



Crystal 

+

First Citrus  Bank

INCREASED CONVERSION RATES AND STRONGER ENGAGEMENT

CASE STUDY: First Citrus Bank

First Citrus Bank, a \$600MM commercial bank ranked as a Top 100 Community Banks, has been a Crystal customer since 2020. As a commercial bank offering a variety of financial services, First Citrus uses Crystal to help increase conversion rates and develop long-term relationships with business owners.

FIRST CITRUS BANK

The bank invests heavily in sales training and encourages “meeting people where their clients are, not where you are”. Crystal’s personality insights allow reps to put this philosophy into practice and reinforce their skills with every customer conversation. Before meeting with prospects, sales reps typically create “pre-call packages” to prepare for their client meetings. Personality predictions from the Chrome Extension give practical insights and tips for communicating with prospects who may have different behavioral styles, motivations, and preferences.

Quick Facts about First Citrus Bank

- \$600MM commercial bank
- Headquartered in Tampa, FL
- Ranked in Top 100 Community
- Financial services
- Crystal customer since 2020

Let’s take a closer look...

USING CRYSTAL FOR PRE-CALL STRATEGY SESSIONS

When planning a call or meeting, it’s important to consider the following three questions:

What do they want?

Why do they want it?

How do they want to interact?

By thinking in this way, you’re setting yourself up for effective, empathetic communication. By using DISC to understand a person’s personality and communication style, you can personalize your approach to easily navigate through calls and meetings with any personality type.

Here’s a breakdown of the different DISC types, and an overview of best practices to consider when developing your meeting strategy:

DISC TYPE	DO	DON'T
<i>D Personality Types</i>	<ul style="list-style-type: none"> • Get to the point of the conversation • Ask direct questions • Address certain competitive advantages 	<ul style="list-style-type: none"> • Engage in small-talk • Be passive or reserved • Let the call or meeting run past its scheduled time
<i>I Personality Types</i>	<ul style="list-style-type: none"> • Utilize visual aids when possible • Engage in small-talk and build rapport • Remain enthusiastic and empathetic 	<ul style="list-style-type: none"> • Speak in a serious tone • Involve too many details • Schedule far in advance
<i>S Personality Types</i>	<ul style="list-style-type: none"> • Ask questions about how they're feeling • Thank them for their time • Maintain a warm tone 	<ul style="list-style-type: none"> • Be blunt or forceful • Require an immediate decision • Forget to engage in friendly, casual conversation first
<i>C Personality Types</i>	<ul style="list-style-type: none"> • Provide evidence and data to support claims • Use business-like language and tone • Communicate the most important details beforehand in writing 	<ul style="list-style-type: none"> • Interrupt or change the subject • Make claims that you can't support • Involve unnecessary small-talk

By being aware of these differences and how they affect an individual's ability to receive and respond to information and adapting your approach accordingly, you can facilitate a more productive meeting, build stronger connections, and avoid misunderstandings.

Utilizing the insights from Crystal in pre-meeting strategy sessions, as First Citrus Bank does, helps the entire team align before speaking with clients to ensure seamless and effective communication.

"Since implementing Crystal, the calls are much better and engaging, and there is a much higher level of connection and rapport-building than we used to have."

- EVP, David Mastrorio

Overall Impact from Crystal

- *Increased conversion rates*
- *Less wasted time in calls and meetings*
- *Higher levels of client engagement and rapport*

Because of their success with the product, Crystal has become deeply integrated into the sales process at First Citrus and is now a required part of any important client meeting. Outside of pre-meeting strategy sessions, their team uses Crystal to reinforce internal sales training and methodology and to aid in developing relationships to the point of becoming “trusted advisors” for their clients.

In the future, David plans to align Crystal more closely with the Challenger Sale™ methodology to give reps even more structure for their conversations.

Learn more about you can use Crystal for Pre-Meeting Strategy Sessions:

REQUEST A DEMO

TRUSTED GLOBALLY BY THOUSANDS OF ORGANIZATIONS

