

DNA Behavior[®]

Behavioral Intelligence is
Rewiring Organizations

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From optimizing numbers to fully personalizing people — powered by forward-looking behavioral intelligence

Optimizing the Numbers — Today

Quanta: Numbers · Averages · Lagging Indicators · Fully Automated

- Reinforce Past Patterns
- Financial Metrics
- KPI's
- Operational Dashboards
- CRM Data
- Demographic Segmentation
- Transaction Data and Analysis
- Business Events
- Report Preparation
- Output Focus
- Lagging Metrics
- Numbers
- Skills
- Periodic Reviews
- One Size Fits All
- Company-Centric
- Technology Led
- Fear-Based Cultures

CURRENT STATE · GOAL

Linear Growth

80% personalization for 20% of clients
Results-focused · Reactionary · Information Provider

Optimizing People with Personalization — Future

Qualia: People First · Behavior · Uniqueness · Powered by Behavioral AI

- Capture Human Variability
- Why It Happened
- What Will Happen Next
- How People Behave Under Stress
- Risk Posture and Biases
- Instinctive Decision Patterns
- Communication Preferences
- Trust Style
- Real-Time Monitoring
- Relationship Focus
- Predictive Intelligence
- Financial Behavior
- Talent Alignment
- Read and Manage Behavioral Signals in Real-Time
- Personalization
- Customer-Centric
- Human Led AI
- Psychological Safety

FUTURE STATE · NEW GOAL

Value Creation

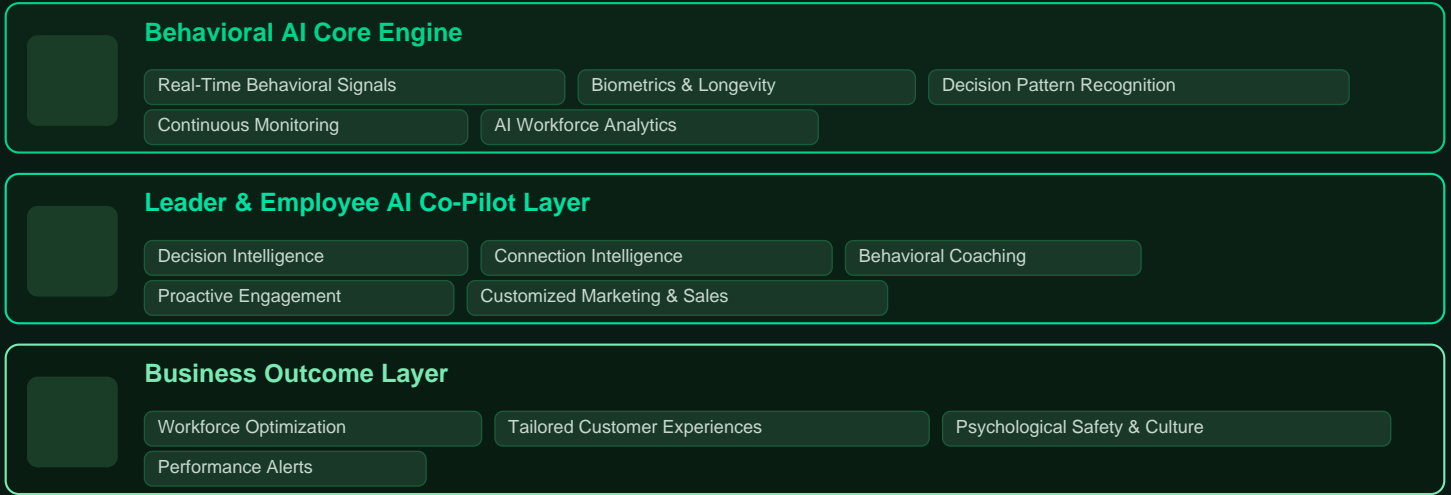
98% personalization for 98% of clients
High-value human conversations powered by AI Co-Pilot

Rewiring Your Organization

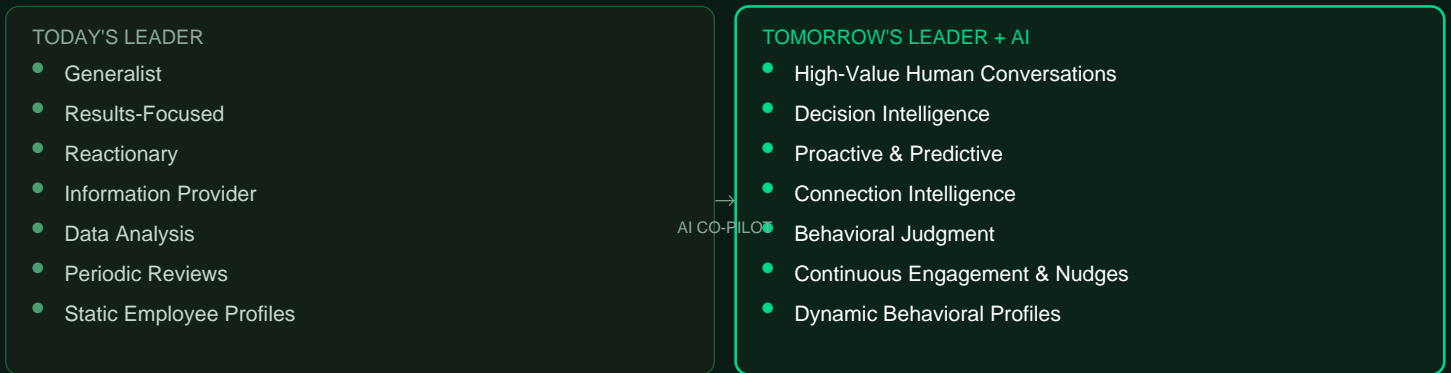
Firms that do nothing risk obsolescence. An optimized platform saves team members **12–18 hours per week** and increases team effectiveness by **70%**. Personalization unlocks **60% more opportunities** and increases revenue by **23%+**.

THE CENTRALIZED LIGHTHOUSE PLATFORM

Every Leader and Employee Delivering Personalized Experiences with Consistency



THE LEADER TRANSFORMATION



12 Modules of the Centralized Tech Stack

The Lighthouse Platform is assembled in three layers. **Layer 1** modules already exist in most businesses. **Layer 2** introduces the Behavioral AI intelligence that powers personalization — with **DNA Behavior** as the core insights engine. **Layer 3** modules are strategic enhancers that unlock full performance optimization and revenue growth.

LAYER 1 - EXISTS

Foundation modules already present in most businesses

01
Marketing & Sales CRM

02
HR & Talent Management

03
Accounting Systems

04
Workforce Productivity Tools

LAYER 2 - BEHAVIORAL INTELLIGENCE

The AI-powered core — drives personalization, decision intelligence and productivity

05
Enterprise Data Warehouse

06
DNA Behavior + Money Insights Platform
Core behavioral insights engine

07
AI Agents & Decisioning Digital Twins

08
AI Workforce Optimization Analytics

LAYER 3 - ENHANCERS

Strategic capabilities that unlock performance optimization opportunities

09
Psychological Safety & Culture

10
Risk Management & Governance

11
Financial Health & Literacy

12
Biometrics & Stress Management

S **DNA Behavior** is the foundational behavioral insights provider powering the entire platform. All other modules — whether built in-house or sourced from best-in-class third-party providers — connect into the DNA Behavior engine to deliver consistent, personalized behavioral intelligence across every leader and employee interaction. The result: businesses save **12–18 hours per week per employee** of capacity while unlocking **60% more opportunities** and increasing revenue by **23%+** through full behavioral personalization.

Behavioral AI in Practice: Transforming Enterprise Consulting at Scale: Sirius Resources Case Study

A small number of leading consulting firms are already redefining the industry by demonstrating how behavioral intelligence is transforming consultants' productivity and personalizing client experiences at scale.

Sirius Resources serves the major Fortune 500 companies with more than **4,000 consultants** and a revenue of over \$2.5 billion. At this scale, manual research, analysis and report preparation are no longer feasible. Consultants were spending an estimated **12–18 hours per week** on administrative tasks, sales and fragmented research and analysis, leaving limited time for high-value client interactions that require judgment calls.

The Centralized Platform Decision

Facing margin compression, rising client expectations, and increasing delivery complexity, Sirius Resources committed to building a centralized solutions platform based on **the Behavioral AI Future is Now in Business Roadmap** (See attached), designed by DNA Behavior.

Their goal: shift from a numbers-and-one-size-fits-all service delivered manually to a financial behavior and personalization approach by optimizing human-AI technology, while enabling consultants to deliver more insightful, behaviorally informed guidance.

This was not a technology initiative — it was a fundamental redesign of how the firm delivers insight, makes decisions, and scales expertise.

As a result, they created "**Lighthouse Insights**"—a Behavioral AI decisioning engine powered by DNA Behavior's psychometric data which they identified as like "liquid gold". This constantly running behavioral layer sits behind the consultant's desktop, surfacing **next-best-value opportunities** for every client and prospect.

How Lighthouse Insights Works Through Four Integrated Layers

1. **Centralized Data Foundation:** Unifies data from CRMs, HR, financial, and operational systems into a single intelligence layer.
2. **Mass Behavioral Profiling:** DNA Behavior's Digital Scan processed ~10 million people (across employees + company leadership datasets globally) in one batch—no manual profile completion required. This generated **4,000+ psychometric measures** on each person covering emotional drivers, financial behaviors, communication style, and decision patterns.

3. **AI Fusion Layer:** Continuously integrates behavioral, financial and operational data Behavioral via machine learning as business and life events, market movements, and other signals arrive.
4. **Behavioral Workflow Integration:**
 - **Leader-Consultant-Client Style Matching:** Aligns team members with client communication preferences.
 - **Workforce Optimization:** Analyzing behavioral talents, skills, performance data to optimize roles, project delivery and business innovation.
 - **Business Mood Analysis:** Detects real-time behavioral responses to critical market and business events.
 - **Leader Financial Value Creation:** Predicts leadership behavior impact on performance, beyond lagging KPI's.
 - **Enhanced Communication Segmentation:** Tailors marketing, sales, engagement and work product messaging by behavioral profile
 - **Behavioral Decision Guidance:** Interprets client stress triggers and frames recommendations to avoid the Decision Cascade Syndrome from one poor choice
 - **Succession Planning:** Developing future leaders by building behavioral decision capability and ensuring leadership pipeline resilience in an AI-driven organization.

The New Client Experience

For every client, matched consultant co-pilots deliver:

- **Next-best conversation** recommendations
- **Curated research/insights**
- **Optimized decision choices**
- **Personalized communication and report drafts**
- **Business event response strategies**

Consultants receive pre-written messaging tuned to each client's DNA profile and engagement history, which they review, edit, and approve. The system learns from actual client responses (what they ask, open, ignore, act on), creating a **continuous behavioral feedback loop** that improves precision over time.

Generative AI layers further enhance this: consultants query the firm's research/policies in plain language, while post-meeting AI tools auto-generate notes, CRM entries, reports, analyses and follow-up actions.

This transforms the client experience from reactive consulting to proactive, behaviorally guided decision support.

The Results

Consultant adoption reached near-universal levels within months — a rare outcome for enterprise AI initiatives. Leadership's message is clear: **AI enhances, never replaces, the human consultant**. Machines handle data synthesis, pattern recognition, and first-draft creation. Humans deliver **connection intelligence**—reading subtle cues, framing complex trade-offs, coaching behavior, and building trust.

" This case demonstrates that behavioral AI does not commoditize consultants — it elevates them. It gives them superpowers: personalized guidance at industrial scale, so every client gets high-touch service regardless of revenue size."

Strategic Implications

This model creates three enterprise-level advantages:

1. **Consultant Capacity:** 12–18 hours/week reclaimed for client acquisition and relationship deepening
2. **Decision Consistency:** Behavioral guardrails reduce mis-suitability risk across a huge variety of organizational clients
3. **Scalable Personalization:** "Segment-of-one" advice for every client, regardless of size or complexity

DNA Behavior enables consulting firms to operationalize behavioral intelligence As a core enterprise capability, creating a platform others can't easily replicate in a disruptive environment. Lighthouse Insights shows how this elevates consultant value, unlocks organic growth, and builds lasting competitive moats.

Financial Impact at Scale

The economic impact is driven by a combination of productivity gains, improved conversion, and deeper client engagement.

Per consultant economics is: 12-18 hours unlocked for revenue producing activities for growth and client meetings and ~\$115,000 to \$300,000 additional profit contribution per consultant (assuming \$300,000 to \$450,000 increased revenue capacity).

The firm: When each consultant's increased productivity is unlocked, this delivers an additional 460m to \$1.2 billion in profits.

Disclaimer: This is a hypothetical scenario and not intended to be a guarantee of results. Each firm's performance may vary based on the depth and consistency of execution.

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