

ULTIMATE GUIDE TO

# CRYSTAL ROI



*How your company can get  
the most value out of Crystal*

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

# What is Crystal?

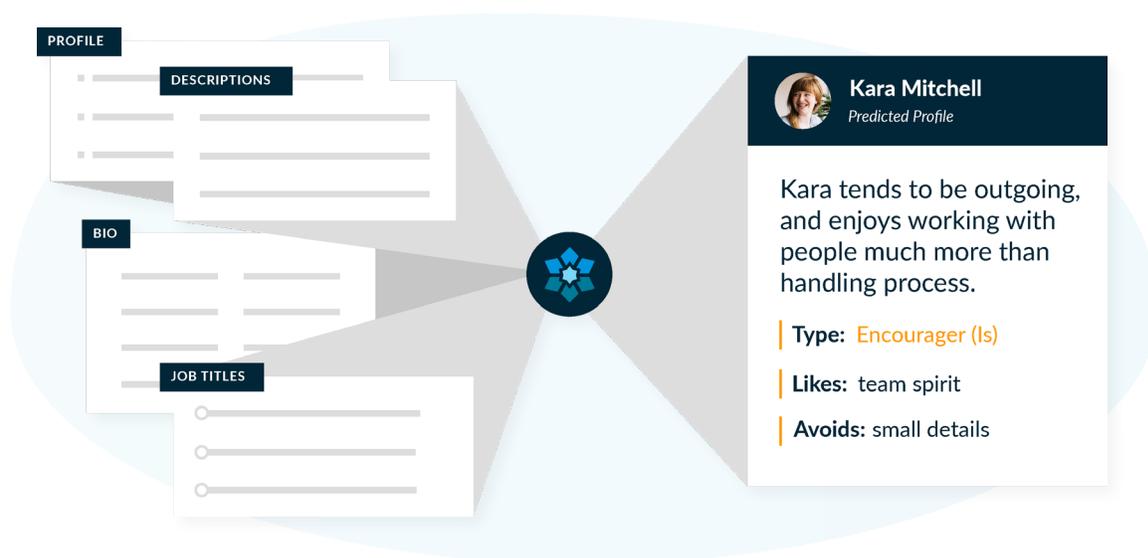
# WHAT IS CRYSTAL?

Crystal is the app that tells you anyone's personality. As a pioneer in Personality AI, Crystal analyzes millions of online data points to accurately identify a person's personality type, motivations, communication style, and other behavioral traits. Thousands of professionals globally use Crystal to communicate more effectively, write more persuasively, and build trust faster with new people.

Crystal offers a set of online tools, including a web app, chrome extension, mobile app, slack app and APIs, which enable professionals to communicate more effectively and make better decisions in their everyday conversations. Crystal is used across a wide variety of roles:

- **SALES:** Crystal helps you communicate easily with prospective customers.
- **MANAGEMENT:** Crystal helps you build better teams by recognizing each person's strengths, managing and working with their blindspots, and learning to productively resolve conflict.
- **RECRUITING:** Crystal helps you communicate effectively with candidates, identify the right people for each role, and assist with new hire onboarding.

This ebook is a guide for people who want to introduce Crystal at their organization and get the most out of it. You will learn how Crystal works, the many ways people use Crystal, and the most effective ways to explain Crystal's value to the stakeholders in your organization.



# COMPANY BACKGROUND

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Crystal was founded in 2015 and is headquartered in Nashville, TN. We have raised \$7M from leading investors including Salesforce Ventures and HubSpot. We have thousands of customers including Oracle, Accenture and Airbnb.



## *Drew D'Agostino*

CEO

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Drew D'Agostino is the CEO of Crystal. Previously, Drew was CTO of Attend.com, an event management software company. He is a thought leader on Personality AI and has been featured in Inc, Fortune, CNN, Fast Company, MIT Technology Review, Wired, and the Guardian.

## *Greg Skloot* PRESIDENT & COO

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Greg Skloot is the President & COO of Crystal and a passionate evangelist for leveraging AI to help people understand anyone's personality and build stronger relationships. Previously, Greg was Vice President of Growth at fitness-technology startup Netpulse, where he led sales, customer success, marketing, and operations until the company was acquired by eGym in 2018. Earlier, he was the CEO of Attend.com.



*Section 1* \_\_\_\_\_

# How does Crystal work?

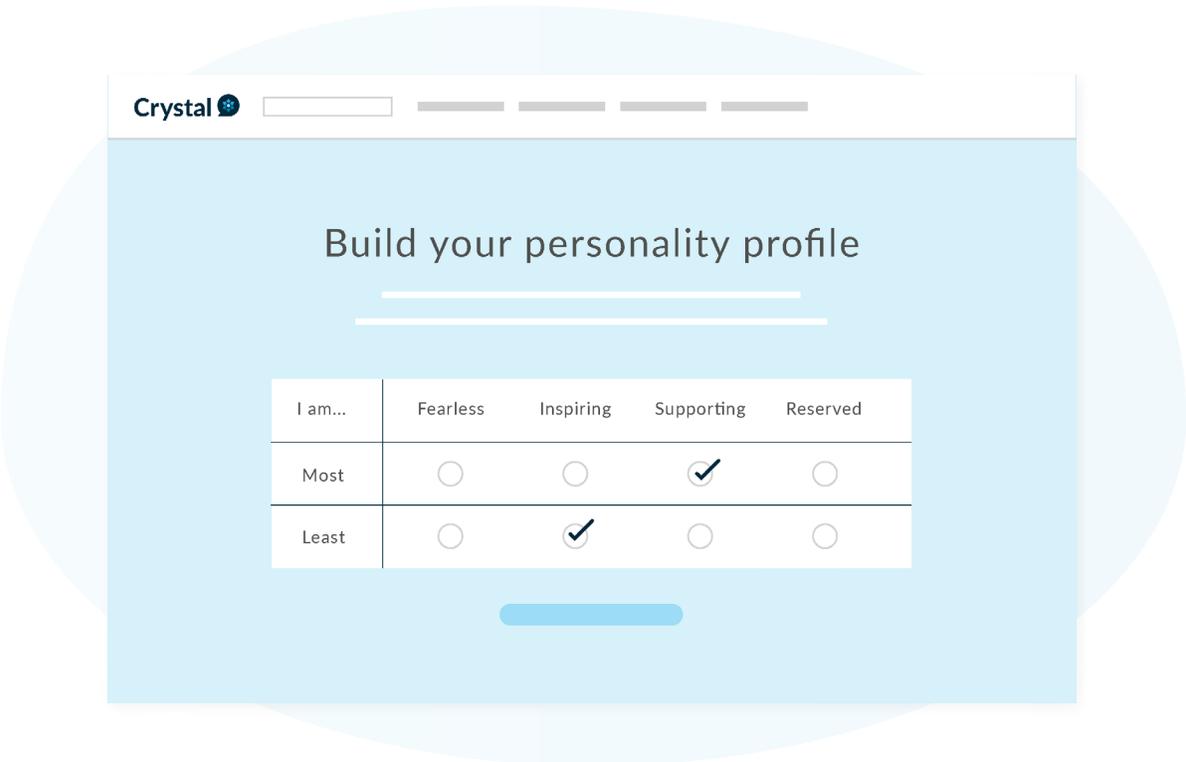
# HOW DOES CRYSTAL WORK?

Crystal is the leader of a new category of technology called Personality AI. This technology harnesses artificial intelligence and machine learning to help you understand anyone’s personality, even if you haven’t met the person yet. Crystal can create a personality profile for anyone, whether a co-worker, friend, prospect, customer, or job candidate. Personality profiles are created in two ways:

## 1. ASSESSMENTS *(for people you know, like a co-worker)*

Crystal uses a short, forced-choice-style assessment to identify someone’s personality. The assessment requires that people select the words that are “most like me” and “least like me” from 14 sets of 4 words. After completing it, Crystal generates a personality profile, which offers insights into an individual’s natural strengths, energizers, stressors, and personality types. Crystal’s personality assessment consistently reports above 95% accuracy. .

*You can take this personality assessment for free at [crystalknows.com/app/assessment](https://crystalknows.com/app/assessment)*



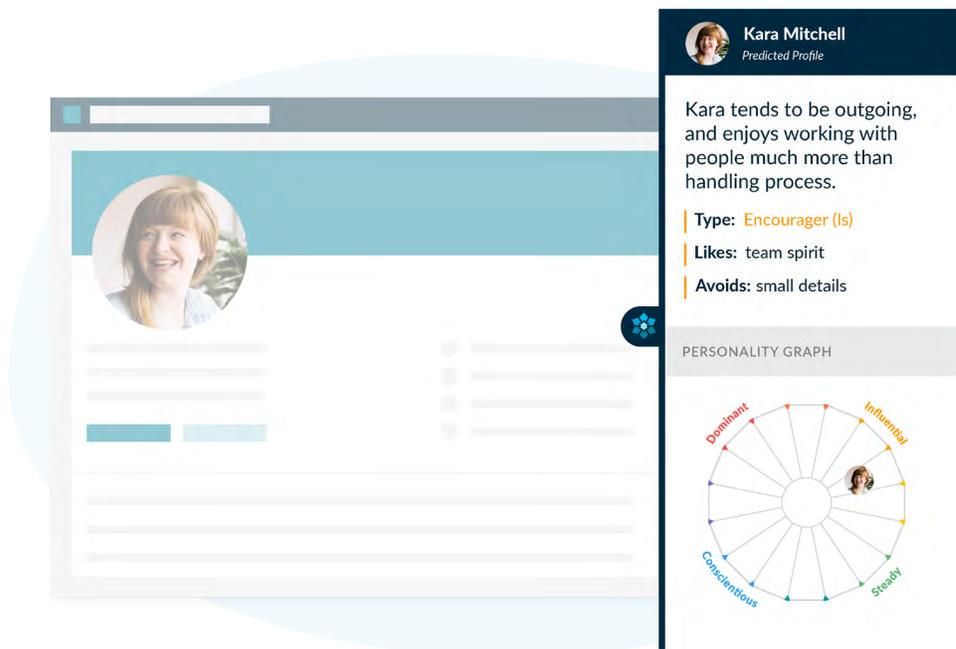
## 2. PREDICTIONS *(for people you don't know, like a sales prospect)*

When you are unable to have someone complete a questionnaire - such as when you are reaching out to a prospect or candidate for the first time - Crystal can generate a personality profile using AI (artificial intelligence). Using AI, you can predict someone's personality type based on other data, like their LinkedIn profile, resumé, or writing style from other biographical text samples. Predictions are most helpful for situations where you do not yet know the other person well, such as sales, recruiting, and customer service.

*Crystal is able to predict personality by using AI and machine learning to analyze a text sample from sources like:*

- Social media profiles
- Online bios and articles
- Resumes

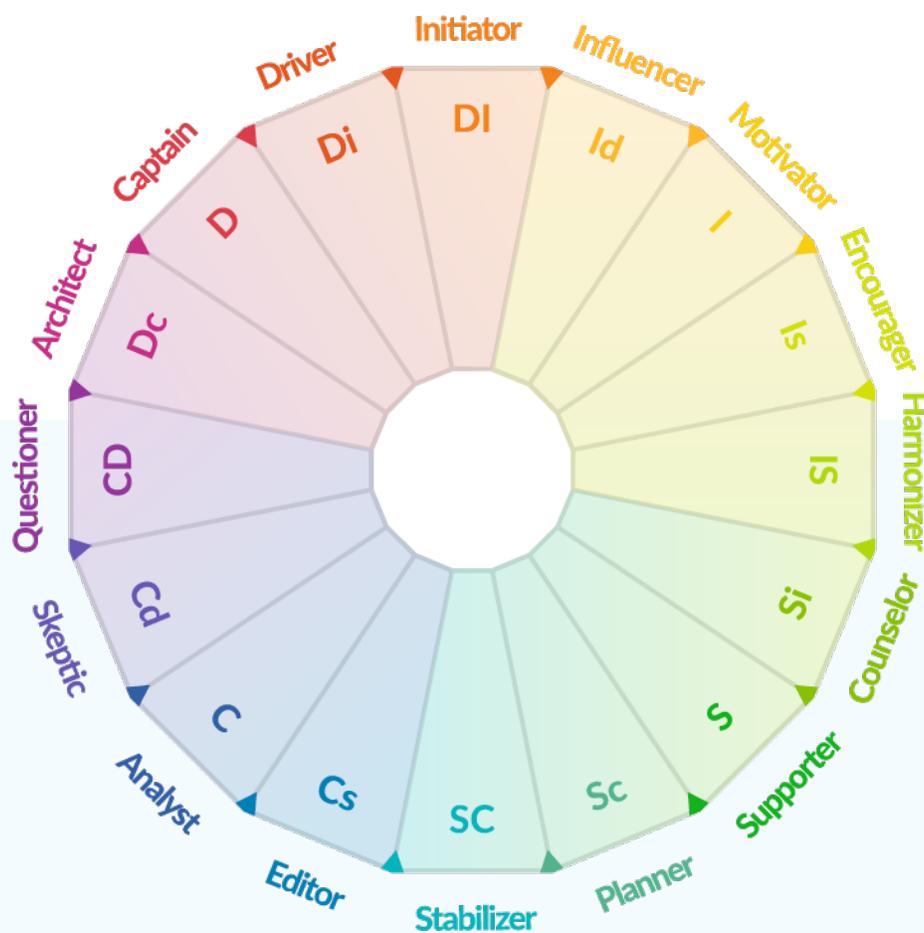
Personality AI uses natural language processing to assess the personality type of the person who wrote a text sample. Just as an assessment requires someone to make intentional choices to identify their personality type, different personality types use different patterns, words, and phrases when they write. With an ever-improving personality analysis algorithm, Crystal is able to predict personality profiles with approximately 80% accuracy.



# BASICS OF PERSONALITY

When Crystal generates a personality profile, 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

These differences are extremely important to understand when approaching a conversation with another person. For example, someone who is a warm, people-oriented Supporter (S) is less likely to engage in a discussion about facts and data. They'd usually prefer to engage in a more personal, get-to-know-you conversation. An Analyst (C), on the other hand, tends to enjoy learning more about specific, concrete information.

Once you know someone's DISC type, you unlock a new understanding of why they behave in certain ways and how to best communicate with them. This can be relevant for sales, leadership, recruiting and more.



*Section 2* ———

# Crystal for Sales Teams

# CRYSTAL FOR SALES TEAMS

Our hyper-connected modern world has made the sales landscape noisy and the fight for someone's attention competitive. Prospects are now receiving more messages than ever, making them much more selective on what sales messages they respond to. Often salespeople are left confused and frustrated with their outreach. This causes many organizations and individuals to use brute force and play the numbers game to start new conversations, which only makes the problem worse, as they and their competitors pump prospects' inboxes with a steady stream of boilerplate pitches and meeting requests.

While the vast majority of sales organizations choose this high-volume, low-touch strategy, the thriving minority knows that *prospects respond most eagerly when they feel understood*—they know that the most important parts of human connection cannot be automated. By using personality tools, like Crystal, to better understand prospects, you can have a significant advantage over the competition in this critical area, and reach new customers more effectively.

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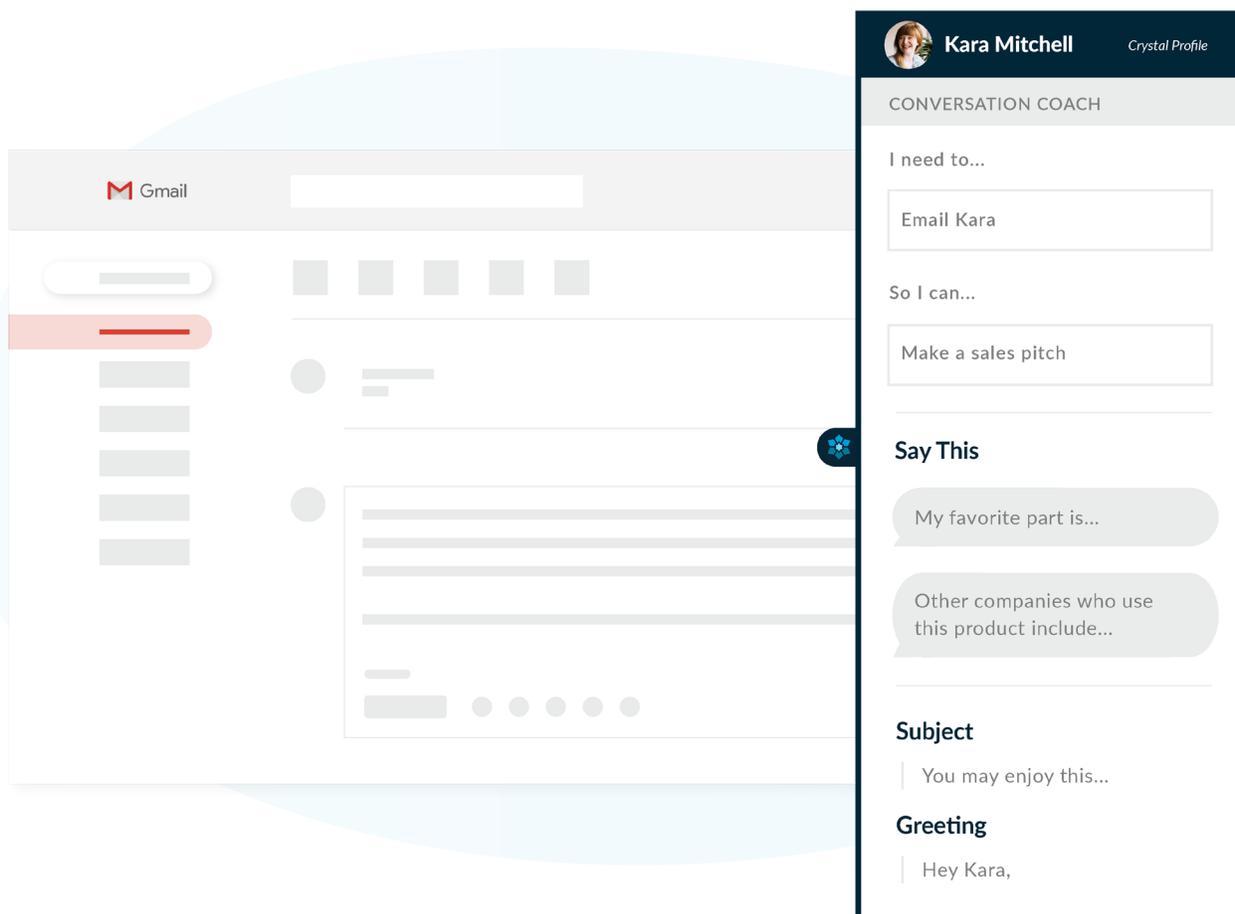
*Sales professionals use Crystal throughout the sales lifecycle, as described on the following pages:*

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# 1. IMPROVING YOUR OUTBOUND EMAILS

While the rise of online communication, through sites like LinkedIn, Twitter and the like have made it much easier to reach out to people, it also creates a major problem: oversaturation. In order to effectively reach people through email, we need to break through the noise and clutter of our prospects' inboxes. We need to learn to communicate with someone in the way THEY want, rather than addressing them in the way WE want. In order to do that, we need to understand their personality.



Crystal's Chrome Extension *generates a predicted personality profile after analyzing someone's LinkedIn page*. This helps you better understand how your prospects prefer to communicate and offers suggestions for how to format and phrase your emails to them. Whether you need to build personal rapport, request meeting times, negotiate, collaborate, or just make an effective sales pitch, you can start guessing less and sending emails with more confidence.

**Kara Mitchell** Crystal Profile

CONVERSATION COACH

I need to...

Call Kara

So I can...

Make a good impression

**Say This**

I'm glad we can catch up...

Hey! So great to meet you...

You should hear this...

**Subject**

You may enjoy this...

**Greeting**

Hey Kara,

## 2. IMPROVING YOUR DEMOS

Though you may have pitched the same idea or presented a product hundreds of times, every prospect may perceive your presentation differently. When planning a call or meeting with a potential client it's important to consider the three following questions:

- What do they want?
- Why do they want it?
- How do they want to interact?

It can be hard to know the right answers without really knowing the other person. To have a better understanding, you need to delve a little deeper into their personality. Crystal's Chrome Extension can also help in your demos by offering personality insights, while the Conversation Coach can help by giving suggestions that help you cater your pitch to each prospect.

## 3. IMPROVING PRICING DISCUSSIONS AND NEGOTIATIONS

For most people, fewer things create more anxiety than conversations about money. And while talking about finances can be stressful, sales professionals have these delicate conversations daily, so they need to become comfortable with them in order to succeed. In the same way that personality impacts the way we think about making plans or working through conflict, it also affects how we think about details like pricing. While some people are very direct and expect to talk through financial details immediately, others are likely to be offended if you address money-related topics too quickly.

By understanding personality and using Personality AI to improve your communication skills, you can **be prepared to better handle challenging cost conversations**. Through the use of Crystal's Chrome Extension and Conversation Coach, you can learn how to easily navigate difficult pricing conversations, even if you don't know your potential client very well.



 **Kara Mitchell** *Crystal Profile*

CONVERSATION COACH

I need to...

Email Kara

So I can...

Negotiate

**Say This**

How would you feel about this...

This is what I worked out with some other people...

**Subject**

Let's work this out

**Greeting**

Hey Kara,

## 4. IMPROVING HOW YOU 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; and sometimes, they may object simply to gain the upper-hand in a conversation. To overcome resistance like this, it's important to be aware of why a specific prospect might be objecting. By having a better understanding of their personality and what their main concerns tend to be, with help from insights from the Crystal Chrome Extension, you can overcome and push past opposition.

## HOW TO INTRODUCE YOUR SALES TEAM TO CRYSTAL

Begin to integrate Crystal into your company by viewing personality insights for some of your current customers and showing them to the team. People will be amazed at how accurate some of the insights are; certain past experiences may even begin to make more sense.

Crystal

**Invite People**

*We'll send them an email link to take the assessment. Once they complete the assessment, you'll be able to view their personality profile.*

Type or paste the email addresses of the people you'd like to invite:

**SEND INVITES**



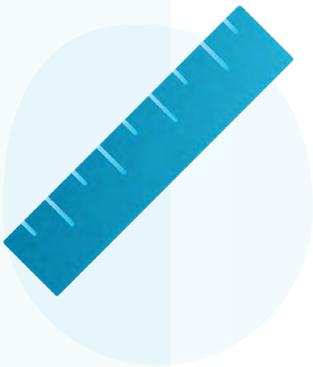
Try inviting your teammates and manager to sign up and complete the free personality assessment themselves. It's quick and can help you better understand one another, as well. You can even practice some of the suggested phrases with one another.



## GETTING STARTED

While you're getting to know Crystal, there are a few ways you can introduce it into larger organizations and teams:

- Start with a small group on a monthly payment plan.
- Work your way up to more members and annual plans.
- Choose a pilot group of people who are having many conversations with new prospects every day.



## HOW TO MEASURE ROI

You can also measure your return on investment by reaching out to reps to find out how their confidence has improved and how frequently they use the personality insights and data before their calls or meetings. Because Crystal is a part of an overall communication strategy, the results are best felt on the frontlines of outreach. This can be done in a few easy ways:

- Try sending out the Crystal user survey, which can help you understand the impact its having on the team.
- Test your emails' and meetings' effectiveness with and without Crystal's help.
- Track the increase in responses to email outreach as well as next steps taken from calls.



*Section 3* —————

# Crystal for Leaders

# CRYSTAL FOR LEADERS

Anyone who manages a team knows how challenging it can be to balance everyone's unique ways of thinking, working, and communicating; it can feel quite difficult to maintain an efficient, connected work environment. Some managers respond to this difficulty by simply accepting that the workplace will be uncomfortable or challenging, and they refuse to adapt their leadership style to fit with others.

The best managers know that a team will work most effectively when people feel valued, connected, and reasonably challenged. When leaders utilize tools like Personality AI and make an effort to understand everyone's unique strengths, manage the team's blind spots, and resolve conflict within working relationships, they can help everyone succeed.

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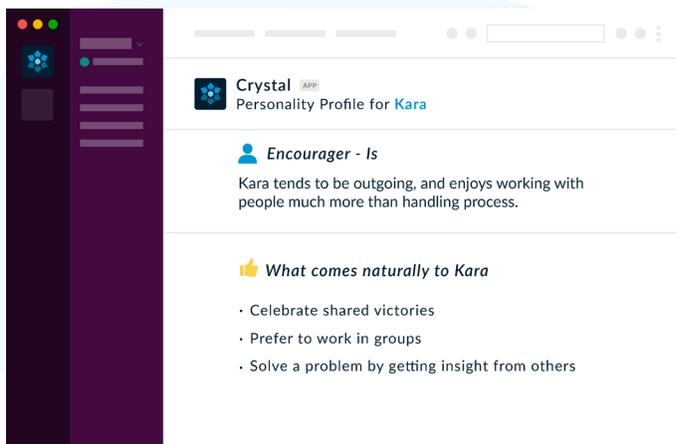
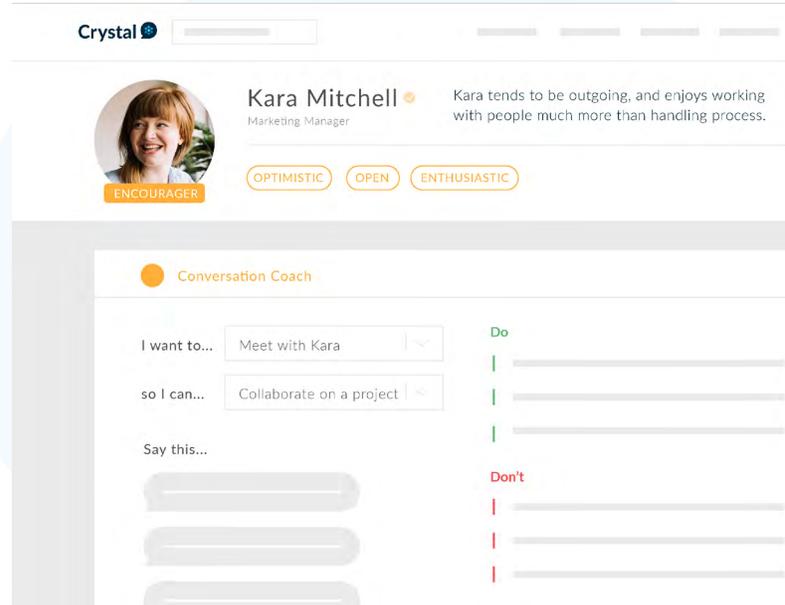
*As a leader or manager, Crystal gives you a powerful set of tools to build a healthy, productive team.*

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# COMMUNICATION COACHING

Every call, meeting, and discussion you encounter will be different and you won't always have much time to prepare. To help with this problem, you can use Crystal to get **scenario-specific advice for communicating with your colleagues, clients, and potential customers**. Whether you use Crystal's personality assessment to create a personality profile for someone or use the Chrome Extension to create a predicted profile, you have access to accurate suggestions for how best to communicate with them in any discussion. Crystal can help you resolve conflicts, collaborate on a project, brainstorm ideas, deliver difficult news, and more. Rather than flying blind, it is like having an expert sitting next to you, telling you the best way to begin the conversation, frame your message, and call others to action.



## Quick Tip

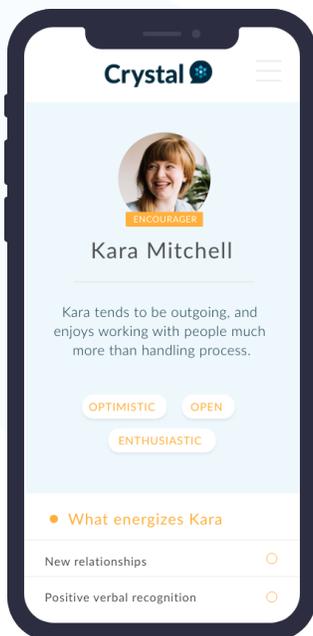
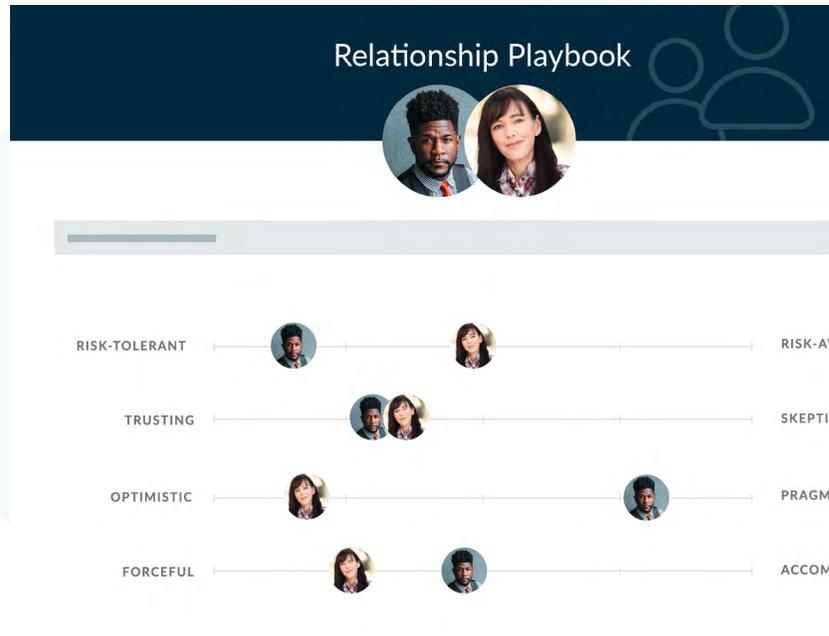
*Crystal's Conversation Coach is also available in our Slack app for convenient personality insights directly within Slack.*



# RELATIONSHIP PLAYBOOKS

As a leader, it's important to understand the different dynamics at play on your team. Each line of communication between people is important for helping a team cooperate and run smoothly. While you might not currently recognize all the intricacies of the team dynamic, Crystal can help you understand the ways in which different people are likely to work together.

Within Crystal, you can create Playbooks to **compare two personalities**. These playbooks can reveal innate differences, predict potential communication problems, assess possible strengths, and provide each relationship with advice for how to best communicate, work together, handle conflict, and many other situations. And though relationships are tricky and complex, a Playbook can offer insights that help people understand and overcome potential issues—they give everyone a chance to resolve conflict before it causes frustration, which will help you build a stronger, more cohesive team.



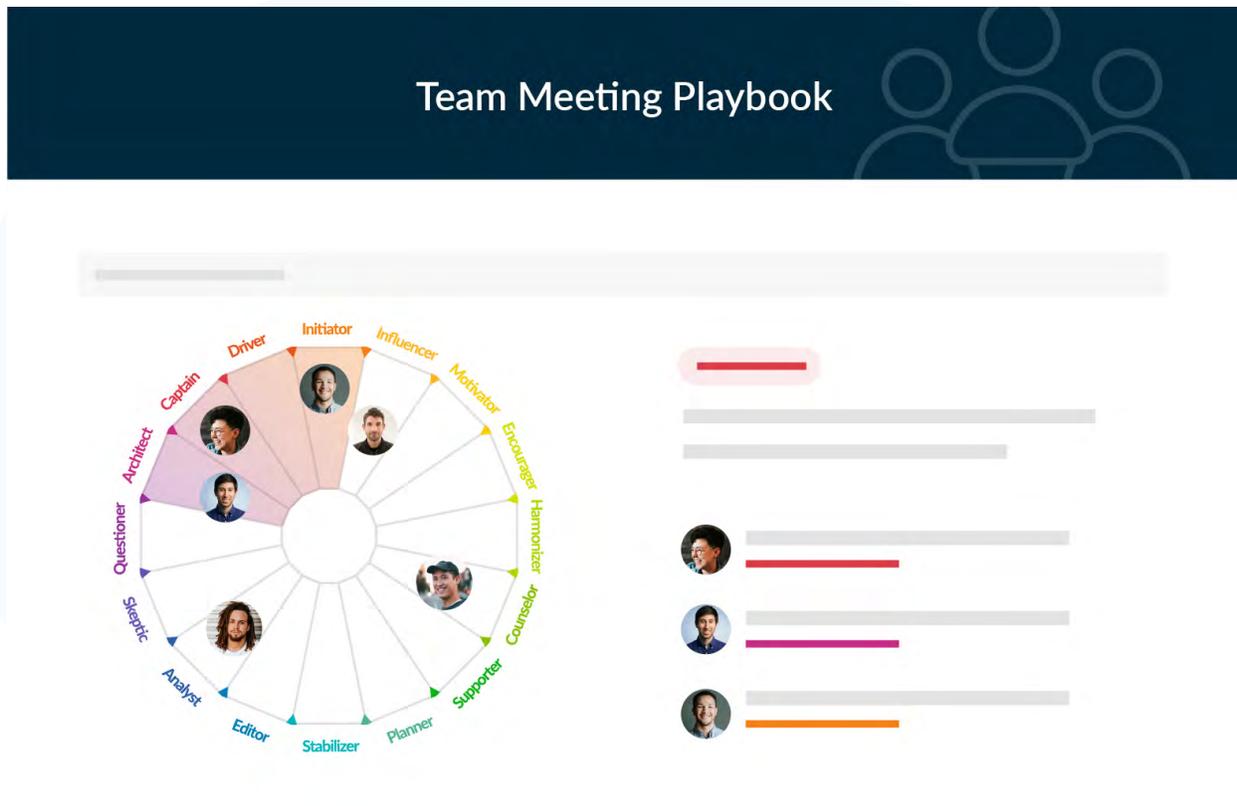
## Quick Tip

*Crystal also has a mobile app for iOS and Android. You can view all of your personality profiles and get communication advice right from your phone.*

# GROUP PLAYBOOKS

Ensuring positive individual relationships on a team isn't the only important aspect of building a high performing organization; the dynamic of the overall group is also key. You can better understand your own team by using a Group Playbook on Crystal. A Group Playbook is a tool that offers insight into how each person fits into a group. This can be a department, project team or combination of your employees and customers they frequently collaborate with.

These Playbooks offer *a personality breakdown of the group, team strengths and blindspots, and much more*. This will help you understand how to build diverse teams and avoid potential blind spots and conflicts. Further, the playbook shows how each person can contribute and focus on their unique strengths within the broader group.





## GETTING STARTED

We understand trying a new product can be intimidating. Leaders expect any new product to be worthy of their company's investment. It's important to see how Crystal's tools will make a measurable, practical difference in your team's daily work.

Start by having everyone complete the personality assessment for free. They can compare results, read each other's profiles, and offer their opinions.

You can then try using Playbooks, or the Chrome Extension on monthly subscriptions. This gives you a chance to see how impactful Crystal's tools are for your company before committing to an annual purchase.

## HOW TO MEASURE ROI

Crystal gives your team a language to discuss their personalities, strengths, blind spots, behaviors, and preferences. With the free platform, your team can understand the basics of each other's personalities very quickly, and start powerful conversations. Crystal's premium features allow everyone to dive deeper, get specific advice for one-on-one meetings, build stronger teams, resolve conflict, and more. You can gauge your ROI by:

- **Monitoring employee engagement - it should improve as people are being communicated with in the way they prefer.**
- **Have several group sessions to review Crystal results and get feedback on how people are using the insights.**
- **As moral increases and communication becomes more effective, you should notice projects getting completed faster.**



*Section 4* —————

# Crystal for Recruiters

# CRYSTAL FOR RECRUITERS

**Kara Mitchell** *Crystal Profile*

CONVERSATION COACH

I need to...

Meet with Kara

So I can...

Make a good impression

**Say This**

I'm glad we could finally meet

Listen to this...

**Do**

- Greet them with a casual, friendly demeanor

**Don't**

- Be too skeptical or questioning

In an extremely competitive hiring market, the most successful companies A) are strategic and methodical about pitching and presenting themselves to top level talent, B) balance their gut feelings with strong supporting data for hiring decisions, and C) set up their new hires for success by providing them with all of the information they need to integrate into their new role quickly and thrive.

When you need to make recruiting decisions on tight deadlines, these best practices can fall to the wayside in the name of efficiency. Goals like preparing detailed candidate research and personalizing candidate communication may sound like common sense, but in the daily grind of professional recruiting, it can be overwhelming or impossible with the existing tools at your disposal.

Luckily, Crystal helps recruiters accomplish all three of these goals in a fast, turnkey way that fits with your existing tools and processes. Crystal's tools can help recruiters with candidate outreach, assessing candidate-job fit, and new hire onboarding.

## 1. CANDIDATE OUTREACH

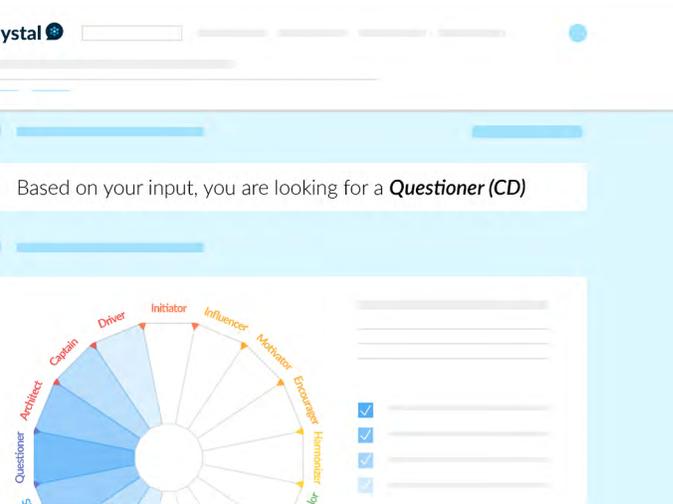
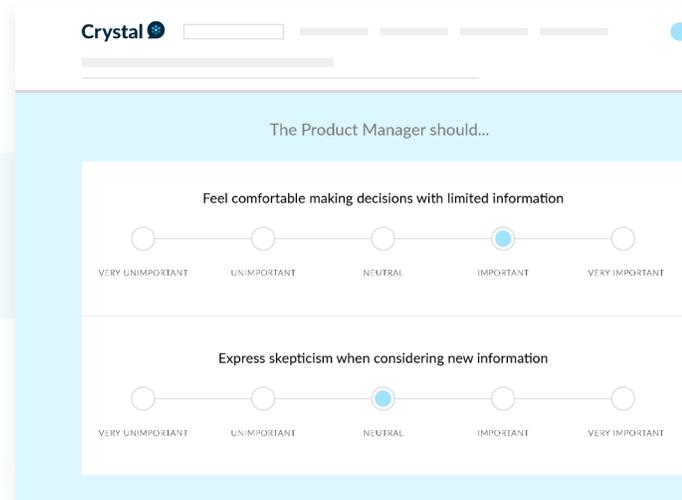
When reaching out to candidates, it's important to make each call, email, or meeting matter. While it's easy to get trapped in generic language and communication, ***you'll get the best results when you communicate with candidates in the style they prefer.*** As we mentioned earlier, Crystal's Chrome Extension generates a predicted personality profile after analyzing someone's LinkedIn page or resume, which helps you quickly learn more about a candidate's personality. You can also view suggestions that will help you make a good impression on each person and land the candidate that's right for your position.



## 2. USING ROLE REPORTS TO UNDERSTAND CANDIDATE FIT

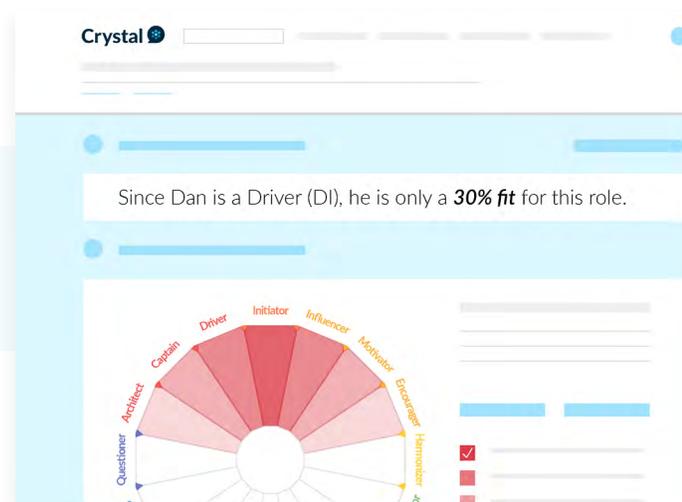
Crystal helps you quickly assess a candidate's personality and offers advice on roles and responsibilities that best suit them through a tool called the Role Report. It works like this:

Each stakeholder in the hiring decision completes a brief questionnaire about their ideal expectations for the role.



Based on the stakeholder input, Crystal generates an ideal personality type that most closely matches the indicated personality traits for a role.

With Crystal Premium+, you can compare candidates against that ideal personality type to see how they line up and where the gaps might be in finding an ideal fit.



This innovative hiring tool offers accurate insights for each unique position and work environment to ensure you're hiring based on expected role behaviors provided by the whole group, rather than just on gut feeling. For more details read our in-depth post here on [finding the right candidate](#).



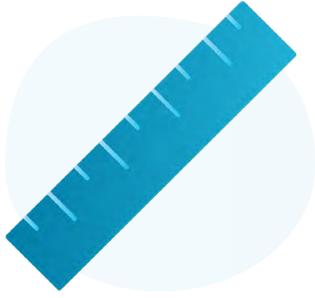
### 3. NEW HIRE ONBOARDING

When helping new hires adjust to their positions, it's important to understand the different relationships at play within a team, otherwise, adjusting to the group may be difficult for them. Within Crystal, you can create Playbooks to compare personalities, like that of the new hire and their co-worker(s) or supervisor, and see which people are likely to work well together. Playbooks offer tactical advice to improve communication, collaborate, navigate change, understand strengths and manage blindspots.



### GETTING STARTED

Getting started with Crystal is easy, and there are many ways to ensure it is a good fit for your team. You can always start with a small group and a monthly payment plan, which will allow you to conduct your own trial run and expand when you are confident Crystal is working well for your team. This way, you can gradually work your way up to more members and an annual plan. Just be sure to choose a pilot group of people who are having conversations with new candidates every day, so you can clearly see the impact it has.



## HOW TO MEASURE ROI

Because Crystal has helped recruiters at three main points in the hiring process, each aspect should be looked at individually when assessing its ROI.

### ***Candidate outreach and communication:***



Candidate outreach can be assessed by sending out the Crystal user survey to the team. You are also likely to get honest feedback by having several group sessions to review Crystal results and get qualitative responses on how people are using the insights.

### ***Assessing candidate-job fit:***



To understand your ROI in relation to assessing candidate-job fit, try using interview questions offered by Crystal's Role Report to see if you receive any interesting insights or discussion from candidates. This also allows you to ask team members who are experienced in a particular role to provide their input for that role.

### ***New hire onboarding:***



Measure new hire success by comparing data on how long candidates stayed with your company before Crystal's tools were used in the decision-making process and the same data for a period after Crystal is implemented.

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*You can find more information about how Personality AI works for Recruiters in our "How Recruiters Use Personality" ebook*



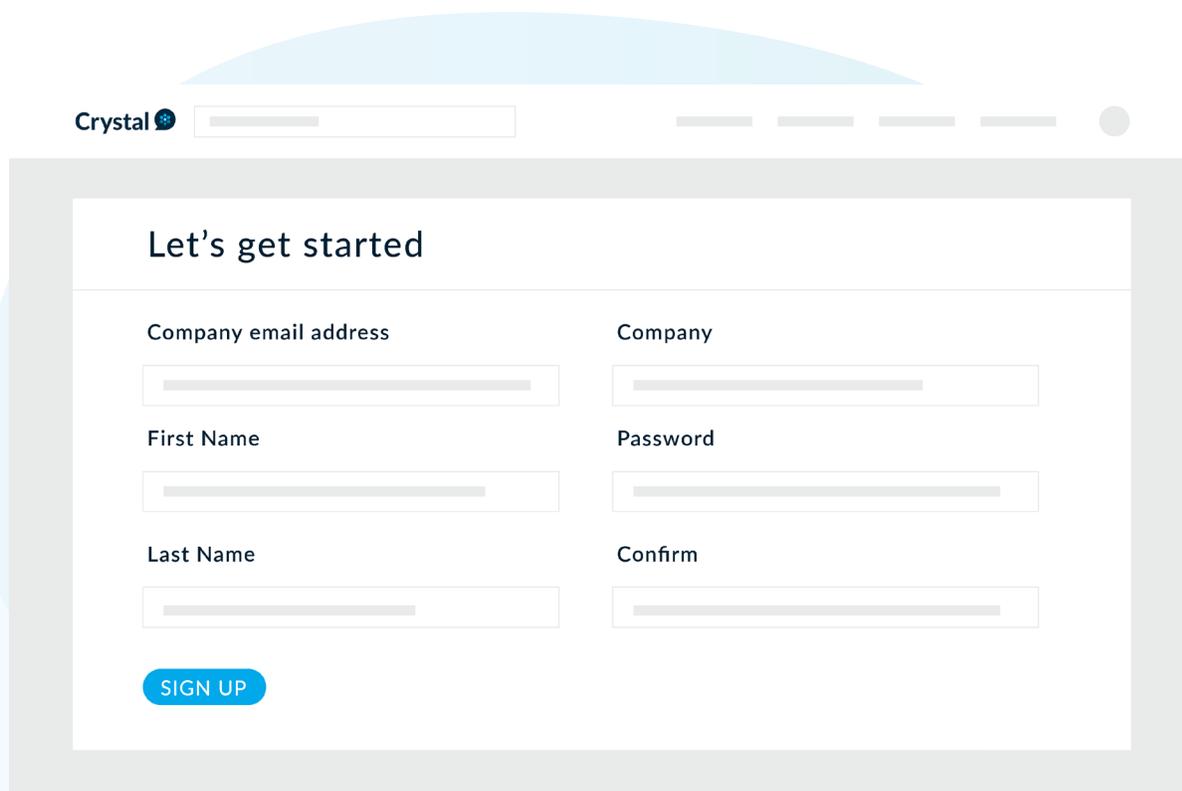
# GETTING STARTED

Personality AI technology is incredibly impactful; there are many tools that can help improve your day-to-day life, no matter what field or position you're in. Crystal is easy to use and free to start exploring. Try it out and see how it works for you and your organization.

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*We're here to help with any questions you may have along the way.  
Please reach out anytime at: [hello@crystalknows.com](mailto:hello@crystalknows.com)*

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A screenshot of a web browser window showing the Crystal sign-up form. The browser's address bar contains the Crystal logo and a search bar. The form is titled "Let's get started" and contains six input fields arranged in two columns. The left column includes "Company email address", "First Name", and "Last Name". The right column includes "Company", "Password", and "Confirm". A blue "SIGN UP" button is located at the bottom left of the form area.

Crystal

## Let's get started

Company email address <input type="text"/>	Company <input type="text"/>
First Name <input type="text"/>	Password <input type="text"/>
Last Name <input type="text"/>	Confirm <input type="text"/>

[SIGN UP](#)



# Understand anyone's *communication style*

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**