



**athics**  
cognitive science

# PSYCHOMETRIC PROFILING

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**#HOW DOES IT WORK?**

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# WHAT IS PSYCHOMETRIC PROFILING?

Psychometric profiling is a technique used in psychology which consists in the use of psychological tests to bring out a subject's personality traits.

## PROFILING TECHNIQUES

Psychometric profiling techniques involve the use of traditional tools, such as the OCEAN (Big Five) models, Life satisfaction, Schwartz Values, IQ etc.

In the digital field, the most widespread profiling tool is the cookie-based behavior tracking. However, profiling does not mean tracking.

Psychometric profiling allows you to detect the main personality traits of the interlocutor in real time.

This is done within a few turns of conversation, in an extremely accurate and bias-free manner, to ensure a personalized experience.

Unlike sentiment analysis, which limits itself to capturing the snapshot of the moment and does not provide sufficient information to determine behavior or the "next best action", psychometric profiling is based on the analysis of "function words", i.e. the words that they express "the way one speaks".

The analysis of "function words" differs from the analysis of "content words", i.e. the words that identify "what" we are talking about.

In particular, the greater frequency of "function words" within texts and speech therefore allows real-time profiling.



## WHERE IT APPLIES

Psychometric profiling can be applied both to short texts (messages via chatbot and live chat, telephone recordings) and to long texts (emails, web pages, documents), as well as to personal data (such as the personalized email domain based on user choices).



# CUSTOMER CARE



Detect customers' psychometric traits in real time to adapt messages and the most appropriate customer care strategy.

## WHERE TO USE IT IN CUSTOMER CARE?

Some examples: telephone recordings, emails and messages of customer requests, reviews or complaints, social comments, demographic information on CRM, chat...

The psychometric profiling applied to customer interactions with the customer care service allows you to adapt the communication style of the responses and prepare the next best actions according to the objectives of retention, loyalty and customer satisfaction.

Detecting the main personality traits of the customer during a real-time interaction allows you to understand intentions and needs and orient the customer care service.

## BENEFITS AND RESULTS

Adapt the contents of the customer care service to the customer profile.

Identify the expected behavior and prepare the next best actions to be taken.

- Identification of intentions, needs, problems
- Increased customer satisfaction
- Service optimization



# MARKETING

Identify the main personality traits and expected behavior of prospects and customers to set the communication strategy of marketing campaigns.



## WHERE TO USE IT IN MARKETING?

Some examples: emails and messages requesting customers, social comments, reviews, demographic information on CRM, chat...

Conversations with customers and prospects coming from the different contact channels become profiling content on the basis of which to set the communication style of sponsorship and advertising campaigns, promotions, direct e-mail marketing, direct messages.

Psychometric profiling allows you to detect character traits that indicate a propensity towards a particular communication style (logical vs emotional) or susceptibility towards gain/no gain or loss/no loss type messages.

## BENEFITS AND RESULTS

Adapt communication and marketing contents to the user profile.  
Identify the expected behavior and prepare the next best actions to be taken.

- Increased redemption of marketing campaigns
- Increase in conversion rate
- Development of brand loyalty





# DIGITAL SALES



Capture the profile of your prospects and prepare your communication to connect and increase sales opportunities.

## WHERE TO USE IT IN SALES?

Some examples: emails and messages requesting information, social comments, reviews, demographic information on CRM, chat...

Through the analysis of conversations coming from the different contact and assistance channels, it will be possible to detect the main psychometric traits of prospects and customers in terms of propensity to purchase, churn risk, willingness to up-selling and cross-selling, identify the high spending profiles and purchasing behavior (e.g. impulsive buyers).

Knowing the personality of your interlocutors allows you to anticipate the steps of the sales funnel and benefit from a competitive advantage in terms of conversion opportunities.

## BENEFITS AND RESULTS

Adapt sales communication to the profile of prospects and customers.  
Anticipate the most appropriate next best sales action.

- Increase in conversion rate
- Increase in average cart
- Personalization of the shopping experience
- Increased customer trust
- Optimization of sales processes

# HR

Psychometric profiling applied to HR allows you to adapt internal communication and orient HR choices based on the profile of candidates and employees.



## WHERE TO USE IT IN HR?

Some examples: application form, e-mail, messages, personal information, chat...

The analysis of the function words used within a few conversational exchanges allows us to detect the main psychometric traits of employees and candidates such as, for example, the tendency to work in a team, the ability to create empathy within the workplace, motivation and self-confidence.

Knowing the main psychometric traits of your people allows you to guide HR choices in the preparation of training plans or new internal projects, in the selection and recruiting processes, in the collection of feedback and assessment plans.

## BENEFITS AND RESULTS

- Identify the candidates most in line with a position
- Prepare tailor-made training plans for each candidate
- Optimize resource allocation
- Improve internal communication
- Increase employee satisfaction



# HOW TO USE PORTRAIT



## CHOOSE YOUR CHANNEL

Select the input channel (CRM, Whatsapp, Facebook, e-mail, documents, voice channel of a call center (speech to text) to collect at least 300 characters written by the user that PortrAlt will use for profiling.

## WHAT YOU WANT TO KNOW

Select the psychometric traits relevant to your business to learn and predict intention of your users.

CHURN



UPSELLING



DECISION\_MAKING



+80  
traits



## INTEGRATE PORTRAIT

Connect Portrait to your service and use the results to make your choices your next best action.





**Massachusetts  
Institute of  
Technology**

# portrait OUR SOLUTION

"PortAlt" is the result of 12 years of research by the Massachusetts Institute of Technology.

The research used a data set of over 20,000 profiles carried out with ordinary techniques, such as the Big Five (OCEAN), Life satisfaction, Schwartz Values, IQ models, which were used as control tests to verify the quality of the algorithm, subsequently applied on millions of social profiles.

The result is a real-time profiling technology capable of returning more than 80 psychometric traits relating to people's attitudes, personality, behaviors and values.

Based on this information you can choose the language, approach and content that are in tune with the interlocutor and personalize the relationship making it more engaging and effective.

# WHY DOING PSYCHOMETRIC PROFILING

Psychometric profiling allows you to detect the main personality traits of the interlocutor to guide your communication choices accordingly.

Unlike content-based profiling options, psychometric profiling is behavior-based.

The application of this technology to digital interactions with your customers allows you to:

- Know your interlocutors and guarantee a personalized experience in the most appropriate language.
- Prepare communication based on a common ground of sharing and interaction capable of putting the user at ease.
- Obtain a competitive advantage in terms of conversion capacity and engagement.
- Obtain real-time data to be able to plan the "next best actions" to be carried out.
- Reduce the churn and drop rate of conversations during conversion.
- Increase user retention and customer satisfaction.
- Develop brand loyalty.

## A USE CASE

PortrAlt technology was used by a well-known Italian fashion brand to direct its Facebook re-targeting campaigns.

The target was divided into 2 groups:

Followers of the page who had liked a piece of content

Page followers profiled based on the contents of their Facebook profile

The first group was sent a generic campaign; the second group received a campaign with content aimed at the psychometric profile.

## RESULTS

### **+48% AVERAGE CART INCREASE**

Using PortrAlt in Facebook re-targeting campaigns generated 48% more sales.

### **+11% CONVERSION RATE**

The ability to return personalized responses and content to the user's profile favored an 11% increase in terms of new customers acquired.



# AI AGENTS INTEGRATION

Psychometric profiling can be used both stand alone and integrated within AI agents.

The integration of PortrAlt within the conversational flow of virtual assistants created with CRAFTER.AI™ allows you to detect the psychological traits of the interlocutor and consequently adapt the contents and communication style to the user's profile and increase the chances successful conversations.

Within a few exchanges of conversation, the AI agent has the ability to understand what importance the interlocutor attributes to issues such as loyalty or sustainability, susceptibility towards emotional or rational communication, willingness to pay debts or the desire to be be sure, you get an indication of how much a person wants to feel part of a group or prefers to stand out from others.

Based on this information, the virtual assistant identifies the "next best action" to perform based on the user profile detected at that moment and returns the most appropriate tone and language, as well as the approach and content that most in harmony with the interlocutor.

The result is a personalized relationship and a more engaging and effective conversation experience.



# RESULTS

## PSYCHOMETRIC PROFILING



### 72% RELIABILITY

PortrAlt's psychometric profiling returns results with a reliability of 72%. This allows you to benefit from a competitive advantage in terms of personalization of the user experience, probability of conversion, optimization of sales results.

### MORE THAN 80 PROFILES

PortrAlt allows us to detect more than 80 psychometric profiles, from which traits emerge such as the greater or lesser propensity to churn, the susceptibility towards an emotional or more institutional communication style, the desire to belong to a community or to stand out from the group, the sensitivity towards social and environmental issues, attention to personal well-being...

### INCREASE IN SALES

The application of the technology to the Facebook re-targeting campaigns of a well-known Italian fashion brand generated 48% more online sales.





# poortrait

## OVERVIEW

### REAL TIME

Real-time profiling based on function words analysis within a few conversational turns

1

### UNBIASED

Analysis of function words returns un-biased results, because it detects "how" you speak vs "what" you say

2

### RELIABLE

Capable of detecting more than 80 personality traits, with a profiling reliability of 72%

3



### DATA DRIVEN

Functional profiling data to improve offers and services

4

### PERSONALIZED INTERACTIONS

Increase personalization of interactions, with content and responses in line with the user profile

5

### LOYALTY & CONVERSION

Develops loyalty and increases conversion rate by connecting with the user

6

# API

## API INTEGRABILITY

PortrAlt's technology can be used stand-alone or integrated within other systems via API.





# THANK YOU!

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