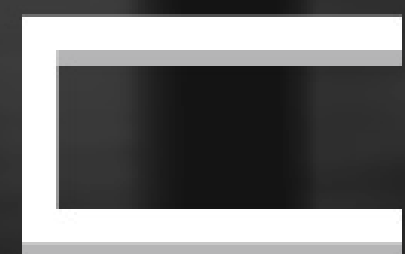


# PERSONALITY-BASED MARKETING INSIGHTS

Understanding Online and Offline Behavior  
to Identify Real Buyers and Influencers



CARBON  
DESIGN

OVERVIEW \ \

INTRO + APPROACH →

---

UNDERSTANDING BEHAVIORS →

---

WHAT THAT TELLS US ABOUT ONLINE BEHAVIOR →

---

WHAT TO LOOK FOR IN YOUR DATA →

---

# ABOUT THE INSIGHT \

Over the last five years, we have studied the personality traits of buyers uncovering how their behaviors and motivation impact their online behaviors. From their we know what their true intentions are and how to use that insight to better align with their preferences for information. The insight allows us to create true personalization at scale.

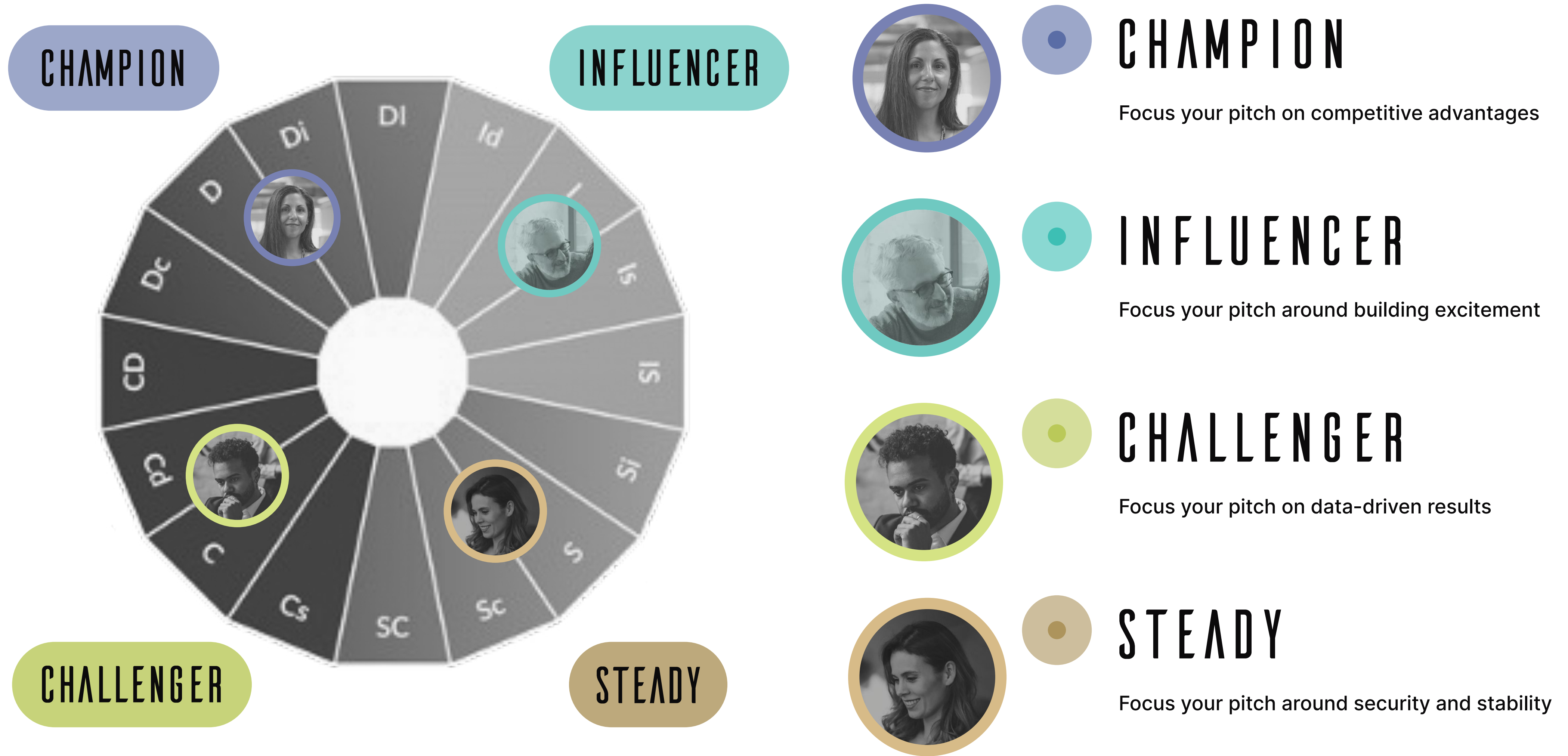
"TITLES AND ROLES  
DON'T DRIVE BEHAVIOR.  
PERSONALITY DOES."

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





# TOP SELLERS ADAPT THEIR APPROACH TO DIFFERENT BUYERS \\\



# PEOPLE HAVE DIFFERENT MOTIVATIONS & BEHAVIORS \\\

## CHAMPION

Ambitious  
Action oriented  
Champions ideas

## CHALLENGER

Data driven  
Naturally skeptic  
Often SME

## INFLUENCER

Big ideas  
Idea generator  
Leans on others

## STEADY

Team player  
Risk averse  
Likes to be liked



# WHAT IS INTENT DATA? \ \

Zoominfo describes **intent data** based on signal strength.

**“Derived intent** signals are a mix of first-party and third-party signals. These offer insights into **behaviors** that **indicate interest** in a company, such as ad engagement, web activity, topic engagement, and technology use.”

As a result, we have a tendency to think of this as a MQL, from Zoominfo:

**“Identify interest: Purchase-intent signals** help identify which companies are actively researching your solution before they fill out a form on your site or engage with your sales and marketing teams.”

# REAL ENGAGEMENT \

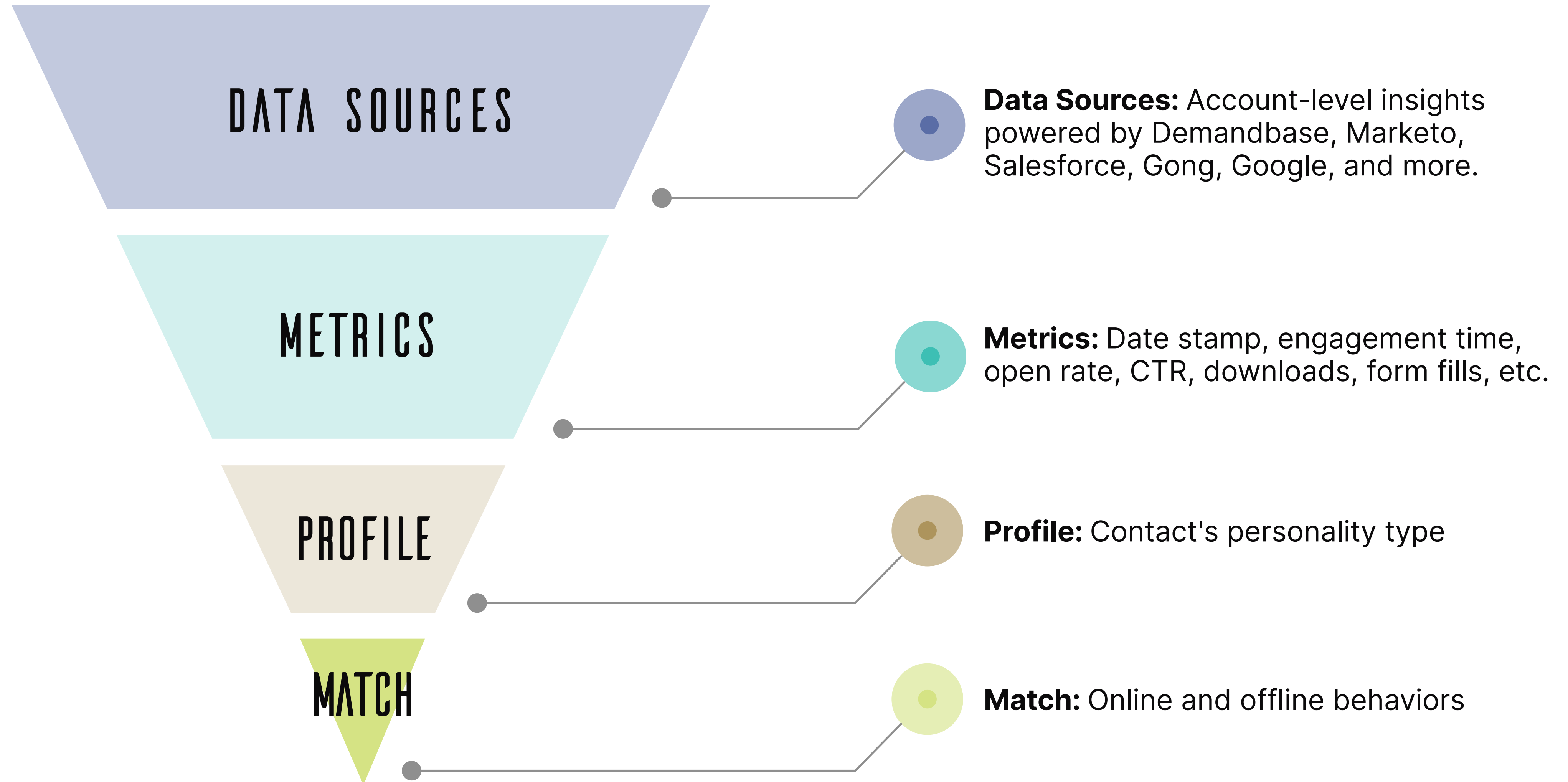
REQUIRES KNOWING THE BEHAVIOR OF THE PERSON AND WATCHING IT OVER TIME.

THERE ARE PLENTY OF INSIGHTS THAT CAN BE GAINED AND RARELY DOES IT INVOLVE TRUE PURCHASE INTENT.





# HOW TO FIND SIGNALS IN YOUR ABM DATA \ \





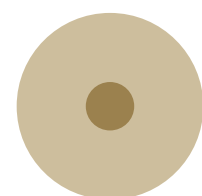
THIS IS WHAT YOU'LL FIND \\\



# 01 THE FALSE POSITIVE

This a real example of an existing customer who is the key contact of the account. Sales is trying to upsell the client.

Title	Date	Action
Senior Dir.	01/15	Email open
Senior Dir.	02/22	Webinar registration
Senior Dir.	03/30	Form fill
Senior Dir.	05/01	Email open
Senior Dir.	06/20	Call
Senior Dir.	08/24	Event registration
Senior Dir.	09/12	Email open



The contact and engagement activity above would indicate a highly engaged contact.



STEADY

PERSONALITY TRAITS //

Passive  
Blocker  
Sensitive


However, if you then profiled the personality type you would realize that this person is not a good fit for sales interaction. They are passive participants and will not advocate for the company or its solution.

# 02 THE MISSED OPPORTUNITY

This is a real example of a senior executive who is not part of the buying group but is on the mail list.

Title	Date	Action
Senior VP	01/15	Email open
Senior VP	01/15	Email open
Senior VP	01/15	Email open
Senior VP	01/15	Email open
Senior VP	01/16	Email open

The email invite was opened 12 times over a 3 day period. A likely sign of forwarding it to team members.



PERSONALITY TRAITS //

Active  
Learner  
Teacher

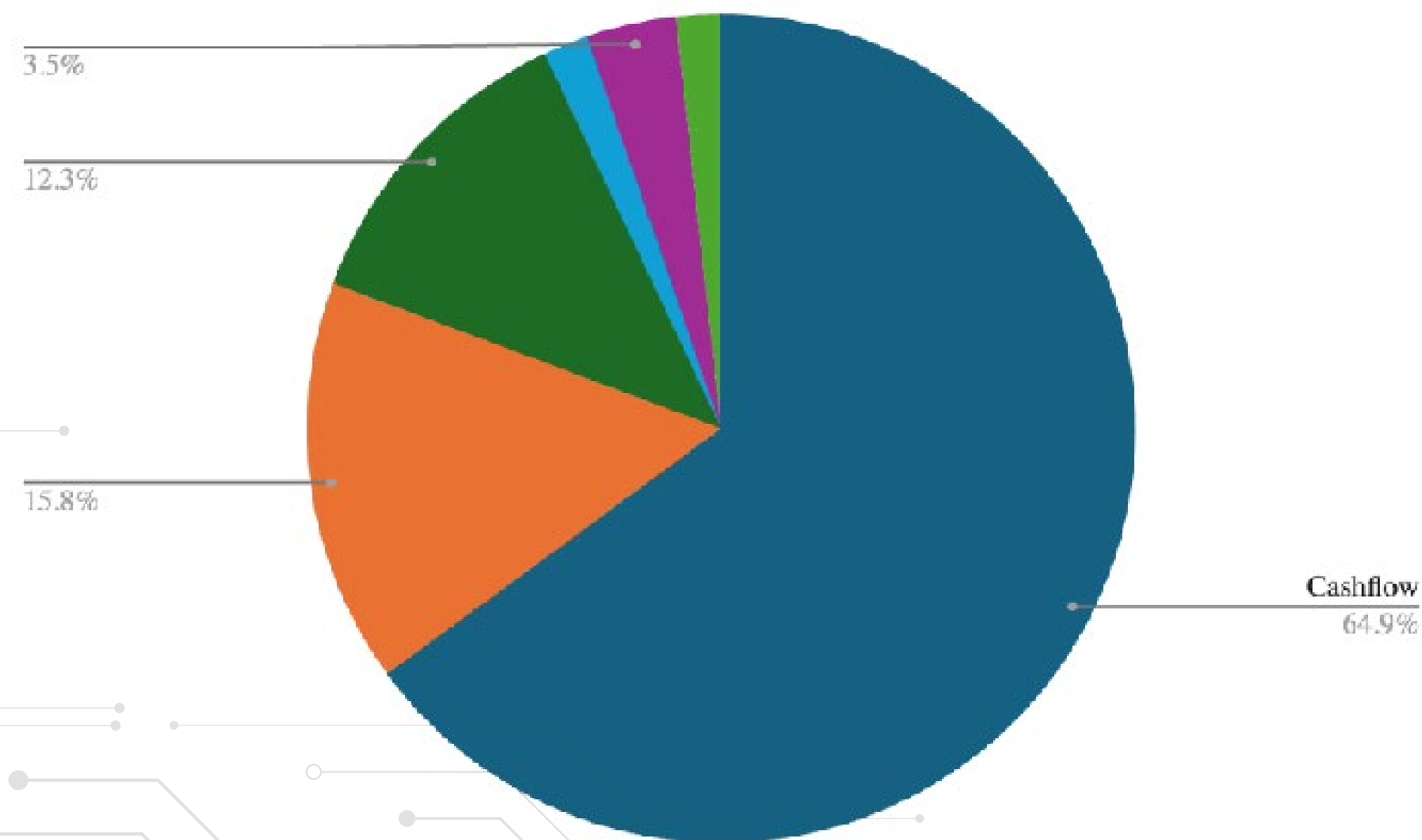
INFLUENCER

Profiling the personality type you would realize this is an important content router. More importantly, because of her title and role, she lends credibility and importance to the vendor's content increasing the chances that it will be opened and viewed by others.

# 03 TRUE SIGNALS

Using keyword search and intent over a period of time can provide insight into a buyer's issues, needs or concerns.

## Demandbase Keyword Search & Intent



When intent signals are paired with personality traits true insight can be discovered. In this example, the CEO of a prospective account is actively searching for information related to cash flow.

Our client had a final pitch presentation in two weeks. As a result, we reworked the presentation theme to focus on improving financial performance, in particular, cash flow. They won this competitive account.



# WHAT WE DO \ \

Our network of top talent spans a wide range of disciplines, enabling us to approach projects from all sides and uncover the most efficient path forward.



- Personality Based Marketing
- AI enabled Personality profiling
- Personas + Buyer Journeys
- Content Audits
- Content templates
- Campaign design



- Research
- Positioning
- Messaging
- Value Prop
- Brand Story



- Behavior Based Selling
- Enterprise ABM
- Group dynamics
- Coaching



CARBON  
DESIGN

- Corporate identity / Logo design
- Brand System development
- Content design / development
- Website design / development
- Digital assets campaigns





# INSIGHTS LOVED BY SALES \\\

“We won the deal because the customer said we knew them better than the competition.”

“I can't believe how accurate you are about our account contacts and you've never met them!”

“Overall this is super helpful, I think, really being able to dig deep into the who/how we communicate with them. Doing this at scale would be huge.”



# FOR MORE INFORMATION \ \



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Continue your learnings about  
Personality Based Marketing.

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