales professionals who use this information to adjust their pitch, process, and overall strategy can escape the never-ending numbers game, accelerate their pipelines, and rediscover the rich, enjoyable personal connections that put them on their career path in the first place.

*Section 2* \_\_\_\_\_

## **Make a good impression**

## Make a good impression

Introducing yourself and your product well from the start is one of the most important aspects of sales. Leaving a positive impression on a prospect can mean the difference between a significant sale and a waste of time and resources.



### D TYPE

When interacting with a straight-forward **D-type** personality, focus on being concise and confident. Be sure to maintain eye contact and get to the point of the conversation, the pitch. Avoid small-talk.



### I TYPE

If your prospect is a more optimistic, creative **I-types**, they likely appreciate people who share interesting stories, while maintaining a positive demeanor. Engage them in small-talk before getting into any details.



### S TYPE

Thoughtful, patient **S-types** need to feel comfortable around new people. Help them relax by asking them how their day is going and respecting their schedule. Avoid being overly intense or pushy in your tone.



### C TYPE

Prospects who are reserved, focused C-types prefer knowing what to expect when meeting with someone new. Be intentional about showing respect for their time and demonstrating your expertise. Avoid asking irrelevant personal questions.

*By making a good impression through effective, attentive communication, you'll start your pitch off on the right foot.*



*Section 3* —————

# **Improve your pitch**

## Improve your pitch

Just as creating a good first impression can matter to establishing a longer-term, working relationship, making an effort to cater your pitch to different personalities can mean the difference between a missed opportunity and an important sale. You can land an important customer by making sure to talk about your company in a way that appeals to them individually. There are a few, concrete ways to improve the heart of your pitch for each personality type.



### D TYPE

When pitching to more dominant, assertive **D-types**, it's important to focus on conveying the competitive advantages of an offer. Make sure to keep your pitch clear and concise, while reacting quickly to any feedback.



### I TYPE

Prospects who are energetic, enthusiastic **I-types** appreciate more expressive, light-hearted conversations. They can be fun to do a demo for because of their frequent positivity. They're likely to engage with ideas that are new and innovative. Focus on building excitement about your product and the deeper meaning behind it before getting into any financial discussion.



### S TYPE

If your prospect is a supportive, caring **S-type**, they usually appreciate when you highlight security and stability in a pitch. It's important to establish a personal connection with them by asking about them, sharing personal stories, and encouraging them to offer feedback. Avoid pushing them to make a quick decision.



### C TYPE

Inquisitive, data-driven **C-types** appreciate a thorough, evidence-supported discussion. Be sure to let them know what to expect beforehand and honor their scheduled time. Use specific, clear language and be prepared to answer their questions.

*Salespeople who understand their prospects can easily gear their pitch toward their prospects' needs to make it more convincing, effective, and mutually beneficial.*



*Section 4* —————

# Present Pricing

## Present Pricing

Discussing the financial aspects of a pitch can seem daunting: discuss it too soon and the prospect might think you are too pushy, but bring it up too late and they may find you unfocused. Recognizing how different personalities respond to this tricky subject can help you find the perfect way to address it with each unique prospect.



### D TYPE

Direct **D-types** usually consider pricing to be high-priority when considering a product or service. They tend to prefer discussing it early on in the conversation. Be forth-coming with them; offer them your bottom-line price and avoid sugar-coating it.



### I TYPE

When presenting pricing to an **I-type**, make sure to share what others are paying. I-types are people-oriented and are likely to feel more comfortable investing in a product that is trusted and enjoyed by other people. Avoid overwhelming them with numbers and specific data.



### S TYPE

Prospects who are more security-oriented **S-types** tend to prefer discussing financial aspects of a product after a personal connection has already been established; make sure they feel comfortable before sharing cost. Then, focus on how your company will make sure their purchase is worthwhile. Be sure to mention available warranties or extended service agreements, without pressuring them to make any rushed decisions.



### C TYPE

If your prospect is a **C-type**, they will likely want to discuss all specific information surrounding price. Be prepared to support your cost breakdown with data and logical, justifiable reasoning.

*By addressing the cost conversation in a way that helps each individual prospect fully understand and feel more comfortable with pricing, you can help everyone avoid a lot of unnecessary stress.*



*Section 5* \_\_\_\_\_

# Handle sales objections



## Handle Sales Objections

Despite the fact that you may have a great pitch and a wonderful product, you'll likely still frequently encounter objections. People object for many different reasons: stress, skepticism, indecision - sometimes, even just to have the upper-hand in a conversation. To help overcome opposition, it's important to be aware of why a specific prospect might be objecting.



### D TYPE

Because **D-types** tend to be straight-forward and assertive, they are likely to share concerns about things like control over administering it, flexibility in the contract, and hidden costs in the long-term. Be prepared to confidently offer solutions to their objections: allow them to have some control over implementation of the product and be direct about contract flexibility and overall, complete price-breakdown.



### I TYPE

Prospects who are **I-types** may be concerned with missing features of the product, its influence on the product roadmap, and a lack of social proof. You can help navigate these problems by remaining optimistic, sharing compelling stories about other clients, and relating your product to a growing social trend.



### S TYPE

Thorough **S-types** want to be sure they're making the right decision; they might raise concerns about your company not being big enough or the product not having enough case studies and positive, proven data. Help relieve their worries by allowing them to fully share their concerns, offering specific evidence of your product's capabilities, and giving them time to consider their options.



### C TYPE

When pitching to a **C-type**, they may raise concerns about the security of the product, the ease of rolling it out or administering it, or the overall cost breakdown. You should be prepared to thoroughly address these problems; focus on building a plan to easily introduce or implement the product and bringing in outside data to support the company's security and pricing model.

*Being prepared to negotiate through different concerns in a way that caters to the needs of specific personalities will help you feel more confident in every sales meeting.*

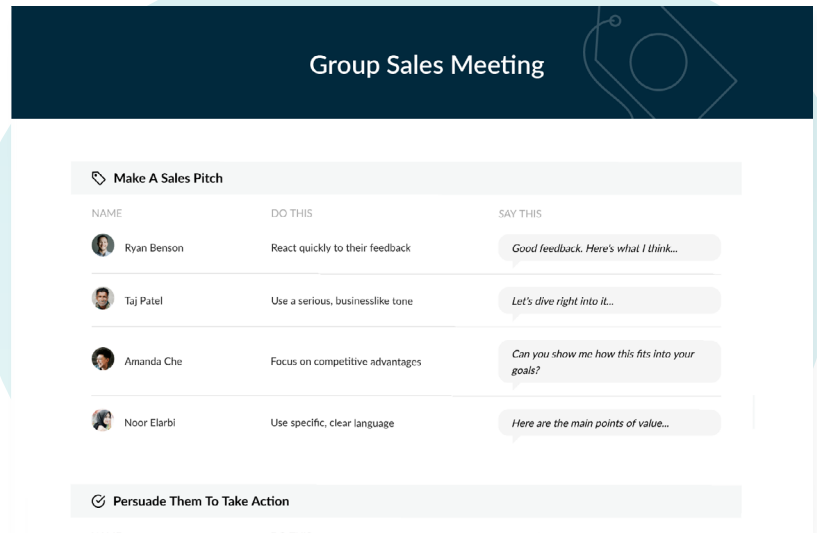


*Section 6* —————

# Understand Prospects using Playbooks

## Understand Prospects using Playbooks

Playbooks are detailed, shareable, customizable reports that offer advice for understanding and communicating effectively with a prospect. With Playbooks, you can get more scenario-specific advice for everyone. Whether you're reaching out to a prospect for the first time or pitching your product to their entire team, Playbooks can help give you the right advice for the situation so you can feel more confident and knowledgeable when communicating with others.



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*Learn more about how you can build and share Playbooks in Crystal's full-length ebook.*

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## Build Personas

When you're regularly selling to a lot of people, you may notice similarities between your prospects. For example, it might seem like they all ask detailed questions about how the solutions work. However, it's important to avoid behaving the same in each pitch or outreach email. Personality insights can help you understand how each person aligns with your average customer persona so you can effectively communicate with each person.

Learn more about using Tags in Crystal to build personas [here](#).



*Section 7* —————

# **Sell with certainty**

# SELL WITH CERTAINTY

Every prospect has their own communication style, preferences, and concerns, which means every sales interaction needs to be personalized. You can be prepared by understanding your prospect's personality and changing your communication to fit their preferred style.

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*By understanding personality and learning to cater the conversation to your prospects, you email, call, or conduct meetings with more confidence and success.*

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# Before Crystal, *I was flying blind*

Give your sales team personality insights and advice for their clients, so they can navigate every meeting with confidence.



LIKES COMPETITIVE ADVANTAGE

LIKES STABILITY AND SECURITY



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