

Business DNA[®] Journey Map Overview



DNA Behavior®

Serving Your Clients as a Trusted Performance Advisor

Business DNA® Journey Map Overview

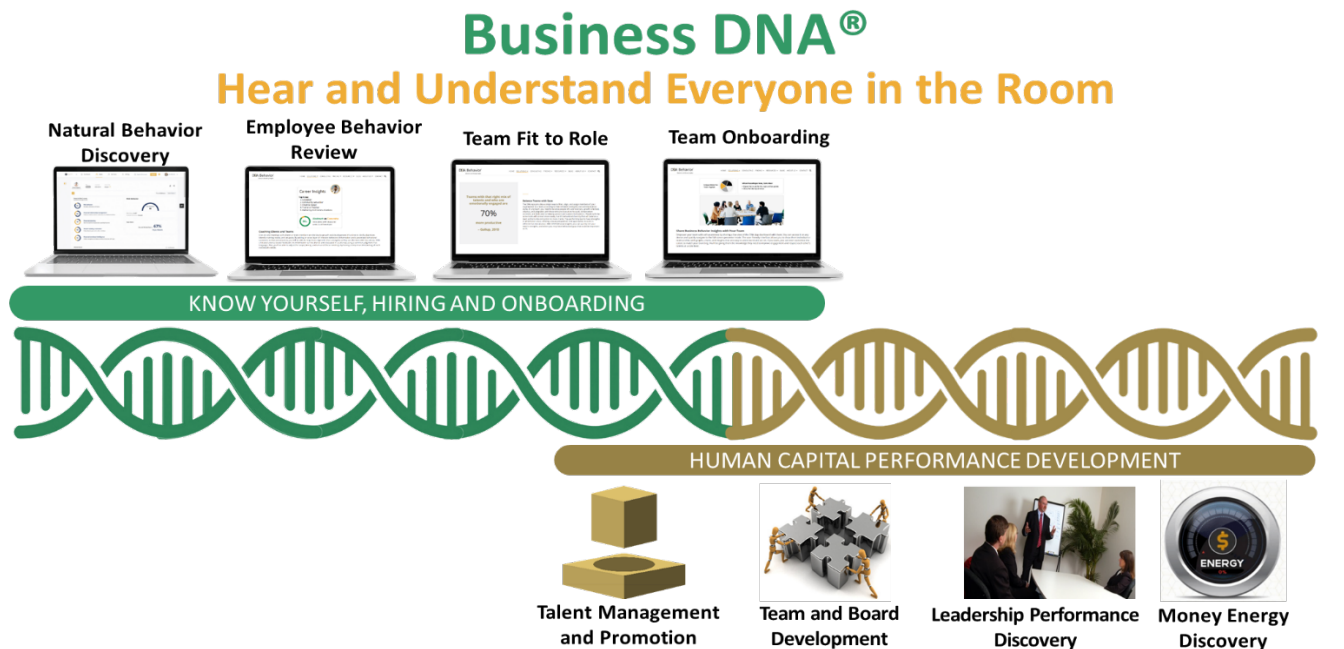
If you are a coach, consultant, facilitator, or trainer who is playing a role in serving individuals and teams (or families) with the making of life and business decisions, the following **Business DNA® Journey Map Overview** is designed to help you design your process with the inclusion of Business DNA®. The process will inherently vary depending on the exact terms of the role you are retained to provide. In reading this summary, please reference the “Business DNA Journey Map” illustrated below.

Facilitating Your Clients

We recommend that you consider positioning yourself as a trusted “Performance Advisor” in the life of your client. The Performance Advisor guides their clients by firstly adopting a coaching approach through asking behavioral based questions. If you are playing a consulting, facilitator or trainer role then as a second step advice can be provided with the making of recommendations.

To get started with understanding your and the client’s responsibilities in a Performance Advisory Relationship, please review **Serving Your Clients as a Performance Advisor Guide**.

Thereafter, our suggested Business DNA roll-out journey is summarized below.



Know Yourself, Hiring and Onboarding

1. Your initial pre-engagement meeting with a prospective client, whether by phone, zoom or in person, is a general get-to-know-them session and an initial setting the scene for your service. Some advisors give the prospective client the **Business DNA Natural Behavior Discovery** to complete before any interaction (taking on average 10 minutes). Their objective is to customize communication and pick up on any big issues lurking to tailor their relationship building conversation.
2. Once the prospect is signed up as an engaged fee-paying client and going through the background fact-finding process with you, then the Business DNA Natural Behavior Discovery Process should be completed by the leader and all involved in the team being served, before the first performance discovery meeting. Use the **Employee Behavior Review - Know Yourself Modules**. That will then help you:
 - Customize communication for the leader and team.
 - Assign the right performance advisor to the leader and team.
 - Tailor initial performance discovery questions using the **DNA Coaching Insights Guide**
 - Address the leader and team member's strongest strengths and struggles for performance.
 - Identify whether there is a team talent fit to the roles and what talents are needed to fill team gaps using the **Candidate Fit tools and Benchmarking Process**.
 - Draw out mis-alignments and perception gaps in key areas between what the leader or employee says and who they are.
 - Design a reliable hiring process using the Business DNA Hiring insights and also the **Building Your Hiring Performance Process Guide, Pre-Interview Checklist and Hiring Talent Assessment Checklist**
 - Use the Comparison (Relationship) Report and Team Report features to bring out differences in the team and for onboarding new employees, including using the **Onboarding Process Checklist**.
3. The Business DNA Natural Behavior Discovery only needs to be completed one time given it reflects "hard-wired" behavior. However, It would help if you always referenced Business DNA Natural Behavior in every leader, employee or team performance review meeting through the client business life cycle.
4. Further, the Business DNA Natural Behavior Discovery can be introduced at annual review meetings or transition events for your existing clients.

Enhanced Human Capital Performance Development Opportunities (Requiring Additional Meetings)

5. Following the DNA Natural Behavior Discovery Process steps outline above, a deeper "**Human Capital Performance Review**" can be conducted to address team performance issues, including:
 - **Employee Talent Management Reviews** on a semi-annual basis to determine the extent to which the employee is operating in alignment with their "X-Factor"
 - **Promotion Talent Assessment** to determine if the employee should be promoted and/or given a remuneration adjustment.

- **Rogue Employee and Internal Control Reviews** to identify which employees may require additional monitoring with additional supervision metrics and/or warning signals.
6. We recommend that the Business DNA Natural Behavior Discovery (Work Talents) is then discussed as part of addressing the other issues you would normally raise in the context of addressing the team (or board) issues and decisions to be made. Use the **Team and Board Performance Review Tools**:
 - (i) The first discovery meeting is with the leader to identify their performance strength and struggles, and the deeper behavioral issues which may be impacting their leadership or life, recognizing they are not separate discussions.
 - (ii) The second set of discovery meetings is with each team member to identify their performance strength and struggles, and the deeper behavioral issues which may be impacting their team contribution or life, recognizing they are not separate discussions.
 - (iii) Before a team meeting is conducted, you may need an additional meeting with the leader to discuss specific team member performance and interaction issues that have arisen, hiring for talent needs and other business matters.
 - (iv) Depending on the issues at stake and the decisions to be made, addressing at least the leader's money attitudes and relationship to money will be important.
 7. If you want to coach the leader and/or employee's at a deeper level, they can be provided with the following additional "**DNA Performance Review Tools**", along with deeper facilitation using questions.
 - **Leadership Performance 360 Discovery**
 - **Employee Performance 360 Discovery**
 - **Sales Performance 360 Discovery**
 - **Advisor Performance 360 Discovery**
 - **CEO Performance Review Checklist**
 - **Employee Values Discovery**
 - **Work Life Performance Discovery**
 - **Entrepreneurial Performance Discovery**
 - **Career Preferences Discovery**
 8. In addition, we have a range of Coaching, Mentoring and Facilitation tools, such as an **Identity Empowerment Workbook** to deepen the experience and performance transformation.
 9. As an additional step in performance facilitation with leaders you can have them complete the **Money Energy Discovery** to measure their level of Money Energy and determine how money attitudes are impacting their leadership decisions and could be better integrated into their overall life. This step will open up the ability to lead **Money Energy Conversations** addressing deeper Life Purpose, Identity, Quality Life, Relationship to Money Integration and decision-making issues with more pin-pointed questions. You can make this an additional discovery meeting. The Money Energy Discovery involves completion of the following two discoveries:
 - **Quality Life Performance Discovery**
 - **Money Energy Opportunities Discovery**
 10. On an ongoing basis, the clients can re-complete the Performance Discovery Processes and/or Money Energy Discovery on an annual basis to measure progress and identify what areas need further development.

If you would like to learn more, please consider participating in the following:

1. Business DNA Accreditation Training (online)

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2. Business DNA Certification Training (in person)
3. Money Energy Conference (in person)
4. Money Energy Conversations Training (hybrid online and in person)

To learn more about DNA Behavior International and the solutions we offer, please visit: www.dnabehavior.com

If you have any questions or would like to discuss with an executive on our team, please email us at: inquiries@dnabehavior.com

