# **Joint Evaluation Pre-call Information**

Please provide detailed responses to the following questions to ensure an efficient and productive technical sales discussion.

1. **Company & Project Details:**
   1. **Company Name:**
   2. **Leader Name:**
   3. **Project Name:**
   4. **Date of Completion:**
2. **Challenges and Goals:**
   1. What specific problem are you trying to solve with your project?
   2. How do you believe understanding behavior will help solve this problem?
3. **Experience Focus:**
   1. Is your project focused on improving **Client Experience (CX)** or **Employee Experience (EX)**?
   2. What specific behavioral insights are you interested in obtaining (e.g., factor and subfactor scores, decision-making patterns, communication styles, financial behavior)?
4. **User Access Requirements:**
   1. How many **Named Users** will require access to the DNA Behavior system? (Named Users are those with unique login credentials to manage or interact with the system.)
5. **Participant Expectations:**
   1. How many **Participants** (clients, employees, etc.) do you expect to complete the **Natural Behavior Discovery**?
6. **Technology Interest:**
   1. Are you interested in utilizing the **DNA Behavior Digital Scan** technology for your project? If so, describe how it will be used. (The DNA Behavior Digital Scan is an AI-based forecast of a participant’s behavioral style.)
7. **Account Setup:**
   1. Will your project require **multiple accounts** or just a single account for all users and participants?
8. **Integration with Your Tech Stack:**
   1. Which systems or platforms does your company currently use that you would like behavioral data to integrate with?  
      (Examples: CRM, HRIS, LMS, financial platforms, etc.)
9. **Project Timeline:**
   1. What is your ideal **start date** for this project?
10. **Additional Project Needs:**
    1. Are there any other specific needs, challenges, or project requirements that our team should be aware of before our call?