



Crystal 

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1-800-BOARDUP

MANAGING EXTERNAL RELATIONS WITH DISC BASED INSIGHTS

CASE STUDY: Stephanie Cancilla, 1-800-BOARDUP

1-800-BOARDUP

1-800-BOARDUP is a national disaster recovery organization focusing on assisting victims of disaster across the United States. Its network of professionals serves thousands of fire departments and citizens nationwide through direct support to first responders and valuable resources to those affected by a disaster. Stephanie Cancilla and the team at 1-800-BOARDUP are responsible for managing external relations across their various franchisees and partnerships. To make sure every relationship is as healthy as possible, Cancilla and the team rely on Crystal for personalized DISC-based insights across sales and customer relations.

GOING FROM PROSPECT TO FRANCHISE

1-800-BOARDUP's sales team is responsible for developing new partnerships with prospective franchisees across the country. Given the deep working relationships that 1-800-BOARDUP has with its partners, it's critical for the team to fully understand every prospect before signing them onboard to the franchise program.

1-800-BOARDUP leverages Crystal for a full 360-view of every potential partner. Whereas most personality assessments provide single insights and require an individual to complete an online test, Cancilla leverages Crystal's AI predictions to gain deeper insights based on DISC for the external parties she and her team are working with.

“One of the keys to doing business well is knowing your customer inside and out. Crystal insights give us a very good perspective on who we're dealing with.”

STEPHANIE CANCELLA

MANAGING EXISTING PARTNERSHIPS

Once partners begin working with 1-800-BOARDUP, it's up to Cancilla and the rest of the team to enable them to thrive in the network. Cancilla knows that the partners in 1-800-BOARDUP's network have incredibly busy schedules as they grow their franchises. She notes that "it's sometimes hard to engage these partners with our marketing team," but that engagement is a critical next step in a successful relationship.

To reach partners, 1-800-BOARDUP leverages Crystal to understand and connect with everyone in the franchisee's operation. Using Crystal insights, Cancilla can learn more about the franchisee's entire team and communicate with each individual more effectively. By personalizing outreach, messaging, and content to the individual, Cancilla has deepened relationships among existing partners and keeps even her most busy partners engaged in nationwide initiatives.

"We're selling and building relationships with our customers, with their customers, and with our fire departments with victim assistance. If we learn better how to relate to each of these people, it helps improve the entire organization."

STEPHANIE CANCELLA



TURNING TOUGH CONVERSATIONS INTO OPPORTUNITIES

Even with extensive vetting and strong working relationships, some partners still run into challenging situations that occasionally can lead them to want to leave the network. When this happens, it's critical for 1-800-BOARDUP's leadership team to understand the partner's troubles and position comprehensively. If partners are thinking about leaving, Cancilla pulls Crystal insights for her leadership team to understand the right negotiation tactics to use in the situation.

The Crystal Coach provides Cancilla and the team with an actionable guide for these tough conversations. Instead of approaching these scenarios blind, the team can base their strategy on the individual's likes, dislikes, motivators, strengths, weaknesses, and more. While the right approach might work for one partner, it's not always applicable for the next. Cancilla and the team rely on Crystal to strategically turn these tough conversations into opportunities to improve their partnerships.

“Without Crystal, I'd still be struggling to communicate. With Crystal, I've had zero customer complaints in the past eight months and have reduced our teams' need to send serious issues to collections by more than half compared to the previous period.”

STEPHANIE CANCELLA

Stephanie Cancilla ✓ Stephanie tends to be supportive & empathetic. She may dive into long, deep conversations instead of being direct.

ACCOMMODATING DIPLOMATIC STEADY

COUNSELOR

What comes naturally to Stephanie

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What energizes Stephanie

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