

Case Study

How The World's Most Valuable FinTech Firm Pioneered Personalization At Scale

By leveraging personality AI for its outbound sales motion, the company shortened its sales cycle by 36% and accelerated its new-market expansion.

About The Company

The client is the world's most valuable financial technology company and a pioneer in the industry. It enables online payments in most countries that support online banking and monetary transactions.

About The Team



The B2B Database Marketing team at the company is responsible for formulating and executing the lead generation and pipeline development strategy for the firm across the globe. It builds the infrastructure that enables its SMB, mid-market and enterprise sales teams in their new customer acquisition goals.

The Objective

The B2B Database Marketing team typically gathers lead data from multiple sources. It evaluates and scores these leads using a combination of internal rules as well as Machine Learning algorithms. It also collaborates with partners and information providers to ensure that it can build a robust pipeline for the sales organization.

In 2021, as part of a sales transformation initiative, it identified the use of data analytics and AI as a major thrust area to attract new customers and improve sales conversion. Understanding potential customers' buying behavior and personality was recognized as a key element that would provide a competitive advantage to its sales and marketing teams.

The Challenge

The company zoomed into 'account intelligence' and 'personalization' as two primary domains, leveraging which it could accomplish its objectives.

After further analysis, the team identified that personalization at scale was going to be a key lever to set its sales force up for success. Achieving such a feat would make a noticeable difference throughout the sales process: from pipeline generation, prospect engagement, relationship-building, right up until deal closure.

However, until that point, personalization at scale was a misnomer. There were tools that helped salespeople personalize their one-on-one interactions. However, for the company, and particularly its B2B Database Marketing team, a one-on-one personalization tool was theoretically helpful but practically of little use because it was unscalable.

It therefore turned to Humantic AI and its easy-to-use APIs to bring next-generation buyer insights and personalization at scale to its sales teams.



The Solution

For personalization that could work at scale, the company zeroed down on the use of personality AI and therefore Humantic AI. Humantic AI's Buyer Intelligence suite includes Personality AI as well as a robust buyer insights capability that can tip the scales for multi-million dollar deals.

Personality AI allows salespeople to understand their buyers at a deep, human level before they even meet them. It can help revenue teams understand – at scale – what motivates their buyers, what drives them to make decisions, and exactly what landmines must be avoided at all costs when dealing with them.

Early in 2021, the company launched a trial programme with Brazil as the primary market. The B2B Database Marketing team divided the sales force into two teams: one that would communicate with prospects using personality insights (the treatment group) and another that would carry on as before, without incorporating personality insights (the control group).

Additionally, a simple workflow was created to verify the effectiveness of the treatment group's approach: their prospects' personality data would be forwarded through an open comment field in the lead object. Salespeople assigned to the lead would then use these insights across email, virtual meetings, and in-person conversations to adapt their sales messaging to fit their prospect's personality at every step of the sales process.



Thanks to actionable personality insights, the company's salesforce was now able to interact with buyers in a significantly more effective way - from cold calls to email drip campaigns, from discovery calls to negotiations, from relationship building to deal closures.

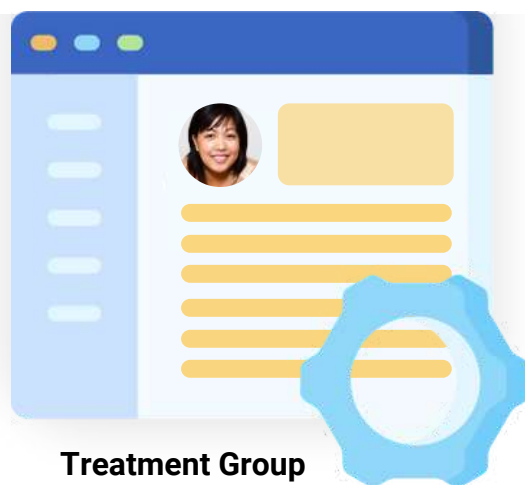
The Solution



**Control Group
Without Personality Data**

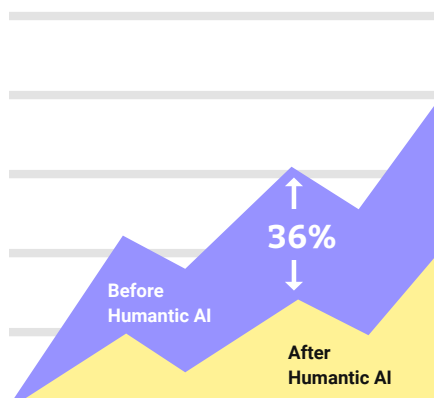
Among the two groups of salespeople divided by the company to measure the effectiveness of this pilot, the 'control' group continued to interact with their buyers the old way, using existing tools and processes.

On the other hand, the 'treatment' group would interact with buyers using personality insights from Humantic AI. This was facilitated by a workflow which captured Humantic AI's personality data into their CRM's lead object.



**Treatment Group
With Personality Data**

**Time to first
engagement**



No. of touch points

When the results of the two groups were compared, it was apparent that the treatment group performed better than the control group on every front. The team was particularly impressed with the 36% improvement in 'time to first engagement', an important KPI in new-market expansion.

Impact And Future Plans

★ At the end of the 3 month pilot, a clear difference was visible in the results for the 'treatment' group. **Time to first engagement**, a crucial KPI for the team, had accelerated by a whopping **36%** in the short timeframe compared to the 'control' group.

★ A sizeable difference in this KPI within just one quarter was sufficient validation for the company to roll out Humantic AI enabled personalization globally. It zeroed down on the use of Humantic AI APIs to ensure that during the full rollout, personalization could be enabled programmatically at scale and not just 1-1 manually, as was done during the pilot.

★ Humantic AI's API functionality thus paved the way for the team to realize personalization at scale – going against the then-prevalent myth that authentic personalization can only happen one-on-one.

Since then, the company has started rolling out Humantic AI across its global teams. It has also enhanced how sales teams use Humantic AI - from using it only for message personalization, it now uses Humantic AI even to decide which of its products should be pitched to every new prospect. For instance, a risk-averse prospect might be pitched its fraud prevention product

whereas a social and customer-oriented prospect might be pitched its checkout experience product. Personalization at this level had been unimaginable earlier.

In the future, the firm also plans to start using 'personality compatibility score' for assignment of leads to salespeople to establish optimal seller-buyer match.



About Humantic AI

Humantic AI provides buyer intelligence to revenue teams. It ensures that sellers always know their buyers before they meet them.

Humantic AI's technology is anchored around its proprietary personality AI engine, which combines ML & NLP with Neuroscience to create detailed personality profiles of the buyers. These profiles provide recommendations to sellers to help them personalize every interaction with their buyers at every step of their buying journey.

Its customers include companies like Appian, Rackspace and McKinsey. They see **significant change in response and win rates** when they adopt buyer intelligence by Humantic AI.

It delivers a new way for sales and marketing teams to understand their prospects and deliver authentic personalization like it's never been possible earlier.



Speak to an expert: learn what personality AI can do for you

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QUARTZ

THE VERGE

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