

*How personality can help you maintain important relationships with clients*

# PERSONALITY AI FOR ACCOUNT MANAGEMENT

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*Intro*

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# Adapt Your Communication

# ADAPT YOUR COMMUNICATION

When your job revolves around maintaining customer relationships, it's important to do everything in your power to keep them happy, and for that, communication is key. Ineffective communication can lead to frustration from important customers and clients, which can be harmful to your company's revenue.

Fortunately, a new technology known as Personality AI can help you communicate effectively with each client based on their personality.



## WHY DOES PERSONALITY MATTER FOR ACCOUNT MANAGEMENT?

Personality plays a large role in how we interpret the world around us. Our natural strengths, preferences, communication styles, and more, all influence how we understand and react to others.

When someone else is able to understand our personality and communicate with us in our own natural style, we are more inclined to like and trust them, which is central to building strong relationships with clients and customers. For example, those who tend to communicate in a warm and compassionate manner tend to engage more with those who are also warm and compassionate, while they tend to be wary of someone who seems blunt or direct. However, someone who prefers to communicate in a direct manner is likely to be skeptical of someone who seems overly warm and compassionate.

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*When you understand a client's personality, you can communicate with them in a way they want, which helps you maintain that relationship.*

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By using Personality AI, you can easily know exactly how to adapt your communication to best fit your client. Here's a quick breakdown of how Personality AI works.



*Section 1*

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# 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.

Personality AI unlocks another way to learn about someone's personality without an assessment. 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 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 personality analysis tool. On the left is a blurred profile card for Jasmine Summers. On the right is a detailed 'Predicted Profile' for her. The profile includes a text description of her personality, key characteristics like Type, Likes, and Avoids, and a 'PERSONALITY GRAPH' which is a circular diagram with 16 segments representing different personality traits. The segments are color-coded and labeled with letters: D (Dominant), I (Influential), S (Steady), and C (Conscientious). The 'Harmonizer (IS)' type is highlighted in green.

**Jasmine Summers**  
Predicted Profile

Jasmine tends to be very loyal, considerate, and open with emotions, relying more on intuition than logic.

**Type:** Harmonizer (IS)  
**Likes:** collaboration  
**Avoids:** verbal conflict

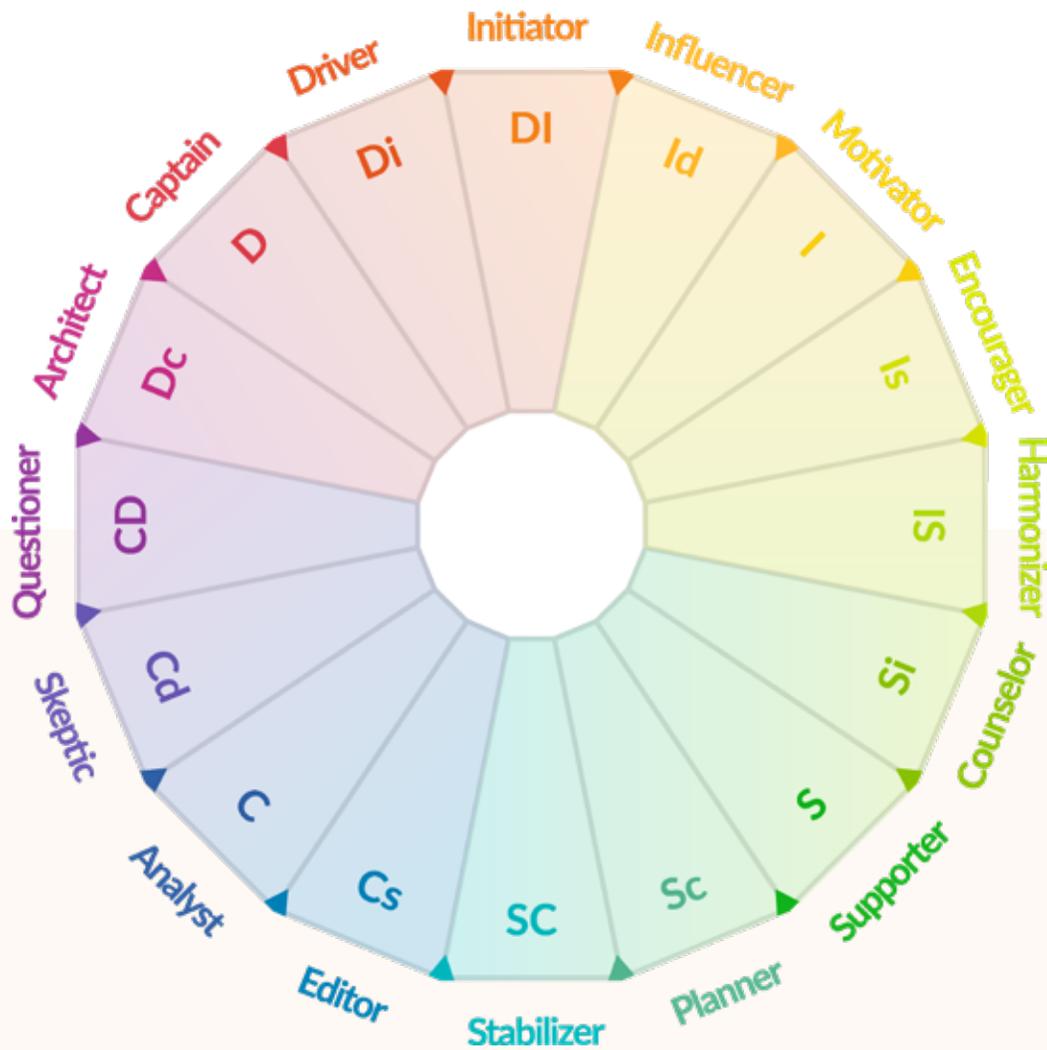
PERSONALITY GRAPH

The Personality Graph is a circular diagram with 16 segments. The segments are labeled with letters: D (Dominant), I (Influential), S (Steady), and C (Conscientious). The segments are color-coded: D is red, I is yellow, S is green, and C is blue. The 'Harmonizer (IS)' type is highlighted in green.



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

These differences are extremely important for your approach in every conversation with a customer. 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 more personal, get-to-know-you conversation. An Analyst (C), on the other hand, tends to enjoy learning more about specific, concrete information. By identifying someone's personality type, we can learn how to best communicate with them.



*Section 2*

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# Building Trust with Empathetic Communication

# BUILDING TRUST WITH EMPATHETIC COMMUNICATION

Establishing and growing trust with clients is incredibly important to your relationship in the long run. Without it, the relationship is likely to eventually fall apart. The best way to create trusting, impactful connections with each customer is by communicating with them in their own, natural style.

*Here are how the four main types like to communicate:*



## D-types

Strong-willed, ambitious D-types are more likely to trust those who can communicate their thoughts clearly. When you disagree with a D-type or need to give them instructions, you need to clearly and concisely communicate what you're saying. D-types tend to have difficulty trusting people who can't be forthcoming about their perspective.

When checking-in with D-types, be direct in offering the necessary, relevant information. Make sure to get things done with speed and efficiency. If they ask for your input, be clear in giving your honest answer.



## I-types

Cheerful, outgoing I-types are likely to trust those who can offer support and encouragement. I-types tend to value conversation and affirmation from others, but may also appreciate valuable, positive advice offered by their account managers.

Check-in with I-types regularly and in-person, when possible. Meeting for lunch or coffee will likely help I-types feel even more excited and comfortable. Offer new ideas or interesting updates when you can and avoid including too many details unless they ask for them.





## S-types

Calm, respectful S-types are likely to trust those who listen intently and encourage them to share their thoughts more openly. S-types tend to value loyalty and support from others. They love engaging in deeper conversations and spending intentional time getting to know someone. Trust with S-types is built over time and with effort, but they are often loyal, devoted clients and customers.

Ask S-types about details from their personal lives when checking in, like how their significant other is doing, if they have pets, or something similar. Show that you care about how they are outside of a professional context. Be quick to help resolve any problems they may be having.



## C-types

Objective, skeptical C-types are likely to trust those who are organized, thoughtful, and avoid pushing them out of their comfort zone too quickly. They value independence and recognition of their skills and contributions. Though they may seem distant, C-types value a trusting, reliable working relationship with their account manager; they just express it differently and are likely to keep to themselves.

C-type clients are likely to appreciate some space, so check-in only when necessary. Be prepared to answer any questions they may have in detail and offer data to back-up your explanation.



Learning to build trust with each client in their own, unique way will ensure that each customer feels understood and valued, which will help you maintain long term trust.



*Section 3*

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# Pairing Account Managers with Clients

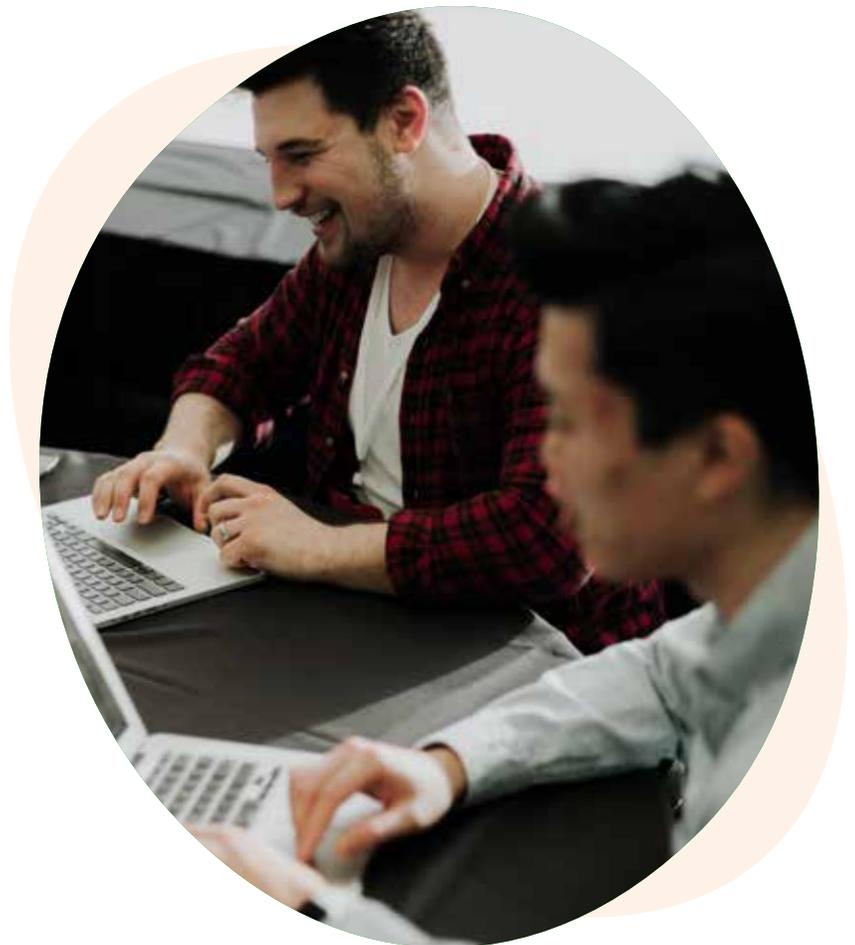
# PAIRING ACCOUNT MANAGERS WITH CLIENTS

One of the easiest ways to ensure each client receives the communication they want is to pair them with a similar personality typed account manager. By creating relationships between clients and account managers that come more naturally for them both, you're likely to ensure that both sides are able to communicate more effortlessly with one another.

## *D-TYPES AND C-TYPES*

Because they are so naturally similar, D-type and C-type clients are likely to establish good working relationships with either a D- or a C-type account manager. D-types are generally dominant, logical personalities who enjoy leading other people to success by working in a focused, productive way. C-types tend to be reserved, analytical people who prefer remaining completely objective when making decisions and following rules, processes, and structures.

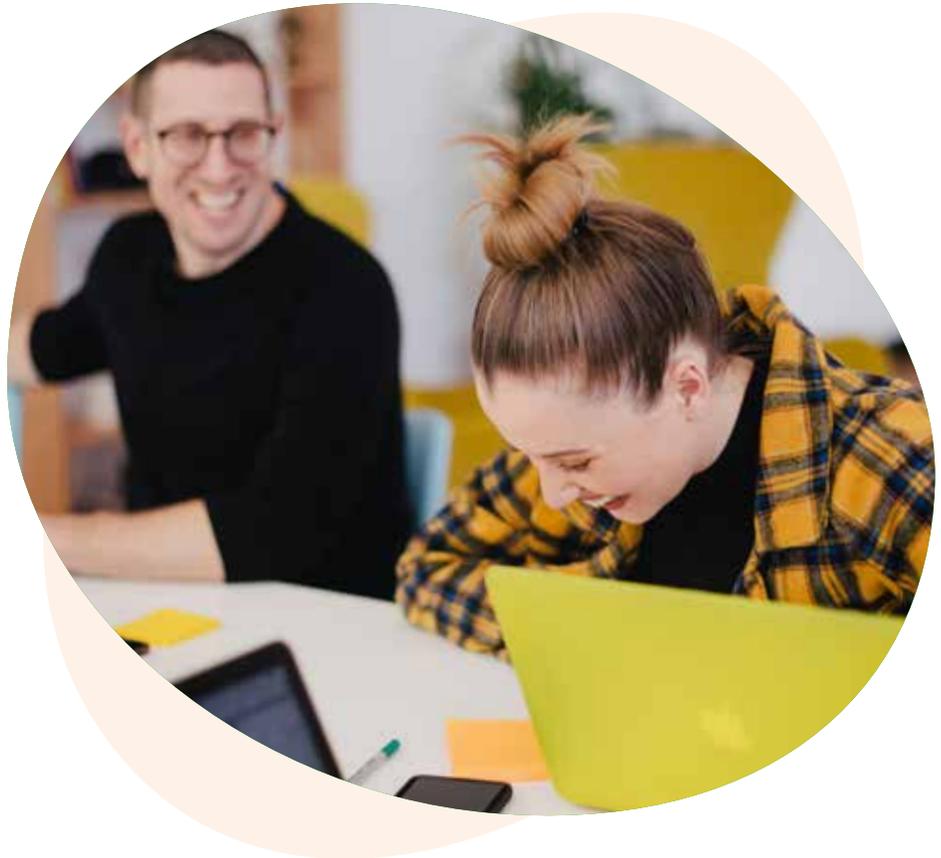
However, they both tend to communicate in a similarly direct, honest tone and only as needed. Both personalities are likely to speak with clarity and precision, which can benefit their relationship with each other and reinforce the necessary trust. It's important, though, that a C-type account manager avoids being overly detailed or exacting with a D-type customer, while a D-type account manager should avoid rushing a C-type client.



## I-TYPES AND S-TYPES

I-type and S-type customers are more likely to feel comfortable when paired with similar I- and S-type account managers. I-types tend to be enthusiastic, open-minded people who enjoy meeting new people and avoiding strict schedules or rules. S-types are usually more reserved, calm, patient personalities with a passion for building deeper connections with others and methodically working through problems.

Both I-types and S-types tend to communicate in a warm, empathetic way. They each tend to appreciate building personal connections by sharing about their own lives. They are both likely to appreciate regular interaction and communication, as well. However, I-type account managers should avoid pushing S-type clients out of their comfort zone, while S-type account managers should avoid shutting down an I-type customer's ideas.



By placing account managers and customers together based on personality, you can establish working relationships that are easier for everyone to maintain. Communication is likely to come more naturally to these pairs, which can help both sides feel more comfortable and confident. Customers will stay around longer and account managers will stress less at work.



# KEEP CUSTOMERS HAPPY

Building customer relationships is an important, but difficult, part of account management. Luckily, there are tools that can help make your job easier. By using Personality AI to understand your customers' personalities, adapt your communication, and maintain strong, trusting relationships, *you can ensure that your clients stay loyal, devoted customers for the long haul.*



# 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.



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