

# *HOW TO INTRODUCE YOUR TEAM TO CRYSTAL*



By Greg Skloot, President of **Crystal** 

# CRYSTAL

## HOW TO INTRODUCE YOUR TEAM TO CRYSTAL

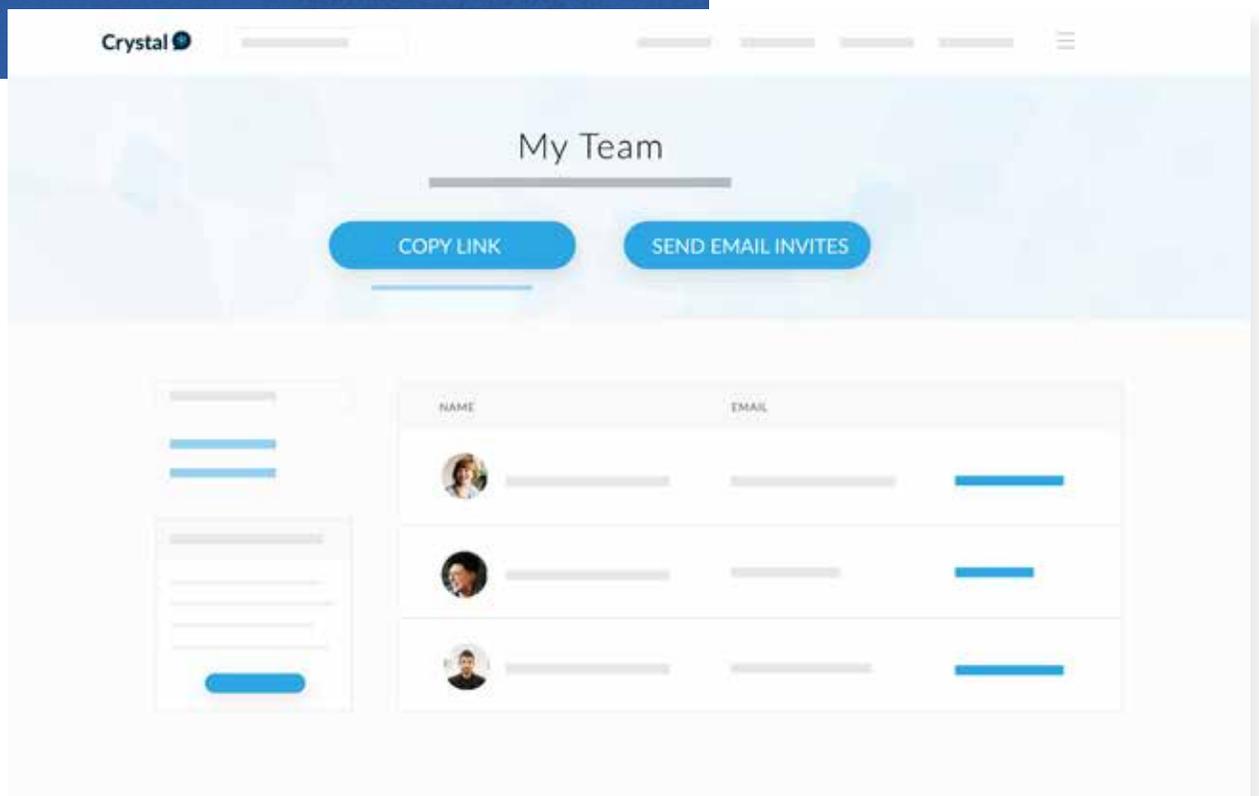
When you know and love Crystal, it can be exciting to share with your team. If you know how to invite others to sign up and share the right resources, getting started with Crystal can be straightforward and simple. In this guide, we'll break down a few steps to help you get your team set up with Crystal.



# Ensure everyone has created an account

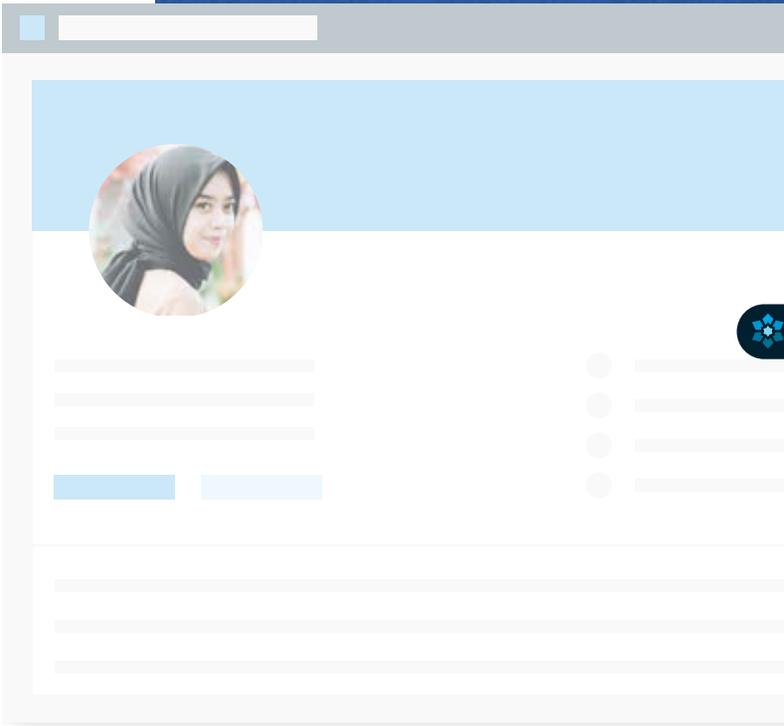
Before they can begin exploring what personality insights have to offer, the members of your team will have to create Crystal accounts. You can help by inviting them to do this through your [Team Page](#). There, you can either share your unique team invite link with the team or send email invitations from the top of the page.

**QUICK TIP:** Once your team is set with Crystal accounts, you can also add and remove users or licenses from the Team page.



# Ensure everyone has installed the Chrome Extension

Though each person will be prompted to install the extension when they sign up, you can follow up with your team by sharing a direct link for them to download the extension from the Chrome Store. Just copy and paste [this link](#) into an email and encourage them to install it so they can utilize the tool. You can also include [this video tutorial](#) so people know how to use the extension.



 **Noor Elabri** *Predicted Profile*

Noor tends to appreciate Learning new skills and diving deep into problems

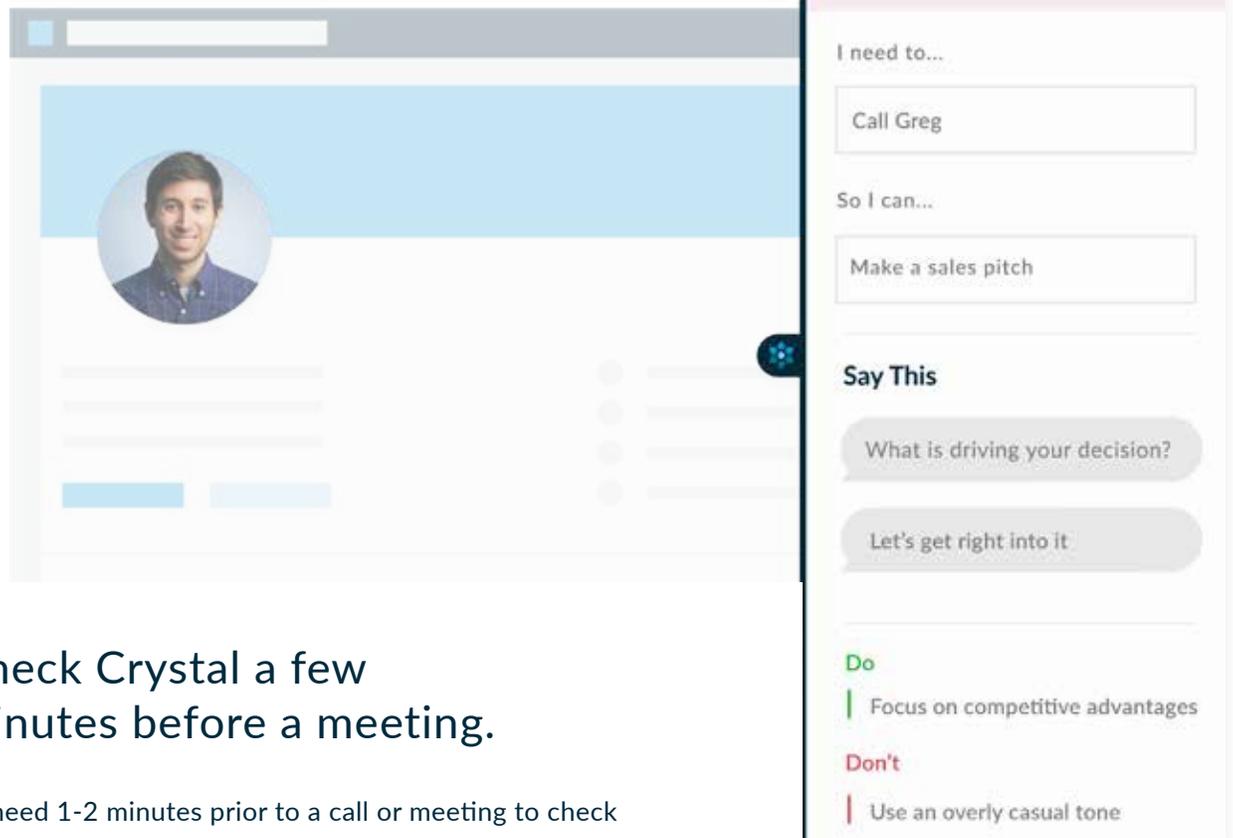
- | **Type:** Skeptic (Cd)
- | **Likes:** giving feedback
- | **Avoids:** unfocused conversations

 PERSONALITY MAP



# Encourage users to build Crystal into common processes

The best way to make sure your team is getting the most out of Crystal is to share a few ways they can use it every day. In the same email outreach you send to encourage the Chrome Extension installation, include a few of your favorite ways to use Crystal. Here are a few suggestions:



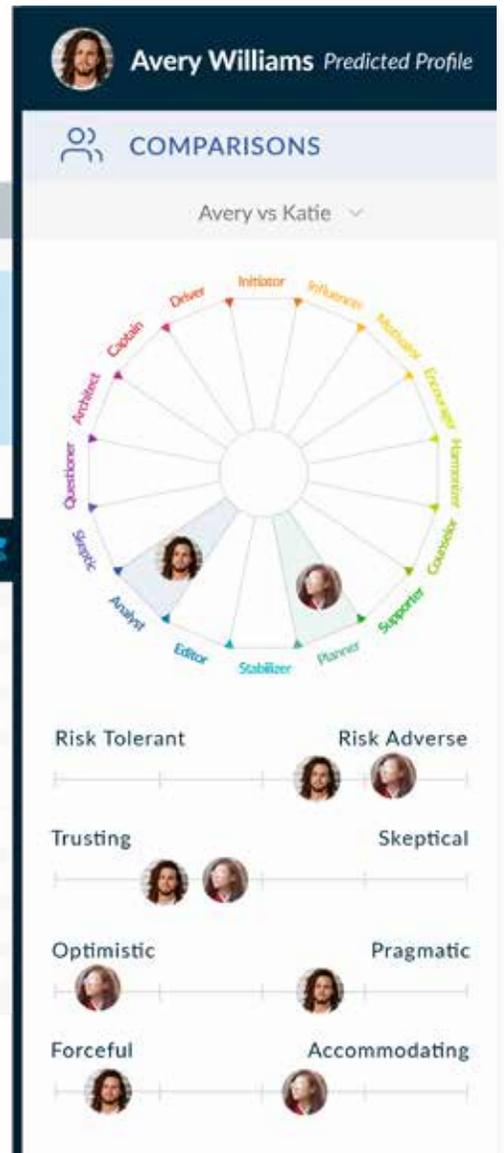
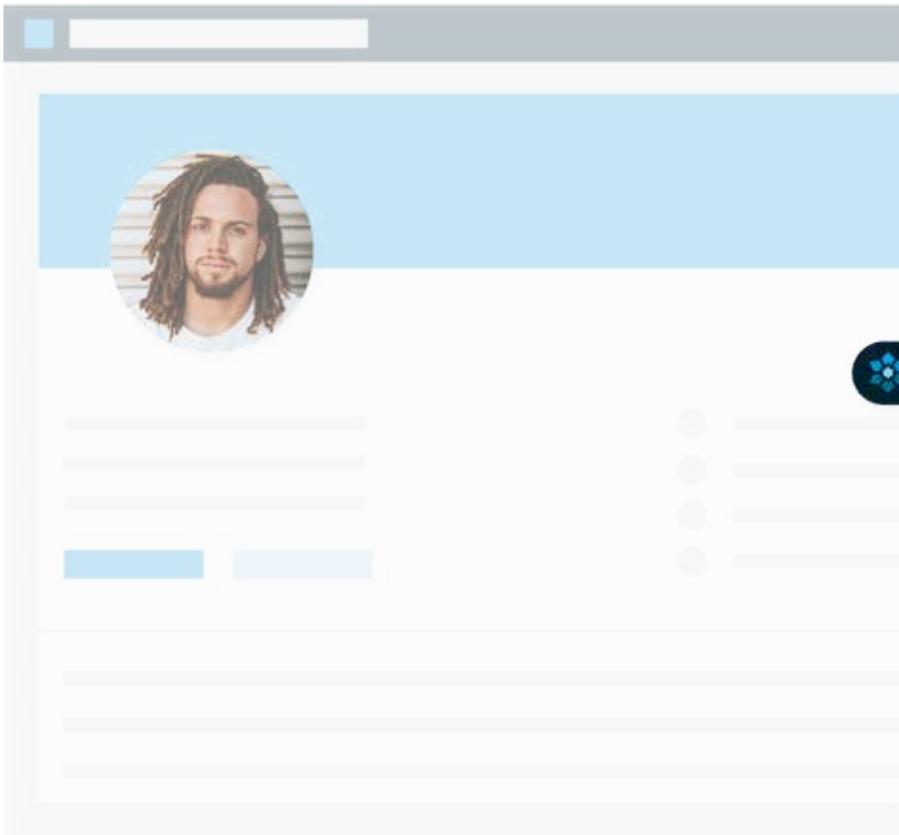
The image shows a screenshot of the Crystal Chrome Extension interface. On the left, there is a profile card for Greg Skloot, labeled as a "Predicted Profile". The main part of the interface is the "CONVERSATION COACH" tab, which provides suggestions for communication. It includes sections for "I need to..." (Call Greg), "So I can..." (Make a sales pitch), "Say This" (What is driving your decision?, Let's get right into it), and "Do/Don't" (Focus on competitive advantages, Use an overly casual tone).

## 1 Check Crystal a few minutes before a meeting.

You only need 1-2 minutes prior to a call or meeting to check Crystal and get insight on how to best communicate. It should be a quick, easy process that gets built into your workflow. Crystal can offer clear suggestions for communicating with each person in a variety of scenarios in the "Conversation Coach" tab of the Chrome Extension.

## 2 Share the personality insights with others

Take screenshots of a prospect's trait comparison meter and personality overview from the Chrome Extension and send it to them. You can help them understand how the two of you may naturally get along, as well, so they can feel more prepared for and inclined to take on the meeting. It's also sure to impress that you did your homework!



# 3 Use an email template from Crystal

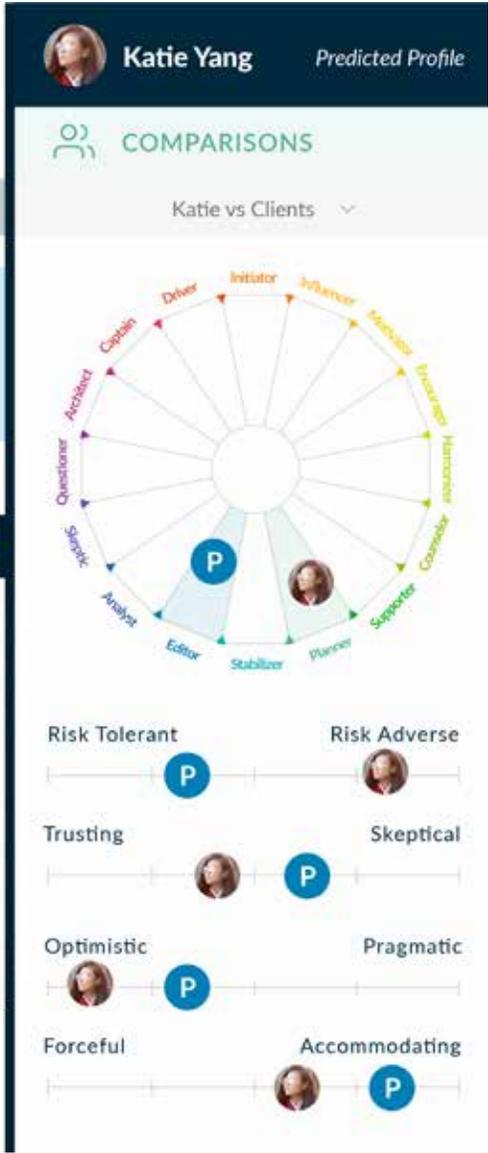
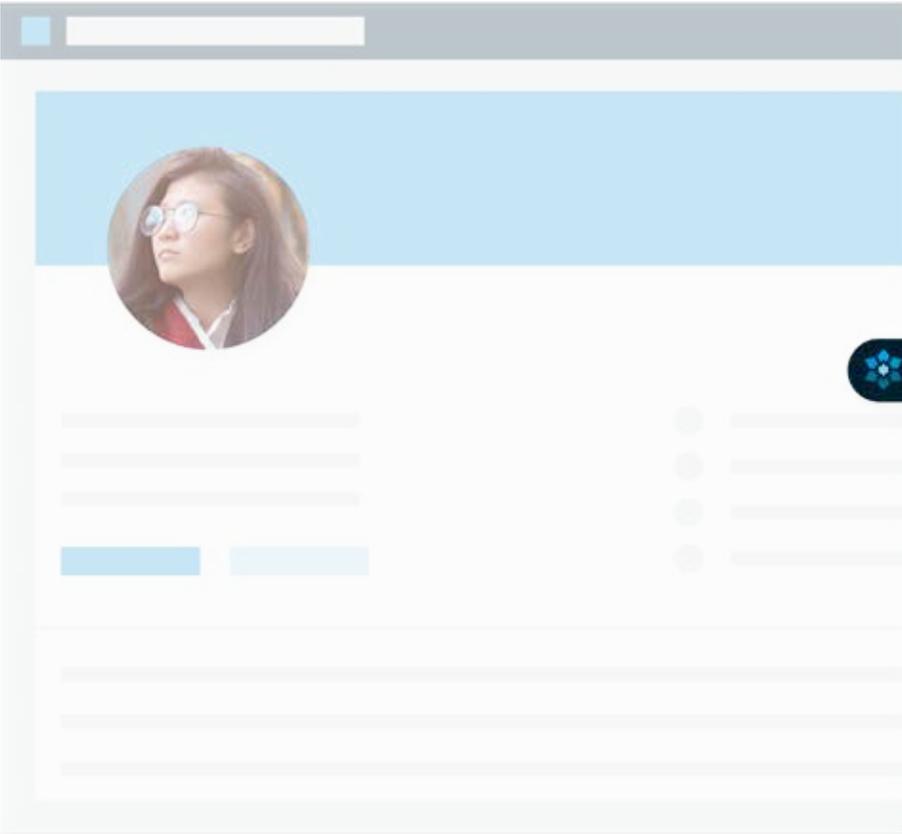
Before sending a cold message, use a personalized email template to ensure you're writing effectively for each recipient. Crystal has a wide range of templates, including topics like "Recruiting for a job" and "Sales Pitch" to name a couple. You can find templates in the "Email Templates" tab of the Chrome Extension.

The image shows a browser window with a profile page on the left and a Crystal Chrome extension sidebar on the right. The profile page features a circular profile picture of a man with a beard and a blue header. The sidebar is dark blue and contains the following elements:

- Profile: Taj Patel, Predicted Profile
- Section: EMAIL TEMPLATES (with an envelope icon)
- Buttons: Give Advice, Schedule Meeting, Discuss Compensation
- Section: Discuss Deadline (with a purple header)
- Text: Taj, I haven't heard back from you yet. Do you think we'll be able to have everything done by the deadline? Let me know if I can help. -[Your Name]
- Buttons: Recruit for Job, Reject Applicant, Sales Pitch, Investor Pitch

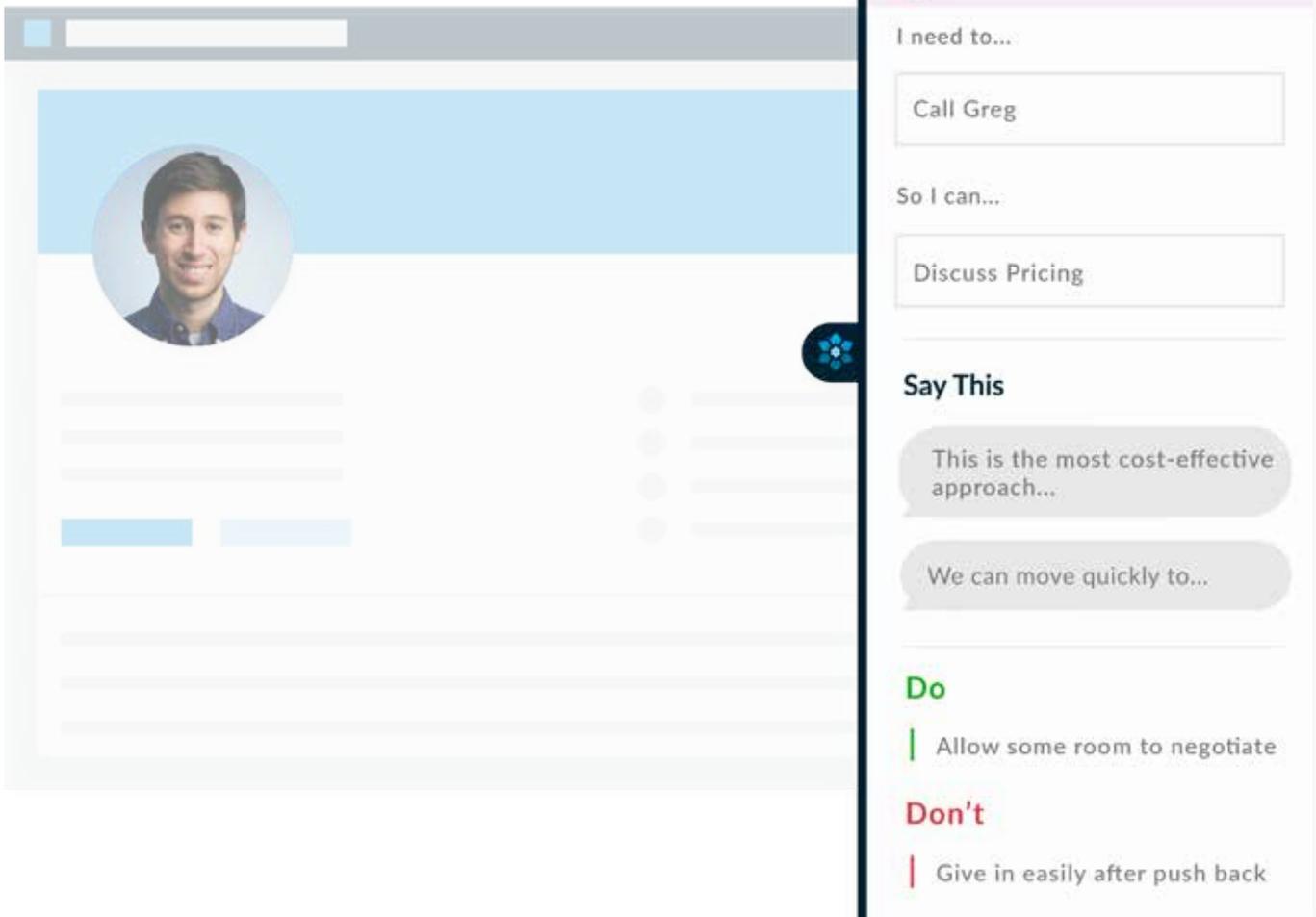
# 4 Tag each prospect so you can see averages over time.

Crystal allows you to “tag” each personality you predict on the Chrome Extension. Through organizing people by tags, you can get a deeper insight into how someone compares to the rest of the cohort. For example, if you tag several clients with a “Customer” tag, Crystal will create an average profile for your customers. Then, you can compare your prospects to the “Customer” tag to know if that person would fit into your target personality demographic.



## 5 Check the Conversation Coach prior to discussing pricing.

One of the most useful cases for Crystal's Conversation Coach is in facing pricing discussions with prospects and customers. Crystal can make the conversation run more smoothly by providing you with precise ways to approach the topic with each person.



The image shows a CRM interface with a contact profile for Greg Skloot. A sidebar titled 'CONVERSATION COACH' provides specific advice for discussing pricing. The sidebar includes sections for 'I need to...', 'So I can...', 'Say This', 'Do', and 'Don't'.

**Greg Skloot** *Predicted Profile*

**CONVERSATION COACH**

I need to...

Call Greg

So I can...

Discuss Pricing

**Say This**

This is the most cost-effective approach...

We can move quickly to...

**Do**

| Allow some room to negotiate

**Don't**

| Give in easily after push back



# Share training material

You can help make sure everyone gets the most out of Crystal by sharing plenty of training materials with your team.

## TRAINING VIDEOS

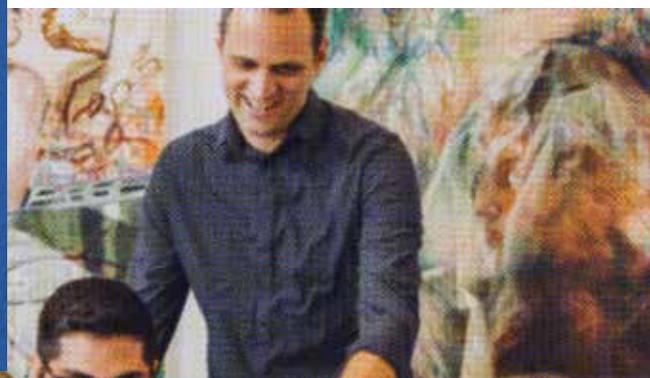
We offer a library of training videos available anytime. Whether you'd like to see a closer look at dashboard profiles and using the conversation coach, or you want to learn more about other features, like the Chrome Extension, our videos offer easy to understand instructions to help you make the best use of Crystal. Watch the training videos [here](#).

## HELP CENTER

You can also visit our online help center to answer questions about joining Crystal Premium, building playbooks, understanding the personality insights, installing the mobile app, and more. Visit our help center [here](#).

## SUPPORT

We offer friendly, fast and real-human support anytime. If you have any other questions, we're here to help! Just email us at [hello@crystalknows.com](mailto:hello@crystalknows.com).



# Understand anyone's *communication style*

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Thousands of professionals globally use Crystal to communicate more effectively, write more persuasively, and build trust faster with new people.



**MAKES QUICK DECISIONS**



**APPRECIATES DETAIL**



**TRY IT TODAY**

*Click to learn more*

**UPGRADE TO PREMIUM**