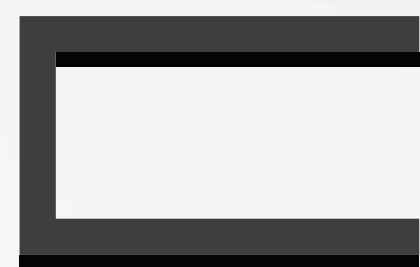




CARBON  
**Quadrants**

# THE POWER OF PERSONALITY

A comprehensive look at  
Personality-Based Marketing

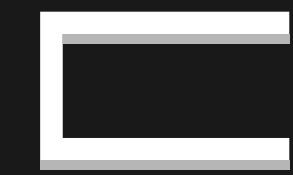


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# OVERVIEW

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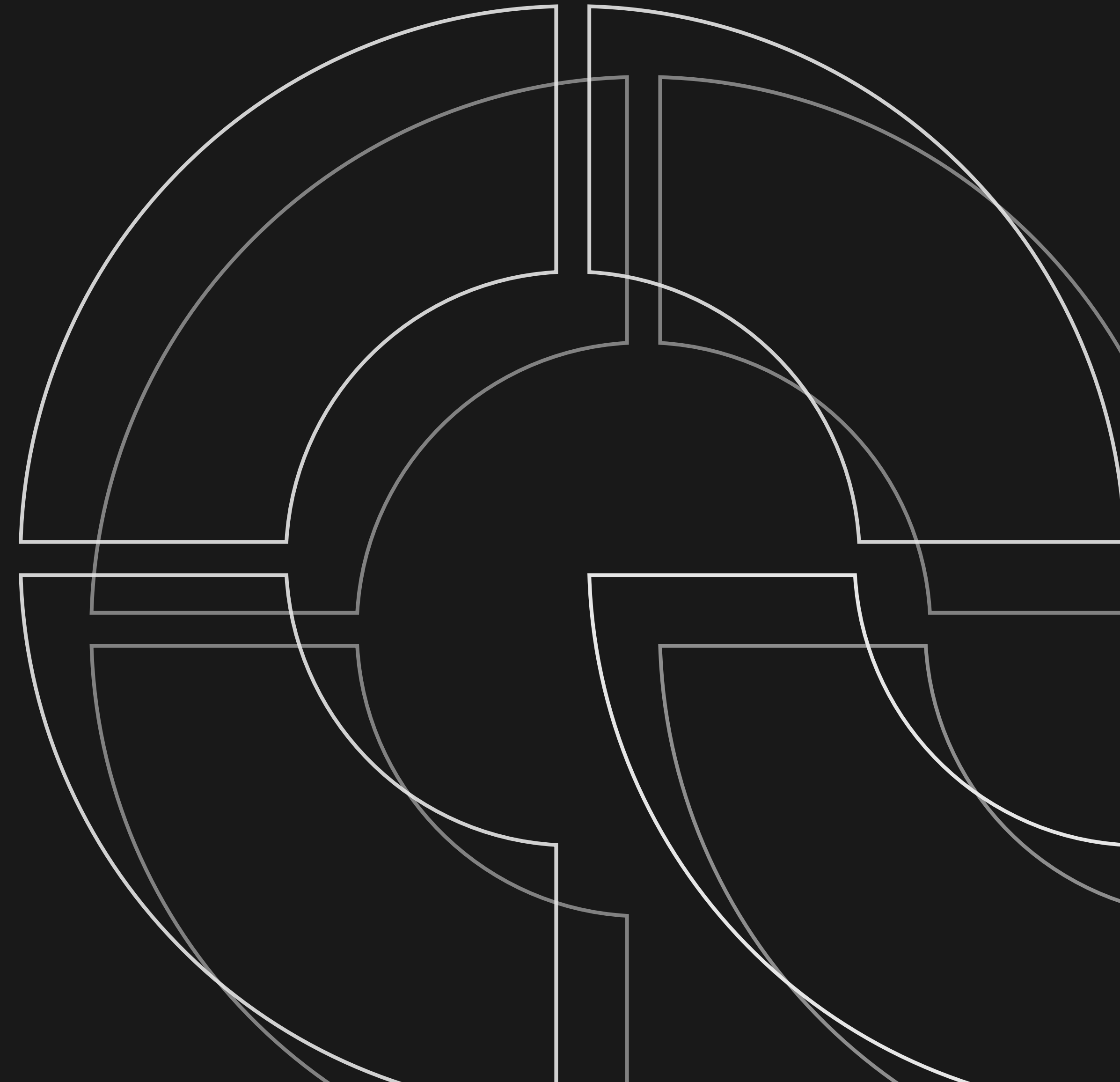
**1** WHAT IS  
PERSONALITY-BASED MARKETING?

**2** HOW PERSONALITIES INTERACT  
THROUGH THE BUYER JOURNEY

**3** USE CASES

**4** THE APPLICATION AND IMPACT  
OF CARBON QUADRANTS

**5** ADDITIONAL RESOURCES





# A NOTE FROM THE CEO

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."

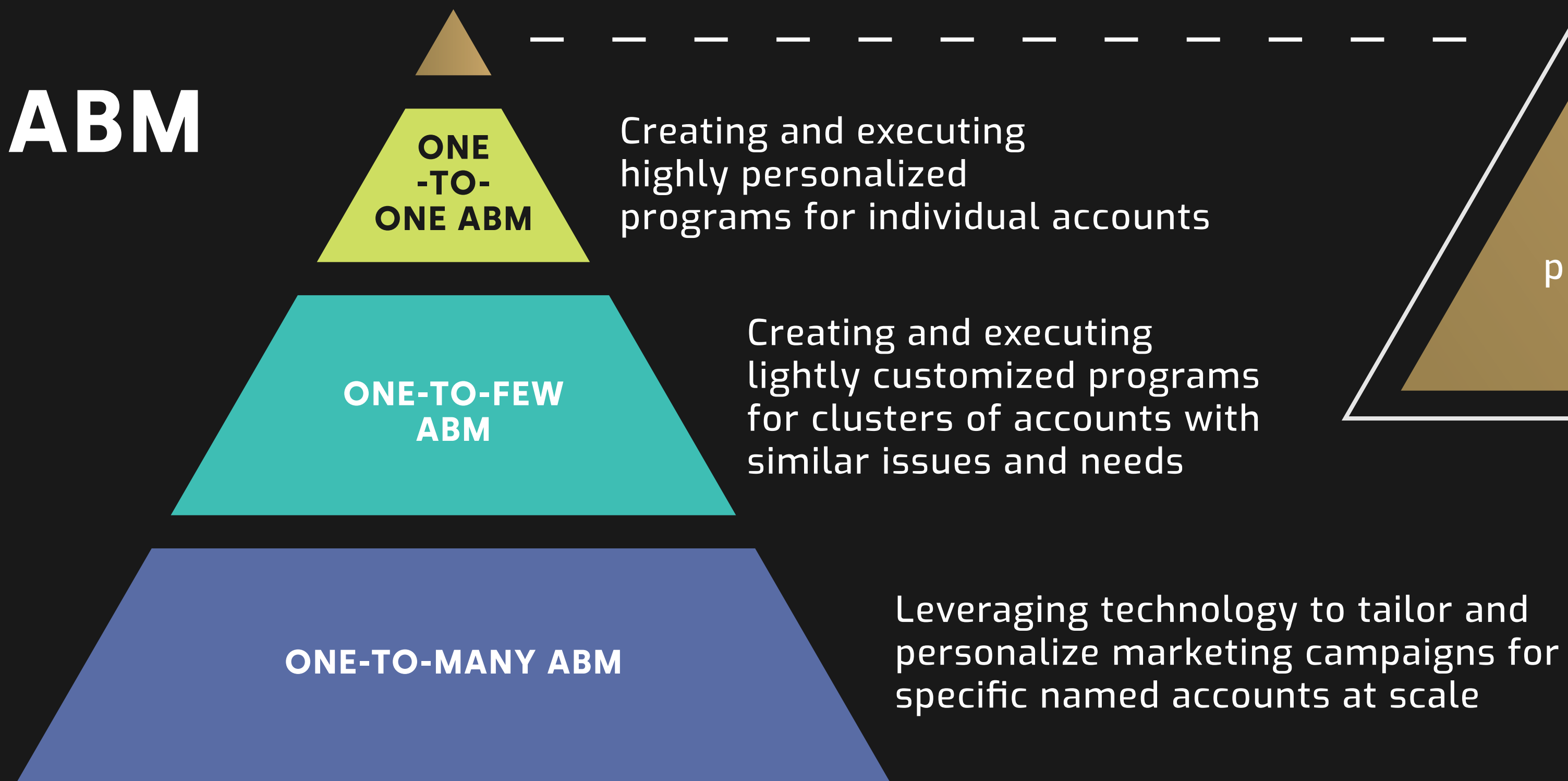
**Scott Gillum** | Founder & CEO, Carbon Design



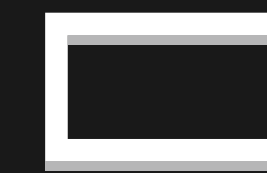
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# PBM IS THE NEXT LEVEL OF ABM

## ABM



## PBM



# OUR APPROACH TO PERSONALITY-BASED MARKETING [PBM]



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

01



## STEP 01: ASSESSMENT

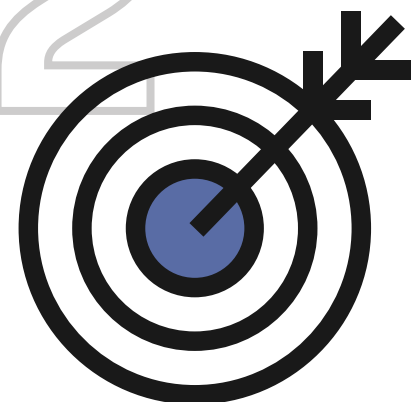
- Customer list
- Marketing list
- Nurturing campaigns
- Customer makeup
- Assess marketing material

04



## STEP 04: DEFINE ROLE IN BUYING GROUP

02



## STEP 02: RUN AI ANALYSIS

05



## STEP 05: ASSESS CLOSED DEALS

03



## STEP 03: MATCH ATTRIBUTES WITH PERSONALITY PROFILE

06



## STEP 06: APPLY TO SITUATION



# THE BUYER JOURNEY IS GUIDED BY PERSONALITY



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## THE CORE FOUR

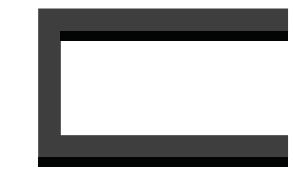
Although Gartner says that the average size of the decision making group is now 17, **only 4 distinct personalities exist.**

## 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

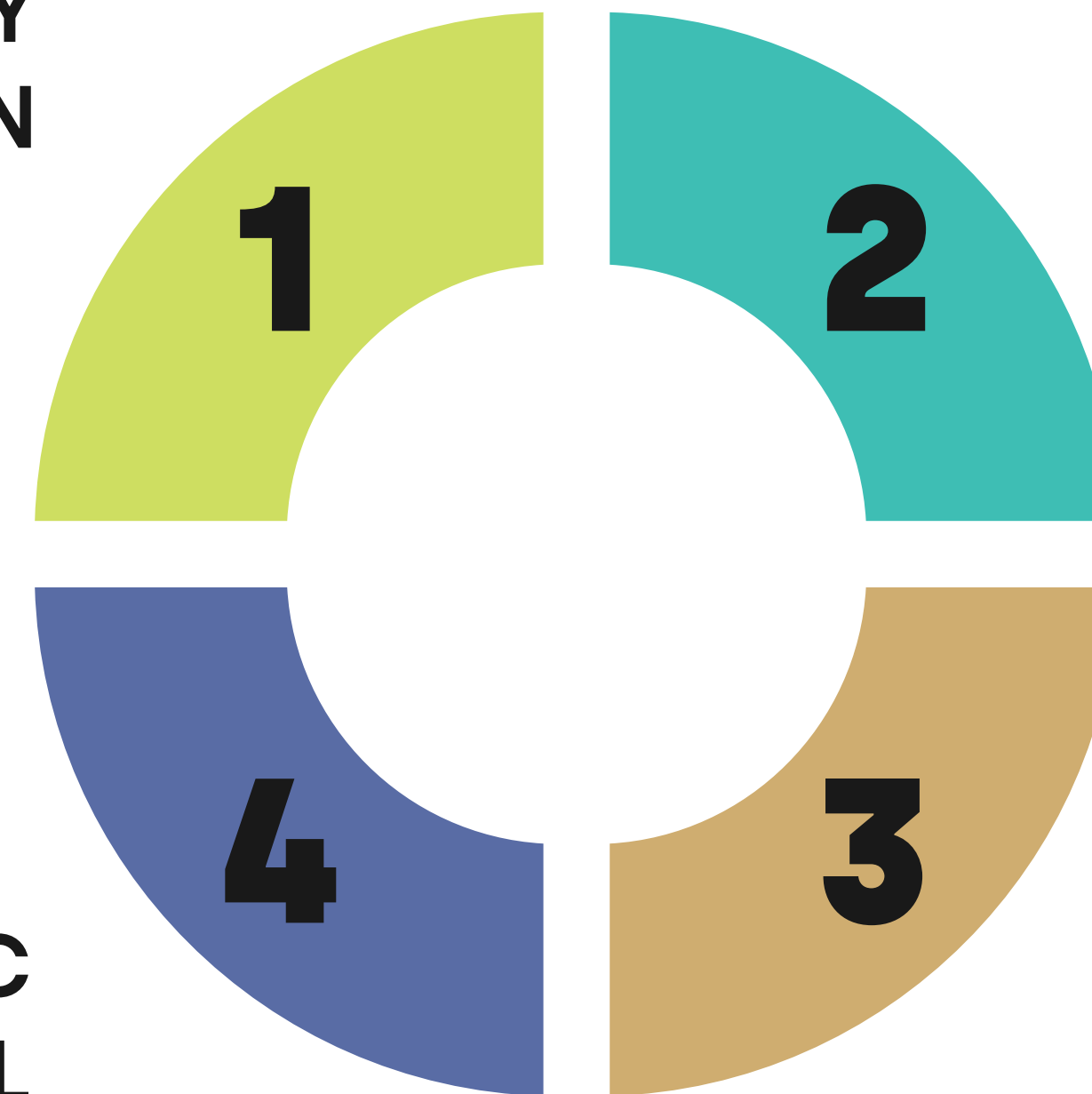


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One type of personality is most likely to start the process, another is most likely to advance it, while another is likely to take the deal apart.

**SEEKER  
VISIONARY  
OUT-SPOKEN**

**DOER  
CHAMPION  
RESULTS-DRIVEN**



**SKEPTIC  
DOUBTFUL  
HESITANT**

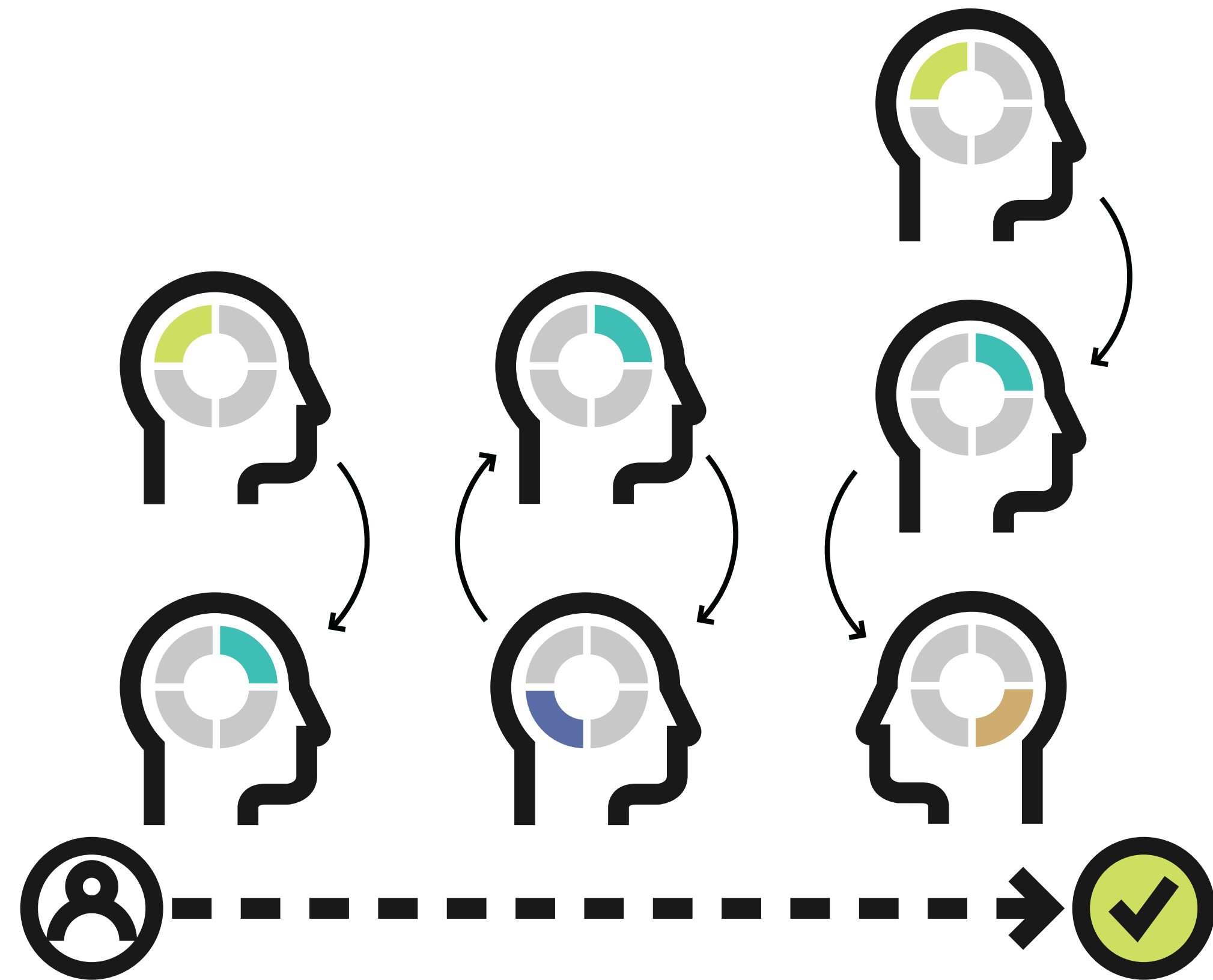
**FRIEND  
STEADY  
SUPPORTIVE**

BUT THE MOST IMPORTANT PIECE IS HOW THEY  
INTERACT THROUGH THE BUYER JOURNEY

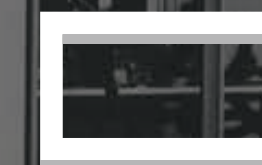
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# THAT'S WHERE WE COME IN

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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



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# 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.

#### START

Sales process starts with a CEO to CEO Zoom call.



CEO



CMO

CEO invites CMO to meet with the vendor. CMO invites SVP and VP of RD to attend.

#### ADVANCE

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



VP OF RD



SVP

#### CLOSE

Contract & process invoice from CMO's budget.



PROCUREMENT

# CASE STUDY 02:

## UNDERSTANDING PERSONALITIES IN THE PURCHASE DECISION



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### 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.

#### START



WEBINAR



DOWNLOAD



VIRTUAL EVENT



EMAIL OPEN

#### ADVANCE



DOWNLOAD



VIRTUAL EVENT



EMAIL OPEN



WEBINAR

#### CLOSE

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.



EXECUTIVE  
DIRECTOR



# CASE STUDY 03:

## USING PERSONALITIES FOR ABM STRATEGY



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### SITUATION

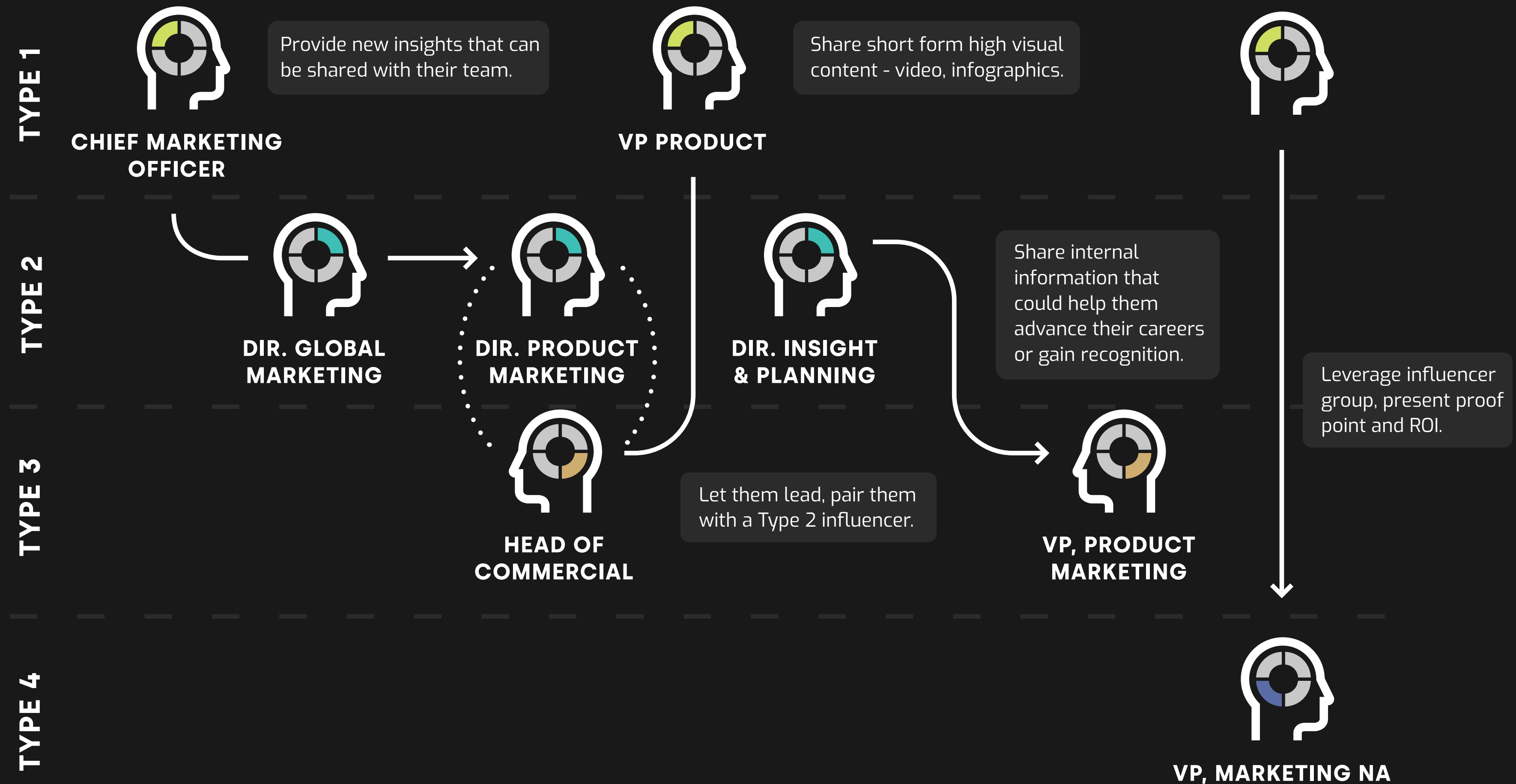
Grow largest account by understanding personality preferences and behaviors.

### PBM INSIGHT

Customize approach and outreach based on customer's unique personality preferences.

### MARKETING ACTION

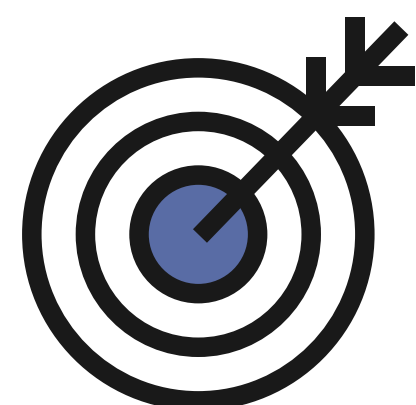
Create personalized outreach plan, load personality types in Salesforce and align client team.



# WHERE CAN YOU APPLY CARBON QUADRANTS?

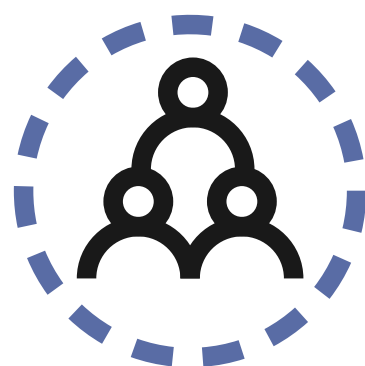


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## TARGETING

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

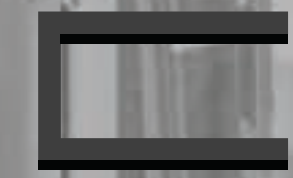


## ACCOUNT-BASED MARKETING

Go beyond titles to engage the contacts who actually make things move within the account



# THE PROOF IS IN THE IMPACT



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**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



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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 personality 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



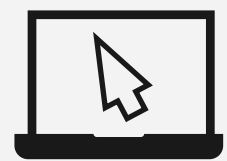
Watch how to build your personal brand and become a trusted advisor using personality profiling

# CONTACT US

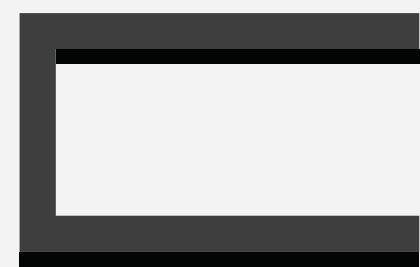
## TO EXPLORE USING PERSONALITY TO POWER THE BUYER JOURNEY



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[www.carbondesign.com](http://www.carbondesign.com)



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