

Empowering a New Way of Working

Tommy & Co

Business growth through the use of AI

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Tommy & Co gets personal for business expansion

Tommy & Co using with AI Personality Insights to get to know its team, customers, prospective customers and partners better and growing its business one relationship at a time.

84%
of buyers consider being treated as a person

68%
increase in outbound response rates

31%
increase in lead conversion rates

eight full time staff
based in Pukekohe

SUMMARY/RESULTS

Accounting and business advisory practice, Tommy and Co is using the Crystal Knows AI personality data platform to deepen relationships with its own team, customers, prospective customers and partners.

The AI technology is helping improve the prospecting process, enabling Tommy and Co to more effectively convert prospective customers.

Using Crystal Knows, Tommy and Co are opening new revenue streams with a greater focus on business advisory.



ABOUT TOMMY AND CO

Tommy and Co are a specialist accounting and business advisory practice working with small and medium sized businesses across New Zealand.

Its team of eight full time staff, based in Pukekohe, and four contractors, work across a range of sectors with a focus on growing and improving businesses with clients, putting the heart (help, empathy, adding value, relationships and teach) into accountancy and business advisory.

BACKGROUND —

Tommy Liu understands the importance of knowing his team, clients, and partners —and meeting them on their terms.



However, when he first explored the AI personality data platform Crystal Knows, he wasn't fully aware of its use cases beyond the customer sales process.

Just a few months down the track, Liu, owner of accountancy and business advisory company Tommy & Co, is using the platform to build stronger and better relationships with his own team, clients and prospective clients, and with partners, and harnessing it to expand his business.

Crystal Knows provides business professionals with an AI driven personality data platform built to enhance emotional intelligence skills and help teams build rapport and relationships through understanding the best way to communicate with each individual.

> **"Tommy and Co are dedicated to helping people and businesses grow. Our vision is to build a better future for you, one business at a time, with core values of being professionals with heart,' says Liu. "That's H.E.A.R.T—Helping through actively supporting clients, providing Empathy, Adding value, focusing on Relationships, and Teaching clients."** ***Liu highlights that Crystal Knows is particularly enhancing the last two: relationships and teaching.***

"This AI-powered platform helps you establish rapport and build trust rapidly. It's designed to enhance human interactions by providing deeper insights—not to replace them."

OUR VISION

Building a better future for you, one business at a time.

Building relationships through understanding

Using publicly available data, **Crystal Knows applies the DISC personality assessment model to analyse communication styles and behavioural tendencies.** It then generates actionable insights that help sales teams tailor their approach to buyers' personalities, leading to shorter sales cycles and more effective calls, meetings, and interactions.

Beyond sales, the platform supports internal team dynamics, enhances customer workshops, and optimises recruitment by providing a deeper understanding of candidates' working styles and motivations."

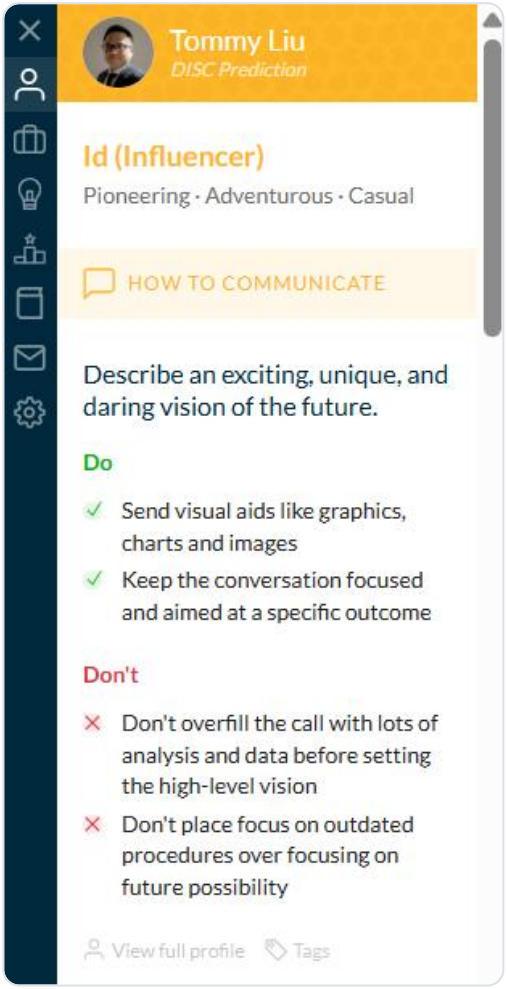
That's where Tommy and Co, began.

> **"I knew it could enhance internal staff engagement—so we put it into action," says Tommy.**

The company conducted an internal workshop, profiling each team member and following up with a session to 'unpack team dynamics', helping everyone understand each other better.

"We immediately saw improvements in team communication, and engagement levels rose right away," Tommy recalls.

He acknowledges some initial scepticism from staff, but that quickly faded once he shared his own personality insights.



"It finally clicked when I revealed my profile—the team could see the reasons behind some of my behaviours and gained a deeper understanding of me. For example, they recognized that my challenge lies in handling details and rigid processes. But those are the strengths of my team, and in that moment, they saw why they were there, how they contribute to the business, and how they fill critical gaps within our team.

Of course, having an engaged team is just one piece of the puzzle —you also need to drive results. Tommy has leveraged Crystal Knows for client engagement, enabling his team to better understand client behaviours and decision-making processes."

"We use it in our prospecting process and even in managing existing client relationships to increase their experience as a client of Tommy and Co."



The tool is also being used for business development with some high-end clients and has also been used in strategy and forecasting engagements.

"Much of our business is in the normal day to day accountancy work, but it is in the advisory-led engagement where we can really add to the benefits for existing clients and new clients," Tommy says.

We run workshops where business leaders complete DISC profiles, allowing us to analyse their team dynamics. Often, underlying issues are brewing beneath the surface, and it's only when we dive in that we uncover challenges rooted in poor communication—people operating in their own way without considering how others think and feel."

"Through understanding how others in your teamwork – their strengths and weaknesses and how they like to communicate – you can get stronger outcomes.

"And the same applies when working with customers and prospective customers."

It's also beneficial, he notes if you can identify a change leader within any group – enabling you to work more closely with them to bring about the required changes.

Tommy is now using the tool for hiring, feedback and conflict management processes internally as well.

84%	68%	31%
of buyers	increase in outbound response rates	increase in lead conversion rates

Garry Green, MD for Quanton, highlights research showing that **84% of buyers consider being treated as a person, rather than a number, crucial for winning their business.**

"The data indicates that understanding customer personality leads to a 68% increase in outbound response rates and a 31% increase in lead conversion rates," he says. This demonstrates how personalising interactions can directly impact business outcomes, fostering stronger relationships and driving measurable success.

IT'S DISC, BUT NOT AS YOU KNOW IT

DISC has been a well-known personality assessment tool since the 1920s, but Tommy says while he liked the manual form of the assessment, it had its limitations, including the cost, no integration with other systems creating limited opportunities to harness the information later on, and a long waiting period between doing the test and getting the assessment back.

> **"Garry and I were discussing the importance of engaging and building stronger relationships," says Tommy. "My goal this year is to strengthen connections with my staff, customers, potential clients, and partners. Through Quanton, we learned how leveraging Crystal Knows and AI can accelerate this process, enabling us to build these relationships more quickly and efficiently."**

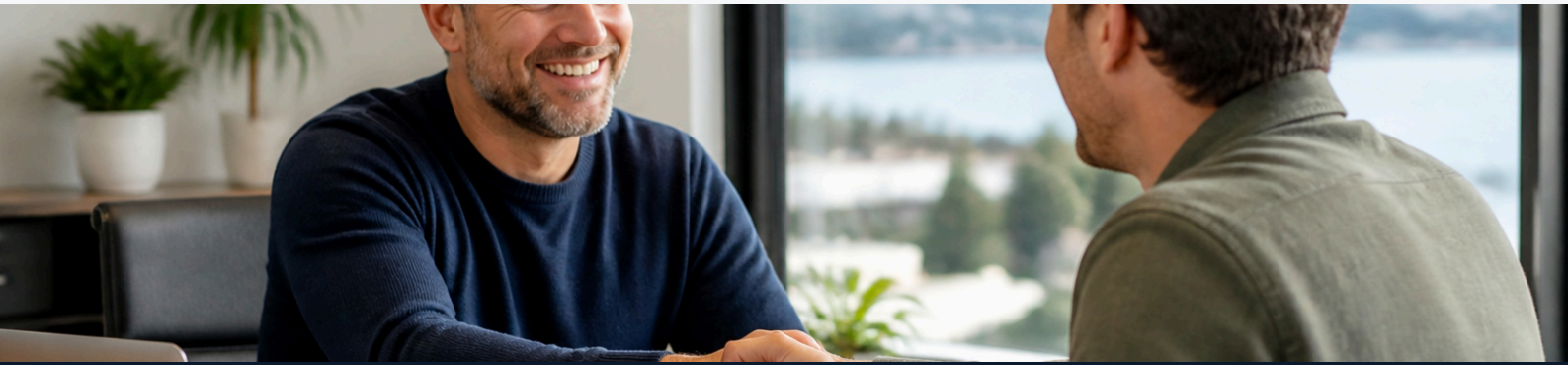
PARTNERING UP FOR SUCCESS

But Tommy acknowledges that there's more to Crystal Knows than simply plugging in data and receiving actionable insights. **"It's not about the report itself; it's how you use it.**

For that, I recommend partnering with an expert and trusted advisor like Quanton. They can significantly speed up your learning curve and help you start seeing value quickly," *he says.*

Much like a gym membership, Liu points out that simply having access to Crystal Knows isn't enough.

"It requires investment in both time and resources to truly unlock its full potential. You have to actively engage with it, refine your approach, and set clear goals for what value you want to achieve before jumping in with both feet," he advises.



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