THE POWER
OF PERSONALITY

A comprehensive look at Personality-Based Marketing
WHAT IS PERSONALITY-BASED MARKETING?

HOW PERSONALITIES INTERACT THROUGH THE BUYER JOURNEY

USE CASES

THE APPLICATION AND IMPACT OF CARBON QUADRANTS

ADDITIONAL RESOURCES
It started with a simple question: why hasn’t B2B sales and marketing performance improved? Despite advances in strategy and the industry’s massive investment in technology, the needle simply hasn’t moved over the last 10 years or longer.

Our curiosity led us to investigate this performance challenge. We noticed that our tools - mostly glorified task lists and activity trackers - were only picking up on rational factors.

So we started to explore what wasn’t being tracked and discovered a “hidden buyer journey”. As we explored buyer behaviors, motivations, and personality types, we found that purchase decisions made by buying groups were driven by individuals’ personal motivations, not titles or roles.

For two years now, we’ve been using research on buying groups and AI-enabled Personality-Based Marketing to help clients improve their sales and marketing efforts. This eBook shares our insights and how you can apply Personality-Based Marketing to improve your B2B marketing performance - at last.

"Titles and roles don’t drive behavior, personality does."

Scott Gillum | Founder & CEO, Carbon Design
PBM IS THE NEXT LEVEL OF ABM

Creating and executing highly personalized programs for individual accounts

Creating and executing lightly customized programs for clusters of accounts with similar issues and needs

Leveraging technology to tailor and personalize marketing campaigns for specific named accounts at scale

Source: DemandBase

ONE-TO-ONE ABM

ONE-TO-FEW ABM

ONE-TO-MANY ABM

TRUE ONE-TO-ONE

Creating and executing highly personalized programs for individual buyers
Our approach to personality-based marketing (PBM)

We combine insights from AI-personality profiling tools with market research to improve performance.

**Step 01: Assessment**
- Customer list
- Marketing list
- Nurturing campaigns
- Customer makeup
- Assess marketing material

**Step 02: Run AI Analysis**

**Step 03: Match Attributes with Personality Profile**

**Step 04: Define Role in Buying Group**

**Step 05: Assess Closed Deals**

**Step 06: Apply to Situation**
THE BUYER JOURNEY IS GUIDED BY PERSONALITY

THE CORE FOUR

Although Gartner says that the average size of the decision making group is now 17, only 4 distinct personalities exist.

WHY THEY MATTER

3 of the 4 personalities can help start and/or advance the buying process, and 1 can stop it in its tracks.
4 PERSONALITIES IN THE BUYING GROUP

One type of personality is most likely to start the process, another is most likely to advance it, while another is likely to take the deal apart.
But the most important piece is how they interact through the buyer journey.
THAT'S WHERE WE COME IN

We’re evolving from tracking individual behaviors to watching the behavior of individuals working together.

Titles and roles don’t predict behavior. Some executives like to engage with sales, some prefer to avoid them. Some like to research deeply, others want shorter stories. And this occurs at all levels of the org. This is a core idea of Mobilizer - different people can drive decisions and it often has little to do with the title and role. Scott feels marketing is broken and the driver is that we try to market to titles and roles instead of personalities. It’s a big bet.

Hank Barnes
Chief of Research, Buying Behavior, Gartner
CASE STUDY 01:
UNDERSTANDING HOW PERSONALITIES WORK IN BUYING GROUPS

SITUATION
- A CEO-to-CEO conversation (peer to peer) kicks off the buyer journey.
- Buyer Motivation: Transition from outsourced vendor solution to inhouse capability.

PBM INSIGHT
Personality type 1 (CEO & CMO) brings information into an organization but will seek others to move it forward. Personality type 2's (VP, SVP, and Procurement) are the drivers inside organizations, especially if it benefits them personally.

MARKETING ACTION
When targeting C-Level decision makers, track who they bring into meetings and/or forward information to because they will be the “owners” of the buying process.

Sales process starts with a CEO to CEO Zoom call.
CEO invites CMO to meet with the vendor. CMO invites SVP and VP of RD to attend.

VP and SVP find an area to test pilot. The deal took 15 months to close after the initial CEO to CEO meeting.

Contract & process invoice from CMO's budget.

CEO CMO

VP OF RD SVP

PROCUREMENT
CASE STUDY 02:
UNDERSTANDING PERSONALITIES IN THE PURCHASE DECISION

SITUATION

• High engagement activity over a 20 month sales process
• Buyer Motivation: Reduce risk of making a bad purchase decision

PBM INSIGHT

Personality type 3 will enter late into the process and will look to reduce risk by unbundling solutions, which often results in a lower price.

MARKETING ACTION

Proactively intervene, address risk issues, provide references, and adjust the revenue forecast downward.

For 7 months members of the Executive Director's team did research on the company and the solution they eventually purchased. The Executive Director entered during the last month and took apart the solution reducing the solution value from $350K to a closed deal worth $150K.
CASE STUDY 03:
USING PERSONALITIES FOR ABM STRATEGY

SITUATION
Grow largest account by understanding personality preferences and behaviors.

PBM INSIGHT
Customize approach and outreach based on customer’s unique personality preferences.

MARKETING ACTION
Create personalized outreach plan, load personality types in Salesforce and align client team.

Provide new insights that can be shared with their team.

Share short form high visual content - video, infographics.

Share internal information that could help them advance their careers or gain recognition.

Leverage influencer group, present proof point and ROI.
WHERE CAN YOU APPLY CARBON QUADRANTS?

TARGETING
Eliminate prospects who won’t respond by targeting the right personalities to improve list performance

BUYER PERSONAS
Create more actionable personas by including the 4 personality types

LEAD GENERATION
Gain insight into which prospects have the best probability to convert

LEAD NURTURING
Align the right resources to the highest quality leads to optimize resources

CONTENT DEVELOPMENT
Build content that meets the unique needs of different audiences and increases campaign asset performance

CONTENT MARKETING
Learn how to put the right type of content in front of the right audience consistently

BUYER JOURNEYS
Understand who is motivated to start and drive the buying process to shorten the sales cycle

ACCOUNT-BASED MARKETING
Go beyond titles to engage the contacts who actually make things move within the account
THE PROOF IS IN THE IMPACT

**Improved list performance** by up to 30% through elimination of prospect personalities who won’t respond.

**Reduced cost** for lead nurturing programs by aligning the right resources to the highest probability prospects.

**Increased campaign asset performance** by customizing content and design to meet the unique needs of different audiences.

**Shortened sales cycles** by better understanding who is motivated to start and drive the buying process.
Learn more about how personality - not titles and roles - drives behavior

Click the icons below

- Get the what and why of personality-based marketing
- Meet the 4 buyer personalities that help convert your B2B sales
- Learn how to get a better return from ABM
- Understand how ‘false positive’ personality types disrupt B2B intent data
- Discover how AI profiling is uncovering 3 drivers of poor campaign performance
- Learn why we’re betting big on personalities and behaviors in B2B
- Understand what marketers should know about personality-based marketing
- Watch how to build your personal brand and become a trusted advisor using personality profiling
CONTACT US
TO EXPLORE USING PERSONALITY TO POWER THE BUYER JOURNEY

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