

DNA Behavior[®]

Behavioral Intelligence is
Transforming Leadership

Behavioral Intelligence is Rewiring Organizations

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

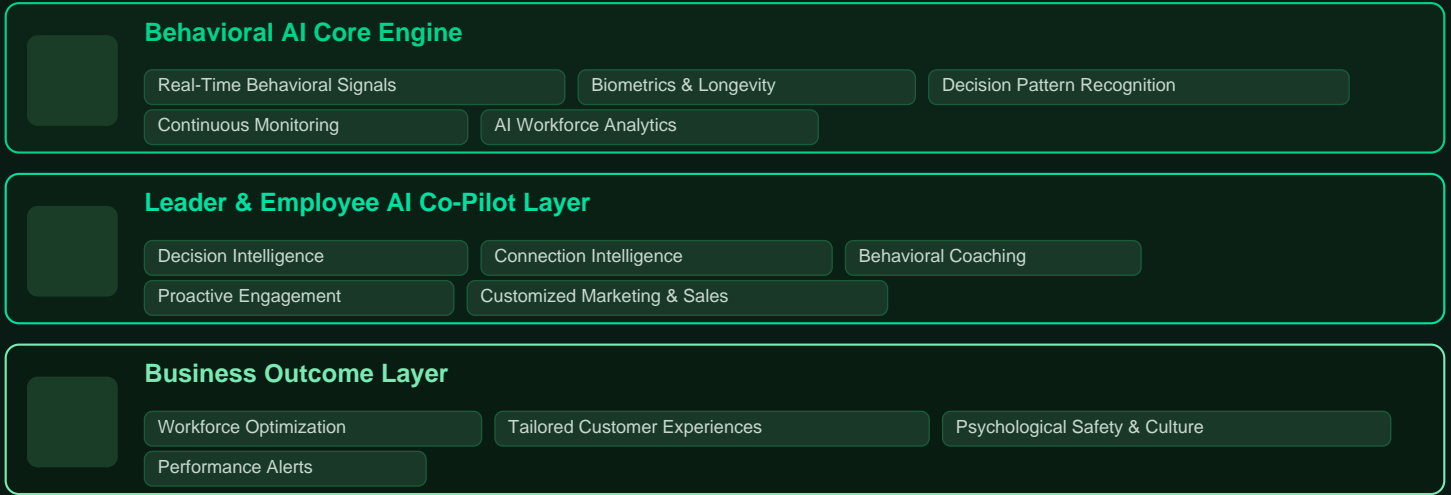
98% personalization for 98% of clients
High-value human conversations powered by AI Co-Pilot

Rewiring Your Organization

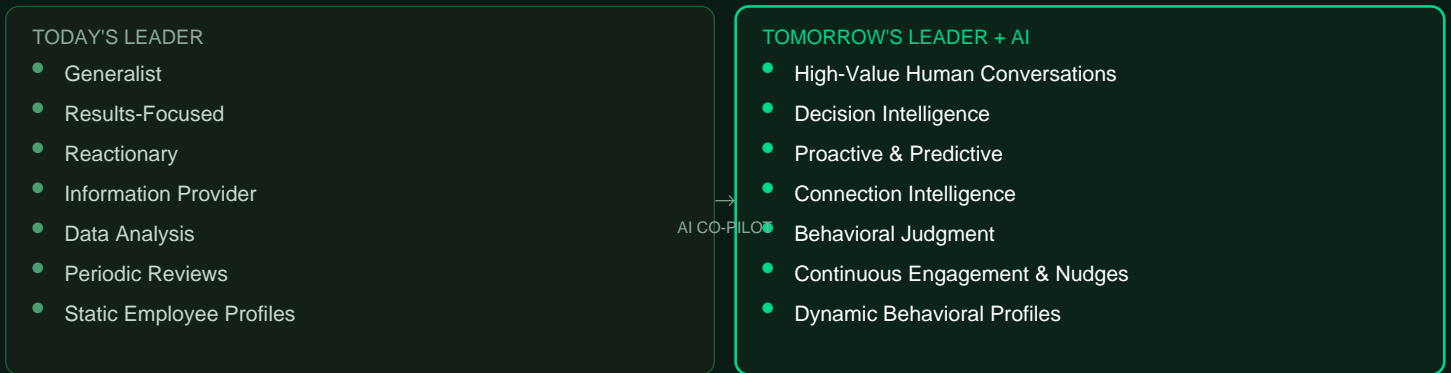
Firms that do nothing risk obsolescence. An optimized platform saves team members **12–18 hours per week** and increases team effectiveness by **70%**. Personalization unlocks **60% more opportunities** and increases revenue by **23%+**.

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

<p>01 Marketing & Sales CRM</p>	<p>02 HR & Talent Management</p>	<p>03 Accounting Systems</p>	<p>04 Workforce Productivity Tools</p>
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LAYER 2 - BEHAVIORAL INTELLIGENCE

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

<p>05 Enterprise Data Warehouse</p>	<p>06 DNA Behavior + Money Insights Platform <small>Core behavioral insights engine</small></p>	<p>07 AI Agents & Decisioning Digital Twins</p>	<p>08 AI Workforce Optimization Analytics</p>
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LAYER 3 - ENHANCERS

Strategic capabilities that unlock performance optimization opportunities

<p>09 Psychological Safety & Culture</p>	<p>10 Risk Management & Governance</p>	<p>11 Financial Health & Literacy</p>	<p>12 Biometrics & Stress Management</p>
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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.

DNA Behavior®

Behavioral Intelligence is Rewiring Organizations

Behavioral AI in Practice: Transforming Enterprise Leadership at Scale

Sirius Resources Case Study

How the CEO and C-Suite Rewired a \$2.5B Consulting Firm
Using the Lighthouse Insights Platform Powered by Aristotle DNA

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The CEO Imperative: A Firm at an Inflection Point

Sirius Resources — a \$2.5 billion consulting firm serving major Fortune 500 companies with more than 4,000 consultants — arrived at a defining strategic crossroads. The symptoms were familiar to any C-suite leader navigating a competitive, margin-compressed market: high-performing consultants buried in administrative overhead, client relationships managed reactively, and leadership decisions driven by lagging KPIs that told them what had already gone wrong. The firm’s leadership team recognized a fundamental truth: the era of generalist, numbers-first consulting was ending. What was required was not a new technology implementation — it was a fundamental rewiring of how the firm’s leaders thought, decided, and engaged at every level.

\$2.5B Annual Revenue	4,000+ Consultants Worldwide	Fortune 500 Client Base
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THE CEO CHALLENGE — WHAT NORA SAW

Nora, the CEO (DNA Style: Influencer), saw three converging forces threatening the firm’s competitive position. First, **margin compression**: as consulting services became increasingly commoditized, the ability to command premium fees required demonstrably superior outcomes — not just faster delivery. Second, **talent ceiling**: Sirius’s consultants were spending an estimated **12–18 hours per week** on administrative tasks, fragmented research, and manual report preparation. That wasn’t a productivity problem — it was a strategic waste of the firm’s most valuable asset. Third, **relationship fragility**: client relationships were built on the knowledge and judgment of individual senior consultants, creating a scalability ceiling and a retention risk every time a senior person left.

THE CEO DECISION — LIGHTHOUSE INSIGHTS

Nora’s response was decisive. Working with DNA Behavior’s Behavioral Solutions Architect, she commissioned the design of **Lighthouse Insights** — a centralized Behavioral AI decisioning engine powered by DNA Behavior’s psychometric data. Critically, this was not framed internally as a technology initiative. It was positioned as what it actually was: **a fundamental redesign of how Sirius Resources delivers insight, makes decisions, and scales expertise.**

“My job as CEO changed the day Lighthouse went live. I stopped managing a firm of 4,000 consultants and started leading an organization where every single leader had the behavioral intelligence to make the right calls — consistently — without waiting for me to weigh in.”

— Nora Valdez, CEO (Influencer) — Sirius Resources

THE CEO CO-PILOT — WHAT ARISTOTLE DNA SURFACES EVERY DAY

- **Organizational Alignment Dashboard**: Real-time view of where Quanta metrics (revenue, margin, KPIs) and Qualia behavioral signals are misaligned — surfacing revenue or retention risks before they appear in reports.
- **Culture Signal Report**: Continuous pulse on psychological safety across the organization, flagging any leader or team operating in fear-based mode before it becomes a performance or attrition event.
- **Top 3 Daily Decision Priorities**: Each framed with behavioral context, risk posture analysis, and Decision Cascade risk — so Nora makes fewer reactive calls and more behaviorally grounded ones.
- **Stakeholder Engagement Intelligence**: Behavioral briefings before every board, investor, or key client interaction — ensuring alignment of communication style to the specific audience.

The Operating Core: COO, CHRO & CFO Perspectives

Nora's first action after the CEO decision was to activate three Co-Pilots simultaneously — for her COO, CHRO, and CFO. Her logic was deliberate: the Lighthouse Platform would only succeed if the firm's operational, people, and financial intelligence were all rewired together. Each executive received a personal Decisioning Digital Twin and a role-specific Co-Pilot powered by Aristotle DNA.

The COO — Organizational Nervous System

For Robert, the COO (DNA Style: Initiator), the platform transformed his role from organizational firefighter to behavioral quarterback. Before Lighthouse, Robert managed operations through dashboards that told him what had broken. After activation, his Co-Pilot surfaced **behavioral early-warning signals** — detecting team capacity risks, client delivery friction, and engagement disengagement patterns before they became escalations.

- **Operational Workflow Intelligence:** Real-time behavioral signals across all delivery streams — bottlenecks surfaced with behavioral root causes, not just output failures.
- **Client Retention Signals:** Behavioral shifts in client interaction patterns flagged 6–8 weeks before a relationship would have been at risk — giving account leaders time to intervene.
- **Cross-Functional Co-Pilot Coordination:** Robert's Co-Pilot orchestrates all C-Suite AI interactions, ensuring that the CEO, CHRO, and CFO Co-Pilots are aligned — not operating in silos.
- **Platform Health Oversight:** Robert owns the operational integrity of all four Lighthouse layers — ensuring data flows are current and behavioral intelligence is actionable in real time.

"I used to find out about a team's breaking point when someone resigned or a client complained. Now Aristotle flags the behavioral signals three weeks earlier. That's not an operational improvement — that's a fundamentally different way to lead."

— Robert Davies, COO (Initiator) — Sirius Resources

The CHRO — Talent as a Behavioral Science

For Raj, the CHRO (DNA Style: Relationship Builder), Lighthouse Insights replaced the firm's entire approach to human capital with a behavioral science framework. The traditional HR cycle — annual reviews, periodic engagement surveys, reactive talent conversations — was replaced with **continuous behavioral intelligence** delivered in real time through every leader's Co-Pilot.

- **Talent Alignment Monitor:** Each of the 4,000 consultants is mapped against their behavioral strengths. Misalignment between role demands and natural talents is surfaced to line managers before it becomes disengagement.
- **Succession Pipeline Intelligence:** Behavioral readiness of high-potential leaders assessed continuously — not during annual talent reviews. The pipeline is always current.
- **Culture Health Dashboard:** Psychological safety indicators monitored across every team. Fear-based patterns detected and escalated to relevant leaders before they spread.
- **Mass Behavioral Profiling:** DNA Behavior's Digital Scan processed all 4,000+ consultants in a single batch — generating 4,000+ psychometric measures per person with no manual profile completion required.

The CFO — Behavioral Drivers of Financial Outcomes

For Elizabeth, the CFO (DNA Style: Strategist), the most significant shift was moving from lagging financial indicators to **behavioral predictors of financial performance**. Lighthouse's AI Fusion Layer connects leadership behavior patterns to revenue trends, cost outcomes, and margin movements — giving Elizabeth a forward-looking lens that no traditional financial system could provide.

- **Financial Behavior Monitor:** Leadership behavioral drivers behind revenue trends and margin shifts surfaced — not just the numbers, but why they moved.
- **Decision Cascade Risk Alerts:** High-stakes financial decisions flagged when behavioral stress signals suggest a leader is in reactive mode — preventing costly rushed commitments.
- **Opportunity Unlock:** 60% more opportunities identified through behavioral alignment between consultant strengths and client profile — translating directly into revenue pipeline growth.

Revenue, Growth & Innovation: CRO, CTO & CMO

The CRO — From Transactional to Relationship-Driven Growth

Michael Skaufel, the CRO (DNA Style: Influencer), had spent years building a sales organization that was fundamentally transactional. Revenue growth was driven by volume — more consultants, more pitches, more proposals. Lighthouse Insights rewired this model completely. Instead of volume, Michael's Co-Pilot surfaces **behaviorally prioritized revenue opportunities** — ranked by the match between a prospect's decision style and Sirius's delivery capability.

- **Next-Best Revenue Intelligence:** Top 3 behaviorally prioritized sales opportunities surfaced daily — each with the prospect's DNA style and recommended engagement approach, not a generic pitch script.
- **Pipeline Behavioral Health:** Deals flagged when communication style mismatches between the consultant and the client buyer are creating friction — with specific behavioral adjustment recommendations.
- **Pre-Written Behaviorally Calibrated Outreach:** Every piece of sales communication drafted to match the recipient's behavioral profile. Michael's team reviews and approves — they don't write from scratch.
- **Sales Team Alignment:** Each salesperson matched to their optimal client type based on behavioral compatibility — eliminating the “wrong person, wrong client” conversations that drain pipeline health.

“Our pipeline used to be managed by gut feel and tenure. Now every opportunity is ranked by behavioral fit. We're not pitching more — we're pitching smarter. The conversion rate change in the first six months was enough to fund the entire platform.”

— Michael Skaufel, CRO (Influencer) — Sirius Resources

The CTO — Human-Centric Technology Architecture

For Michael Rodriguez, the CTO (DNA Style: Engager), Lighthouse Insights was the most complex systems integration in the firm's history — and the most behaviorally intentional. His mandate was not simply to connect 12 technology modules. It was to ensure that the technology layer was **invisible to consultants and leaders**, surfacing intelligence at the right moment in the right format for each person's natural behavioral style.

- **Centralized Data Foundation:** CRMs, HR systems, financial platforms, and productivity tools unified into a single behavioral intelligence layer — eliminating fragmented, siloed data across 4,000 consultants.
- **Human-Tech Interface Design:** Adoption barriers identified and addressed by behavioral profile — high-relationship-style consultants onboarded differently from high-analytical-style engineers.
- **AI Fusion Layer:** Machine learning continuously integrating behavioral, financial, and operational data as business events, market movements, and client signals arrive in real time.
- **Near-Universal Adoption:** A rare outcome for enterprise AI — achieved by designing for behavioral fit, not forcing feature adoption.

The CMO — From Segments to Segment-of-One

For Susan, the CMO (DNA Style: Stylish Thinker), Lighthouse Insights ended the era of demographic marketing. Every campaign, every touchpoint, every client communication is now calibrated to the individual's behavioral profile — not their industry, title, or revenue band. This is the promise of **hyper-personalization at industrial scale**: every client feels they are receiving individually designed attention regardless of their account size.

- **Behavioral Segmentation Engine:** Content, tone, channel, and timing adjusted for each DNA Behavior style group — visual leaders receive dashboards, narrative-style leaders receive stories, analytical leaders receive data.

- **Campaign Intelligence:** Behavioral analysis of what each segment opens, clicks, and acts on — creating a continuous feedback loop that makes every campaign smarter than the last.
- **Enhanced Communication Segmentation:** Marketing, sales, engagement, and work product messaging tailored by behavioral profile — moving from broadcast to conversation.

How Lighthouse Insights Works: The Four Integrated Layers

Once the leadership team's Co-Pilots were activated, Sirius Resources deployed the full Lighthouse Insights platform across all 4,000 consultants through four integrated layers that operate as a single, continuously learning behavioral intelligence engine. Aristotle DNA — the Decisioning Digital Twin at the heart of the platform — coordinates every layer.

01 CENTRALIZED DATA FOUNDATION

Robert (COO) and Carlos (CIO) unified all organizational data — CRMs, HR systems, financial platforms, productivity tools, and meeting intelligence — into a single behavioral intelligence layer. No recommendation is made from fragmented, siloed data. Every leader's Co-Pilot draws from the same real-time data architecture simultaneously.

02 MASS BEHAVIORAL PROFILING

Raj (CHRO) oversaw the most ambitious profiling initiative in the firm's history. DNA Behavior's Digital Scan processed all 4,000+ consultants and the firm's entire Fortune 500 client dataset — approximately 10 million people — in a single batch. Each person received 4,000+ psychometric measures covering emotional drivers, financial behaviors, communication style, decision patterns, stress responses, and instinctive risk posture. **No manual profile completion required.**

03 AI FUSION LAYER

The CTO's team activated the AI Fusion Layer — continuously integrating behavioral, financial, and operational data via machine learning as business events, market movements, life events, and interaction signals arrive. Post-interaction AI tools auto-generate meeting notes, CRM entries, analyses, and follow-up actions. Every interaction makes the system smarter. The organization's behavioral intelligence compounds over time.

04 BEHAVIORAL WORKFLOW INTEGRATION

Robert (COO) and Meena (CSO) activated seven integrated workflow streams: Leader-Consultant-Client Style Matching, Workforce Optimization, Business Mood Analysis, Leader Financial Value Creation, Enhanced Communication Segmentation, Behavioral Decision Guidance, and Succession Planning. Every stream operates at the individual behavioral profile level — never by demographic average.

THE NEW LEADERSHIP EXPERIENCE — EVERY DAY

For every leader at Sirius Resources, the Aristotle DNA Co-Pilot delivers a structured daily operating rhythm. Each morning begins with a behaviorally prioritized briefing: the top 3 highest-value decisions or conversations for that leader's role, calibrated to their own DNA behavioral style. Before every significant meeting, a full behavioral briefing on every attendee is surfaced — communication style, decision pattern, trust triggers, and stress responses. After every interaction, auto-generated notes, CRM updates, and follow-up strategies are reviewed and approved in minutes rather than hours.

- **Next-Best Conversation Recommendations** — exact topic, framing, and channel most likely to resonate with each client today.
- **Curated Research & Insights** — filtered and formatted to match each client's information processing style and depth preference.

- **Personalized Communication & Report Drafts** — generated for leader review and approval; tuned to each client's DNA profile and engagement history.
- **Business Event Response Strategies** — proactive outreach whenever a market or business event is likely to affect a client's behavioral state or decision-making quality.

Results, Strategic Implications & Financial Impact

Consultant and leader adoption reached near-universal levels within months — a rare outcome for any enterprise AI initiative at this scale. Nora’s framing of the initiative was a critical driver: **AI enhances, never replaces, the human leader and consultant.** Machines handle data synthesis, pattern recognition, and first-draft creation. Leaders and consultants deliver connection intelligence — reading subtle cues, framing complex trade-offs, coaching behavior through uncertainty, and building the trust that creates lasting organizational value.

“Lighthouse Insights does not commoditize our consultants — it elevates them. It gives every leader in this firm superpowers: personalized, behavioral guidance at industrial scale, so every client receives high-touch service regardless of their revenue size. That’s not an efficiency story. That’s a competitive moat.”

— Nora Valdez, CEO (Influencer) — Sirius Resources

THREE ENTERPRISE-LEVEL STRATEGIC ADVANTAGES

LEADER & CONSULTANT CAPACITY

12–18 hours per week per employee reclaimed from administrative tasks, fragmented research, and manual reporting — redirected entirely to client acquisition, relationship deepening, and high-value behavioral consulting.

DECISION CONSISTENCY AT SCALE

Behavioral guardrails embedded in every leader’s Co-Pilot reduce mis-suitability risk across a diverse organizational client base. Decision Cascade Syndrome — the pattern where one reactive decision triggers a chain of poor choices — is actively detected and interrupted.

SCALABLE PERSONALIZATION

“Segment-of-one” advice for every client, regardless of size or complexity. The 80/20 rule — where 80% of personalization was reserved for 20% of top clients — is permanently eliminated. Sirius now delivers 98% personalization for 98% of its client base.

FINANCIAL IMPACT AT SCALE

12–18 hrs Per week, per employee reclaimed	\$115K–\$300K Additional profit per consultant annually	\$460M–\$1.2B Additional firm-level profits unlocked	23%+ Revenue growth through personalization
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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.

WHAT COMES NEXT — THE LIGHTHOUSE PLATFORM INSTRUCTIONS

This case study is the strategic context for the Lighthouse Insights Platform — the complete operating system for human-led, AI-powered organizational performance. The next document — the **Lighthouse Insights Platform:**

Business Performance Edition, delivered by Aristotle DNA — provides the full operating instructions for deploying this transformation within your organization. It covers every C-Suite Co-Pilot, every employee operating mode, all 12 technology modules, the implementation roadmap, and the complete DNA knowledge architecture that powers Aristotle's behavioral intelligence. The shift from managing numbers to developing people starts here.

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DNA Behavior SDK & API: www.dnabehavior.com/api