DNA Behavior®

The Behavior and Money Insights Company
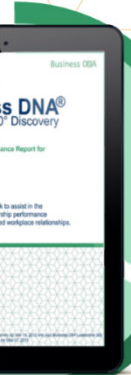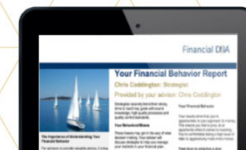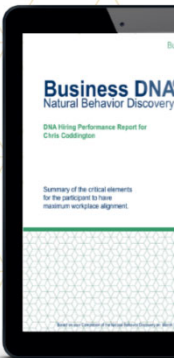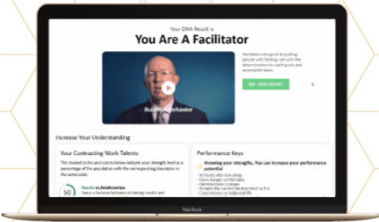
Standard Account Configuration

DNA Behavior
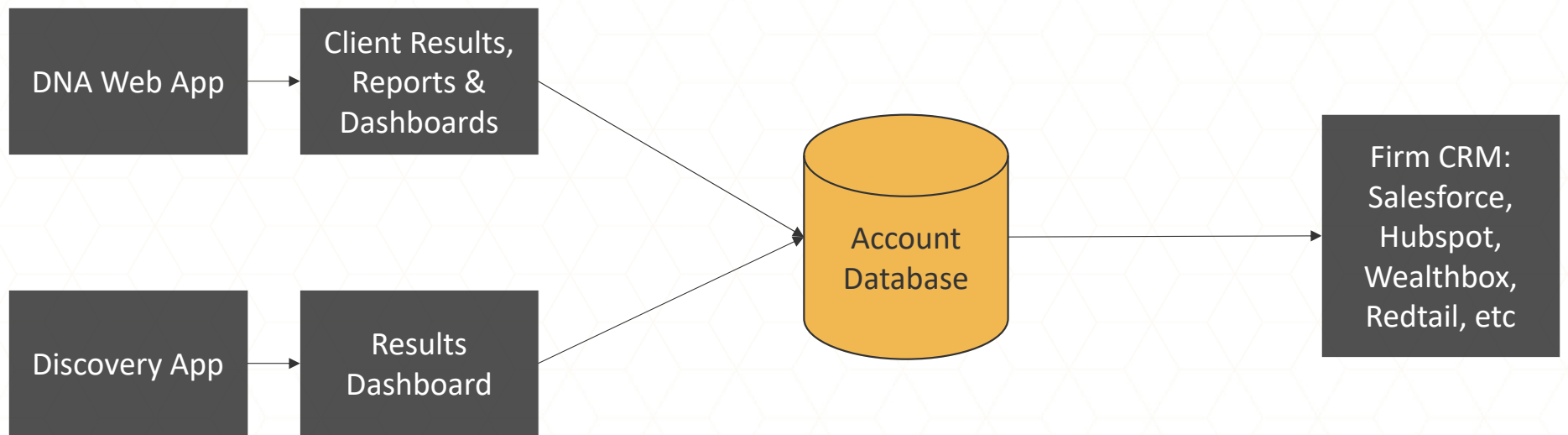
Optional Enterprise Customizations

Platform SSO

Account Admin SSO

DNA Web App → Client Results, Reports & Dashboards → Custom Reports

Discovery App → Results Dashboard
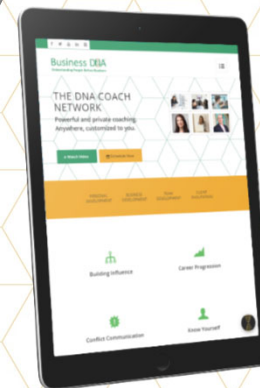
Firm Client Portal

Custom Reports

Account Database

Product Matching

Rep Matching

Behavioral Marketing

DNA API & Zapier

Firm CRM: Salesforce, Hubspot, Wealthbox, Redtail, etc

Digital Scan

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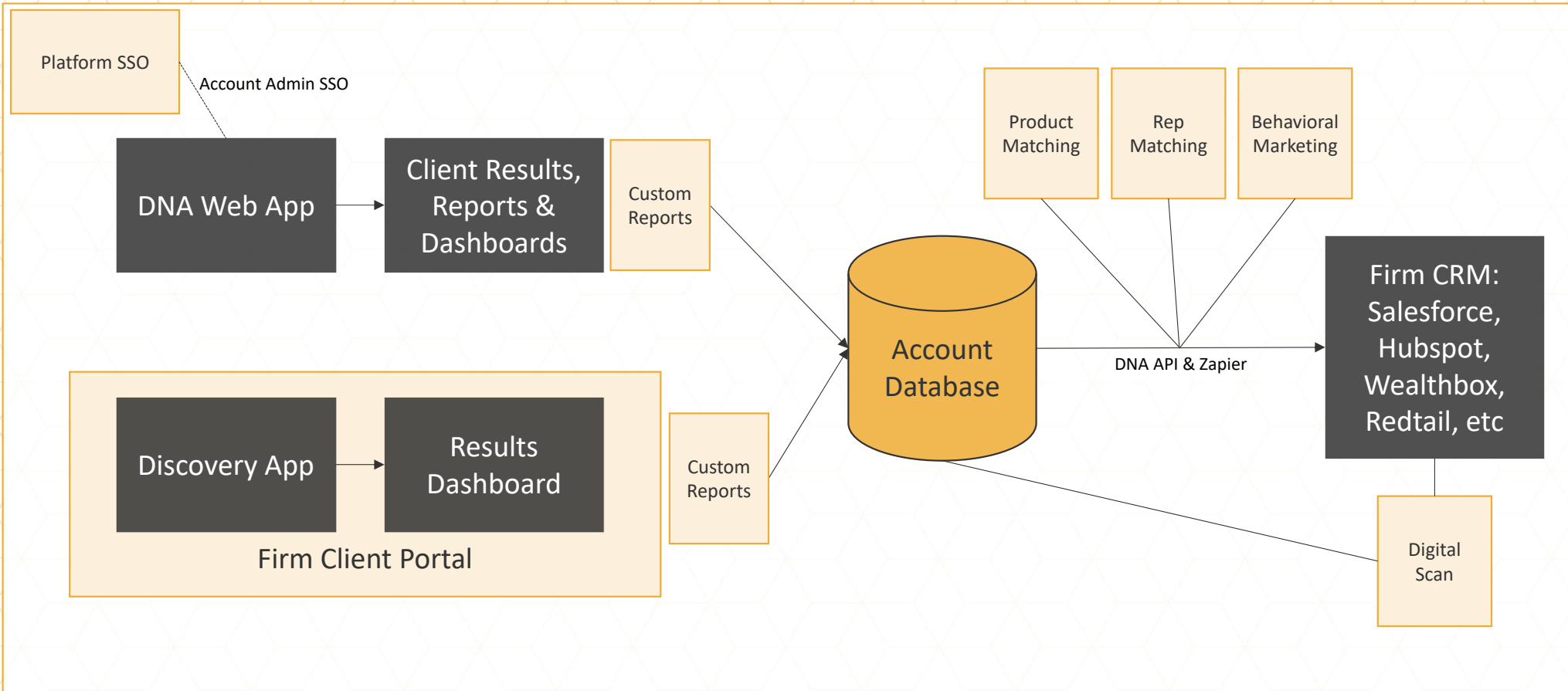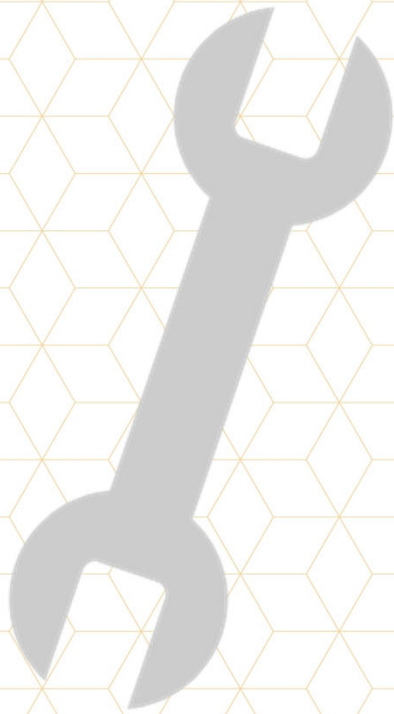
DNA Behavior

Bolt-on Upgrades:

- Configurable Coaching Report
- Embedded Discovery
- Digital Scan
- Advanced Lookups

DNA Behavior

Account Admin Single Sign On

Here's What You'll Get:

- **Seamless Access:** Enables account admins in Fidelity Wealthscape to auto-login to DNA Behavior, removing the need for extra credentials.

- **Enhanced Security:** Reduces risk by limiting login requirements, minimizing password fatigue.

- **Boosted Productivity:** Simplifies access, allowing advisors to focus on clients rather than managing multiple logins.

- **Integrated Workflow:** Provides direct access to DNA Behavior from Fidelity Wealthscape, enhancing efficiency.

Fidelity Wealthscape^{SM}

Connect your DNA and Wealthscape Accounts

DNA Behavior
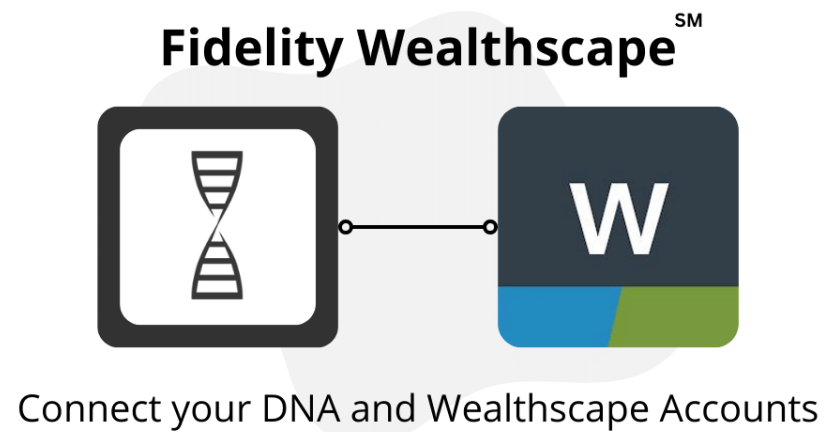
Client Portal Integration

Here's What You'll Get:

- **Branded Native Experience**: This integration allows enterprises to maintain full control over the user experience, ensuring the questionnaire fits seamlessly within their own branded environment on their website.

- **Seamless Integration**: Developers can embed the DNA Behavior questionnaire directly into a client portal using an iframe, offering a smooth user experience without the need for additional software.

- **Password-Free Access**: Clients can connect to the DNA Behavior discovery and view their results without needing a separate username or password, as authentication is handled through the client portal.

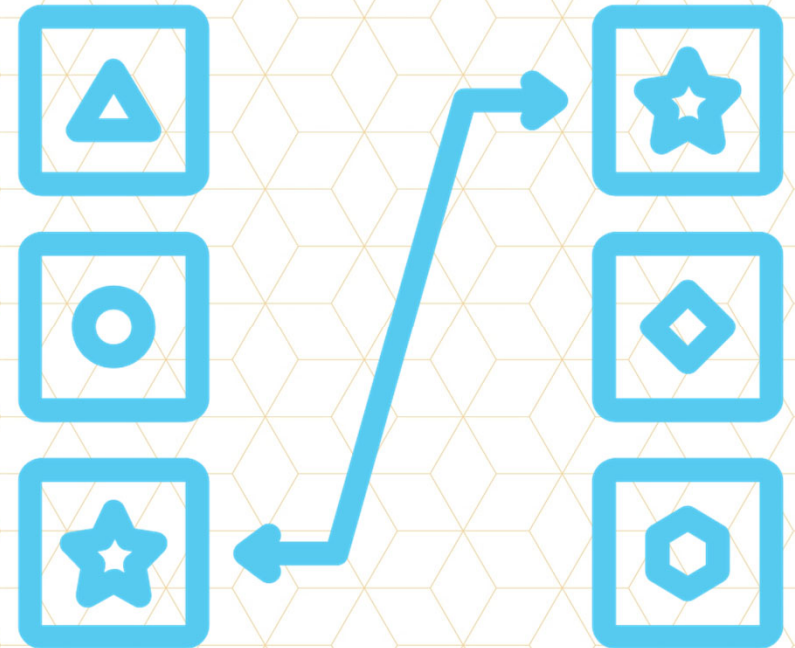DNA Behavior

Custom Reports

Here's What You'll Get:

- **Custom Report Design:** Work with our team to design, build, and deploy a report tailored to your business. Whether you need a concise executive summary or a detailed, multi-page analysis, we can deliver it in any format and language you require.

- **Brand Integration:** Make your report truly yours. We'll incorporate your logo and branding colors, ensuring the final product aligns with your corporate identity and strengthens your brand's presence.

- **Flexibility and Control:** You dictate the terms of your report—choose the length, design, and structure that best meets your needs.

Logoipsum

Work Talents Report:
Jill Johnson

Providing key insights into your unique work talents.

Based on your completion of the Natural Behavior Discovery Process

Powered by DNA Behavior

DNA Behavior

Product Matching

Here's What You'll Get:

- **Behavioral Product Matching:** Leverage DNA Behavior's insights to connect clients with products tailored to their behavioral attributes, enhancing personalization and relevance.

- **Custom Lookup Key:** Our team collaborates with you to create a bespoke lookup key that aligns your products with specific behavioral traits, ensuring accurate and effective recommendations.

- **Integrated Data Management:** The matching results can be seamlessly integrated into your CRM or other technology systems, allowing product recommendations to live alongside existing client data for a unified view.

DNA Behavior

Rep Matching

Here's What You'll Get:

- **Personalized Rep Matching:** Align clients with the most suitable client-facing reps using behavioral insights, enhancing service personalization and effectiveness.

- **Custom Lookup Key:** Collaborate with our team to develop a bespoke lookup key that matches clients to the right representatives with precision.

- **Seamless CRM Integration:** Integrate the matching data into your CRM, enabling automated workflows that align with your existing operations for optimal efficiency.

DNA Behavior

Behavioral Marketing

Here's What You'll Get:

- **Targeted Marketing Strategies:** Leverage DNA Behavior insights to tailor your marketing efforts, ensuring content resonates with specific audience segments based on proven behavioral research.

- **Improved Engagement:** Utilize research-backed data to predict which individuals are more likely to engage with certain content, optimizing your campaigns for better results.

- **Integrated Data Utilization:** Feed DNA Behavior data from your account database directly into your CRM or marketing automation platform, enhancing your ability to refine and improve key marketing KPIs.

DNA Behavior

Digital Scan

Here's What You'll Get:

- **Pre-Discovery Data Enrichment:** Enhance your data with behavioral insights even before clients participate in the full DNA Discovery process, allowing you to leverage early behavioral predictions.

- **Versatile Application:** Utilize enriched data for behavioral marketing, rep matching, or financial product matching to improve personalization and client engagement.
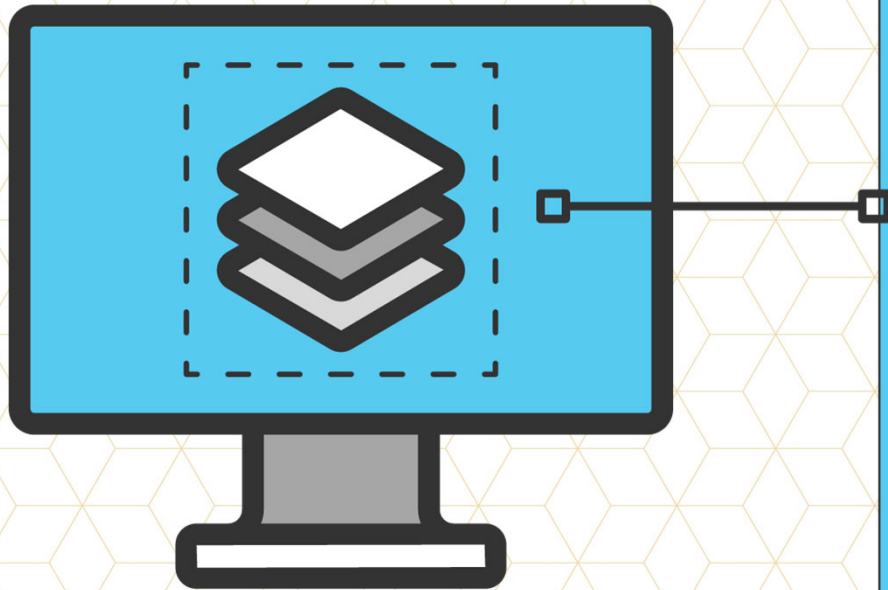

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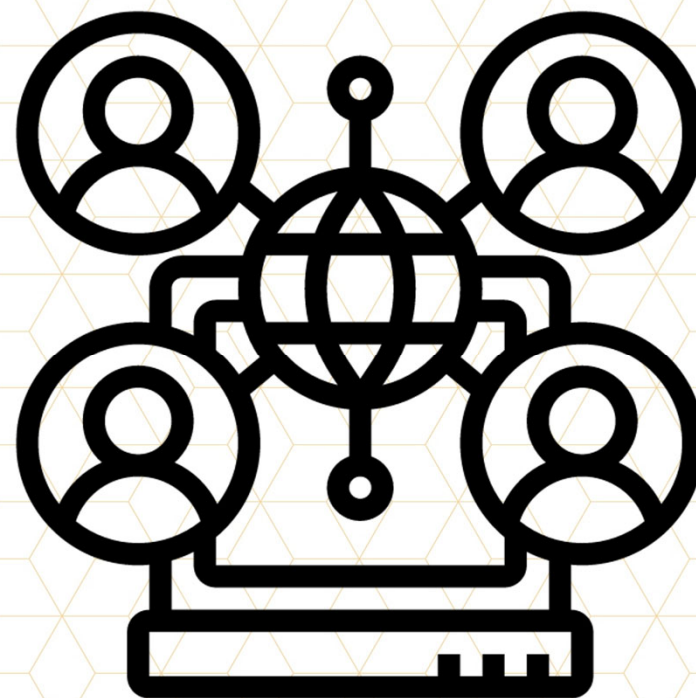
Supercharge Your Self-Registration
Embed the Discovery into your Tech Stack
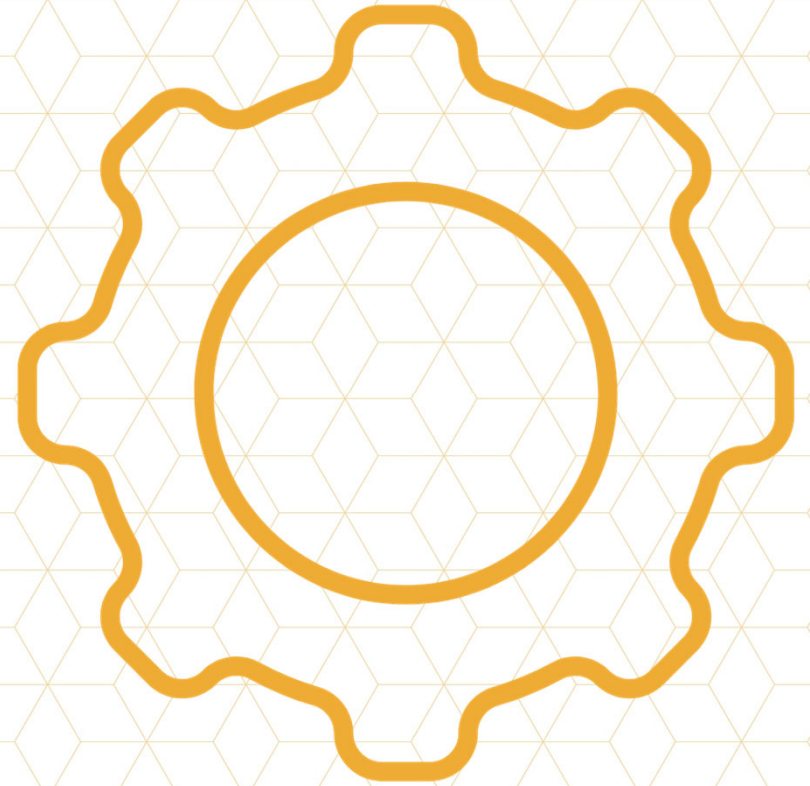
DNA Behavior

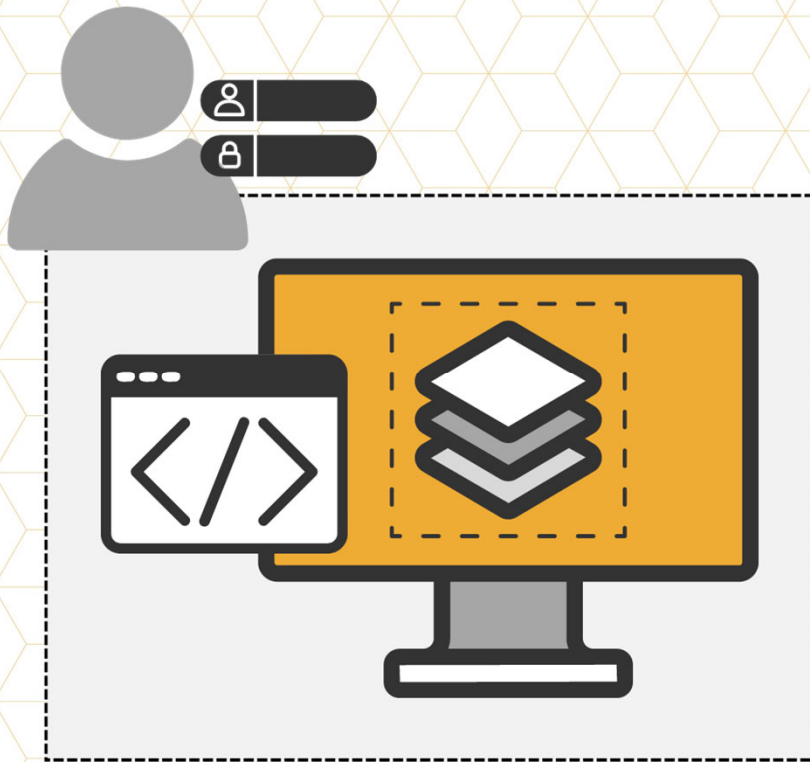# Embedded Discovery Solutions

Ready to use integrations for:

- Client Portal
- Employee Training and Development
- CRMs
- Talent Management Systems
- Customer Support Systems
- Retail websites
- E-learning Site

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DNA Behavior

How Embedded Discovery Works

- Works within the existing settings and options of DNA Behavior's native self-registration process.

- Key settings include:
  - **Tags**
  - **Account Admin Selection:** Advisor, Coach, Leader, Consultant, HR, Team Lead, Trainer
  - **Discovery Settings:** Talent or Investor
 - **Insights:** Shown on the completion screen

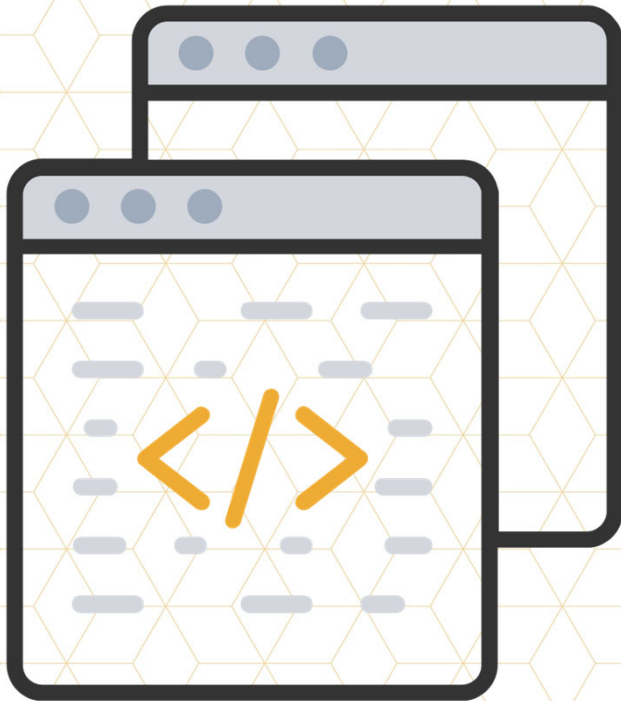DNA Behavior

Benefits of Embedded Questionnaires

- Seamless experience for participants; no need for DNA Behavior username and password.

- Can be embedded within your client portal, intranet, or website.

- Direct integration into your existing systems.

DNA Behavior

Types of Embedded Discoveries

- **Standard Embedded Discovery:** Basic setup with standard features.

- **Custom Embedded Discovery:** Tailored setup with customized features and additional functionalities.
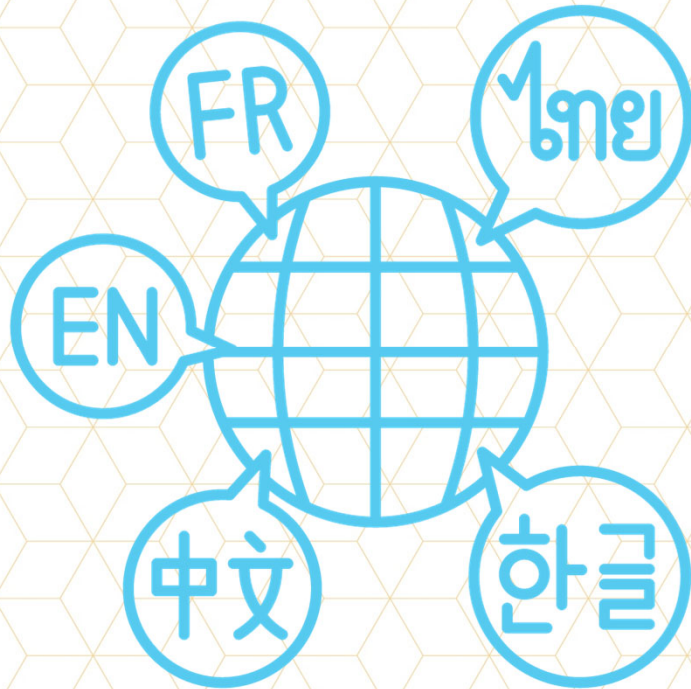

Standard or Custom?
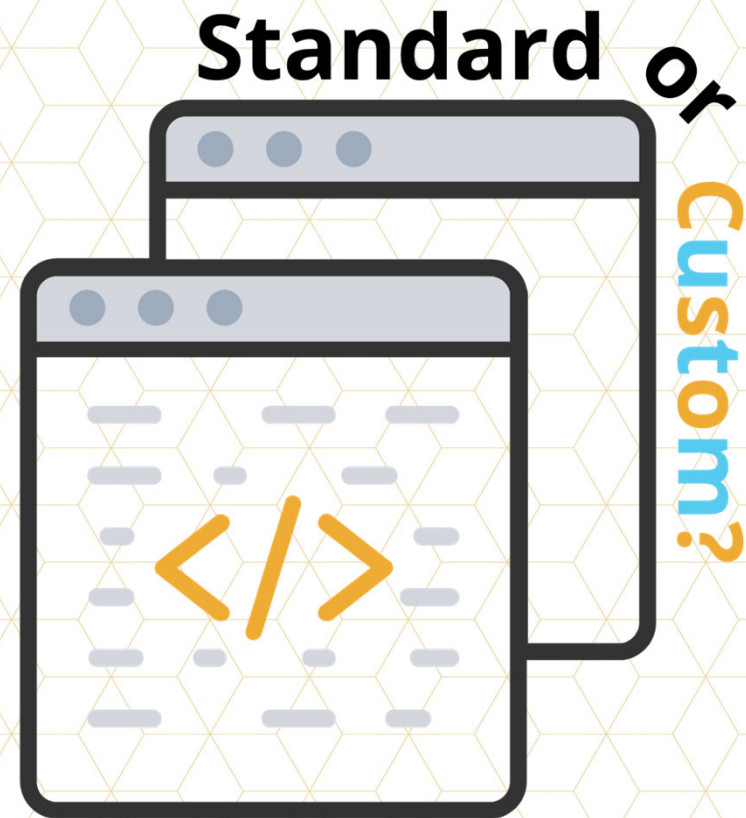
DNA Behavior

Standard Embedded Discovery Features

- Suitable for 1 account with standard discovery and functionalities.

- Options include 17 to 46 questions.

- Standard configuration for colors, fonts, and UI/UX.

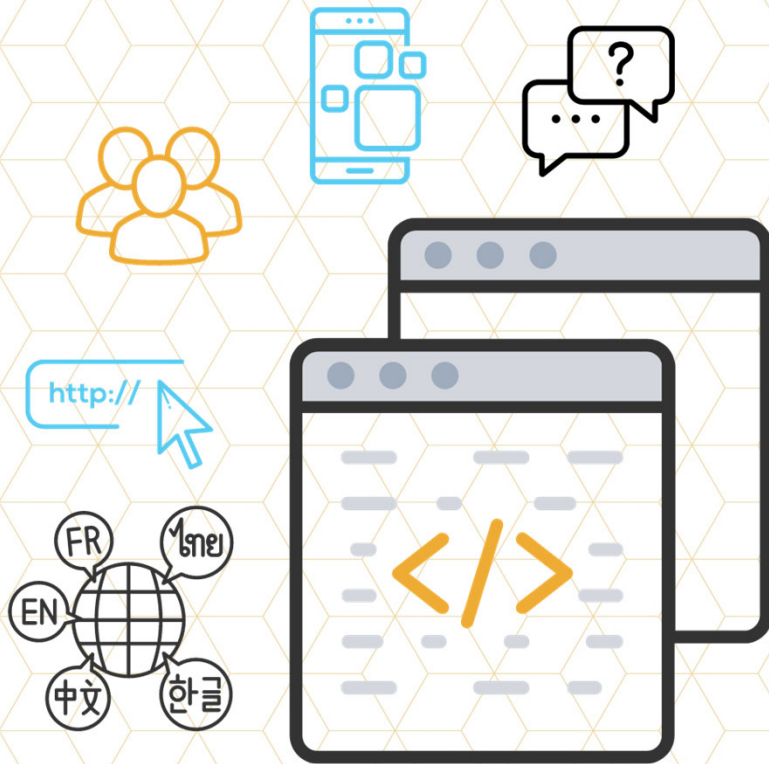- URL: embed.discovery.dnabehavior.com

DNA Behavior

Standard Languages

- Standard languages available:

  - US English
  - UK English
  - Portuguese (Brazil)
  - French (Canada)
  - Spanish (Mexico)
  - Dutch (Netherlands)

DNA Behavior

Custom Embedded Discovery

- Connects iframe to multiple accounts with advanced logic.

- Custom fonts, UI/UX, and additional features.

- Customization requires a 2-year commitment on an Enterprise Package.

- Development is billed hourly based on an agreed SOW.

- URL format:
  - FirmName.discovery.dnabehavior.com
  - For Example: AcmeCo.discovery.dnabehavior.com

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