

## CRYSTAL'S ULTIMATE

# GUIDE TO PLAYBOOKS

*Get powerful personality insights using Crystal Playbooks*

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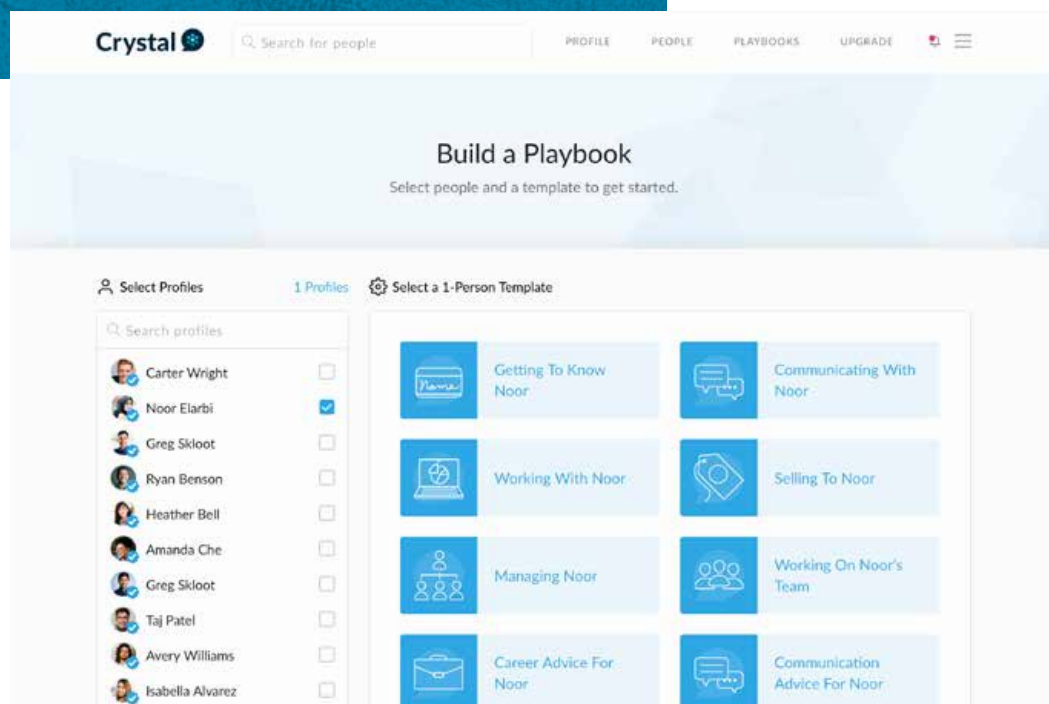
# INTROUDUCING PLAYBOOKS

Crystal's *Playbooks* give you a powerful way to create and share personality insights. Whether you're meeting with an important client or resolving conflict with a teammate, you can see specific insights that help you navigate each situation so you can communicate most effectively.

Playbooks are customizable web pages that provide you with personality insights and advice for a person or group of people. They allow you to learn more about others' strengths, communication style, personality types, behaviors, and more.

You can create Playbooks for an individual, a team of two, or a group of three people and up. There are many different playbook templates available, each with a different combination of insights so you can choose one that's best suited for your situation.

For Premium+ customers, there's also an option to "build your own" template, so you can pick and choose which insights are right for you.



# WHY SHOULD I USE PLAYBOOKS?

Playbooks go deeper than a traditional Crystal profile - they are intricate, interactive, artistic, and easily shareable.

Playbooks are here to help people understand each other - once we're able to really get where others are coming from, we can show more empathy and communicate more effectively. Because we all interact with plenty of other people, Playbooks can be used for a variety of scenarios.

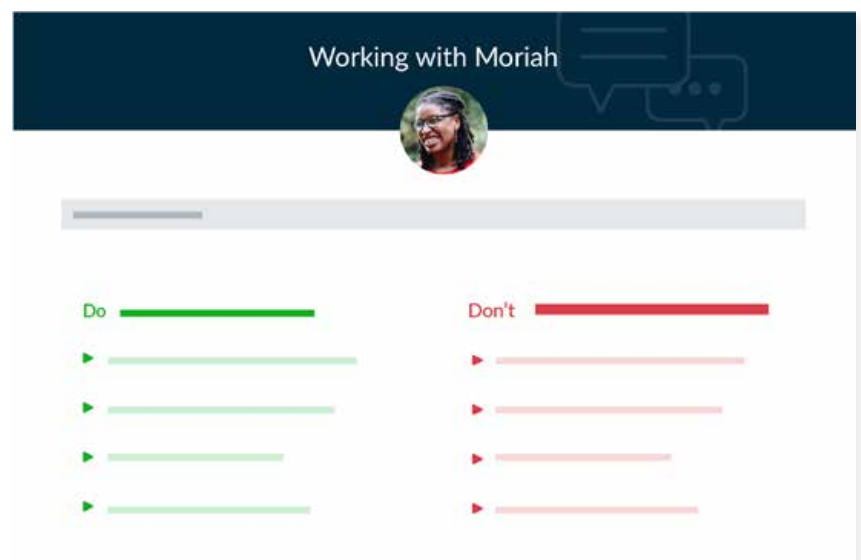
# PLAYBOOKS

## *Individual Playbooks*

Playbooks involving one person can help you really understand someone, like a coworker, family member, candidate, prospect, or even yourself. For example, let's say you're about to pitch a deal to a prospective customer. You've set up a meeting and now you just need to wow them. Instead of walking into the pitch anxious and unsure, having to guess with each thing you say, you can go in confident and optimistic, with insights that can help you communicate effortlessly with your prospect. Crystal has Playbooks that are specifically designed for selling and include insights on how to discuss pricing, negotiate, set expectations and more.

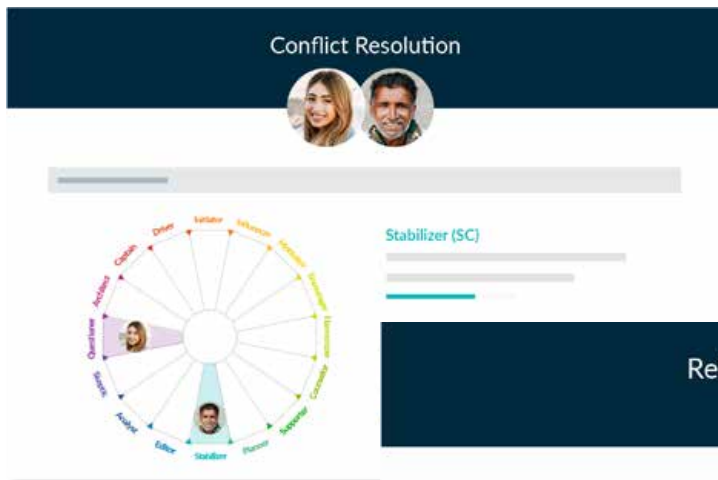
**Some popular Individual Playbook templates available now include:**

- [Selling to Someone](#)
- [Managing Someone](#)
- [Communicating with Someone](#)



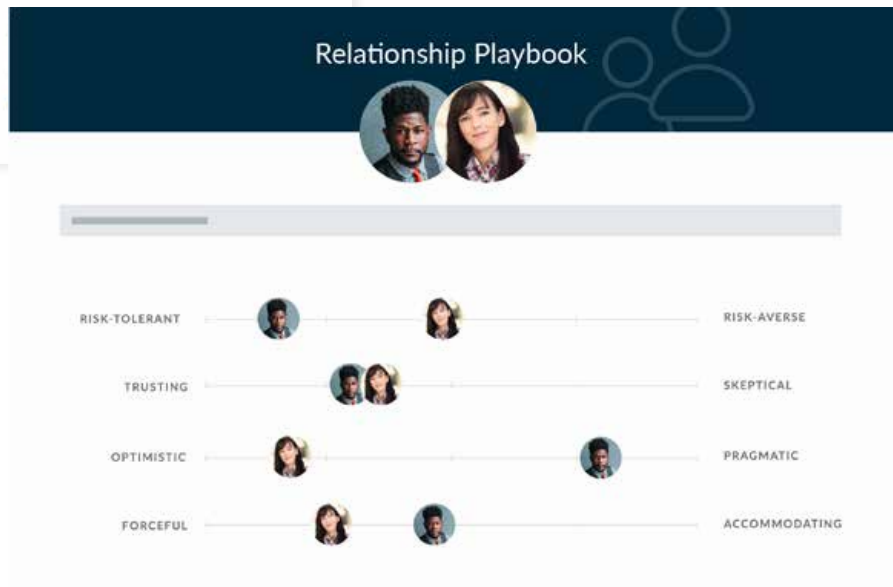
## 2-person Playbooks

Playbooks with two people can help you understand the dynamics of a relationship, like the relationship between yourself and a client, different people on your team, and more. In this scenario, maybe you're curious about how you and a coworker may naturally get along. You can build a relationship Playbook that offers understanding into your similarities and differences. You'll have insights into how you might navigate change together, resolve conflict, email, and more. By sharing this playbook with your coworker, you can both learn how to effectively communicate with each other and build a healthy working relationship that helps you both thrive.



Some popular Relationship Playbook templates available now include:

- Personality Comparison
- Resolving Conflict



## Group Playbooks

Playbooks for a group can help you understand how to communicate with 3 or more people at a time, which can be helpful for managing teams, group interviews, pitching to a group of clients, and more. A good use for this type of Playbook may be if you're looking to hold a meeting with your team at work. Group meetings can be infinitely more complex than 1-on-1 meetings since there are so many things at play, including everyone's natural communication styles, energizers, behaviors, and more. Leading a meeting that engages everyone can be tricky, but Playbooks can help provide tips so that you're able to appeal to each person individually.

Some popular Group Playbook templates available now include:

- Leading a Team
- Brainstorming Meeting
- Group Sales Meeting

## Zoom Meeting Playbook

# HOW MANY PLAYBOOKS CAN I MAKE?

Depending on your Crystal subscription, you'll have access to a certain number of Playbooks each month. For example, if you have 5 playbooks per month, you can build 5 individual, relationship, or group playbooks. If you are creating Group Playbooks, each Playbook can include up to 20 people in it.

At the start of each billing cycle, your playbook limit will automatically reset and you can continue building more playbooks for yourself and your team. If you purchase an annual subscription, your limit resets each year, so you have flexibility to build Playbooks as-needed over the year.

PLAYBOOKS

The screenshot shows the Crystal Playbooks interface. At the top, there is a search bar for people and navigation links for Profile, People, Playbooks, and Upgrade. The main heading is "Playbooks" with a sub-heading "View all of your playbooks below:". Below this is a search bar for playbooks and a "+NEW PLAYBOOK" button. The main content is a table listing five playbooks.

| NAME  | PEOPLE | CREATED ON    |
|---|--------|---------------|
| <b>Personality Comparison</b><br>Trevon Sloan & Heather Bell          |        | May 18th 2020 |
| <b>Group Negotiation</b><br>Trevon Sloan, Nell Chopra & 2 Others      |        | May 18th 2020 |
| <b>Brainstorming Meeting</b><br>Avery Williams, Katie Yang & 3 Others |        | May 15th 2020 |
| <b>Group Sales Meeting</b><br>Ryan Benson, Taj Patel & 2 Others       |        | May 15th 2020 |
| <b>Leading A Team</b><br>Greg Skloot, Drew D'Agostino & 2 Others      |        | May 15th 2020 |



# HOW DO I GET STARTED?

1

## SIGN UP FOR CRYSTAL PREMIUM

If you don't yet have a Crystal subscription, you can set one up quickly by purchasing one [here](#). After that, you can continue on with the next steps!

2

## VISIT THE "PLAYBOOKS" PAGE

You can find this at the top of the Crystal Dashboard or you can access it quickly [here](#).

3

## SELECT PROFILES.

Check the box to the left of each profile you want to use in your playbook. You can use the search bar above these profiles to search for someone's profile if you don't see it.

4

## SELECT YOUR TEMPLATE.

Your template options will vary based on the number of profiles in your Playbook, but you can click on a template to see a list of insights that will be included in your Playbook. You can even choose to see an example of what the template will look like before you create the Playbook by clicking "View Example" after you select your template.

If you have a Premium+ account, you also have the option to choose the "build your own" template and select the specific insight modules you want to see in your Playbook.





5

## CLICK “BUILD PLAYBOOK”

Once you officially “build” your Playbook, you’ll be able to access the specific personality insights for each profile you selected. From here, you can customize your Playbook name and change the privacy settings so only certain people can see it if you share the link. Premium+ customers also have the option of white labeling their playbooks by uploading their custom branding to the banner image.

6

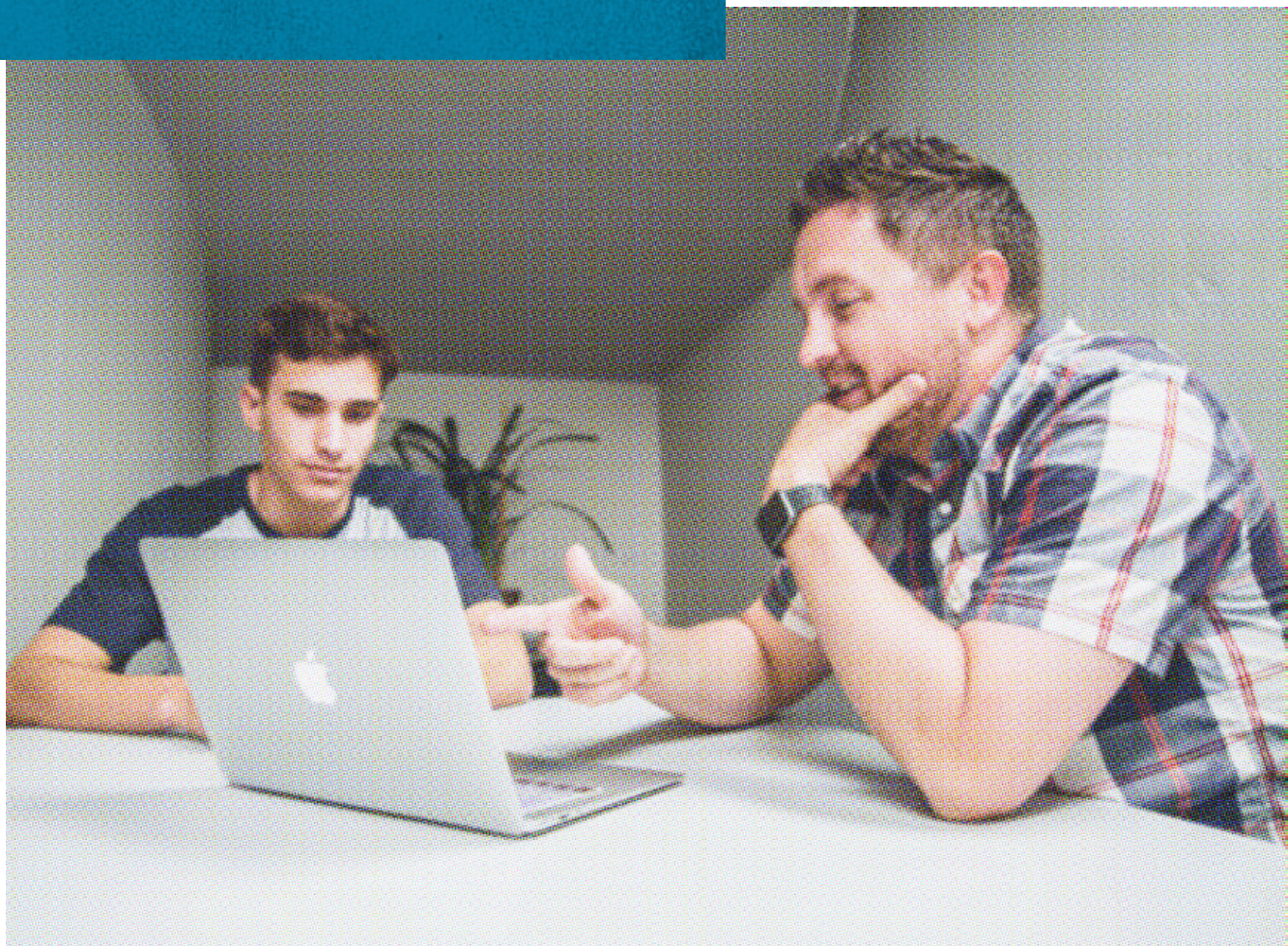
## DOWNLOAD, PRINT, OR SHARE YOUR PLAYBOOK

Now that you’ve generated these insights, try sharing them with others! If you built a playbook for an upcoming meeting, share the link with other people in the meeting (even if they don’t have a Crystal account) so they have access to the same personality insights and advice. It can act as a nice icebreaker for the discussion, while also helping everyone understand each other better, which eases communication and leaves room for empathy.



# STEP UP YOUR COMMUNICATION

Playbooks are an insight-packed, colorful way to access personality insights for any occasion. Whether you're meeting with a client to talk details or just having a casual meeting with coworkers, it's essential to be prepared so you can communicate impactfully and empathetically with everyone you meet.



# Before Crystal, *I was flying blind*

Give your sales team personality insights and advice for their clients, so they can navigate every meeting with confidence.



LIKES COMPETITIVE ADVANTAGE

LIKES STABILITY AND SECURITY



**TRY IT TODAY**

*Click to learn more*

**UPGRADE TO PREMIUM**