

Enterprise Digital Scan Demo

Anonymized Data

21.82K

Clients

541

Advisors (Employees)

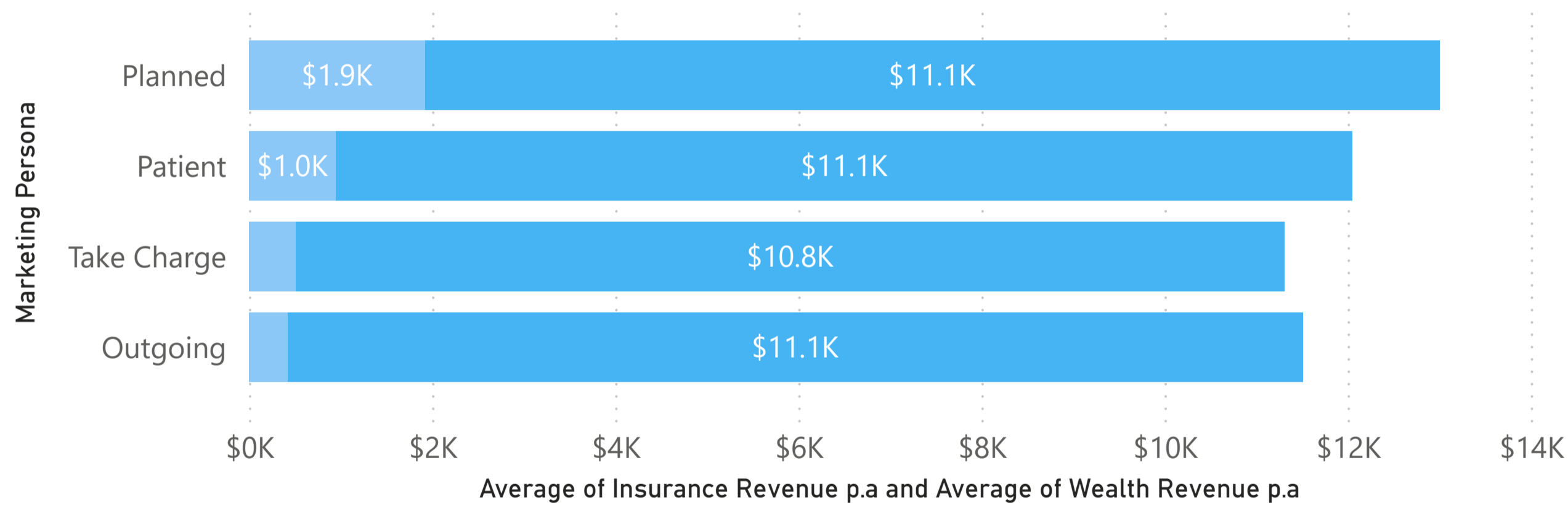
Your Team:

11

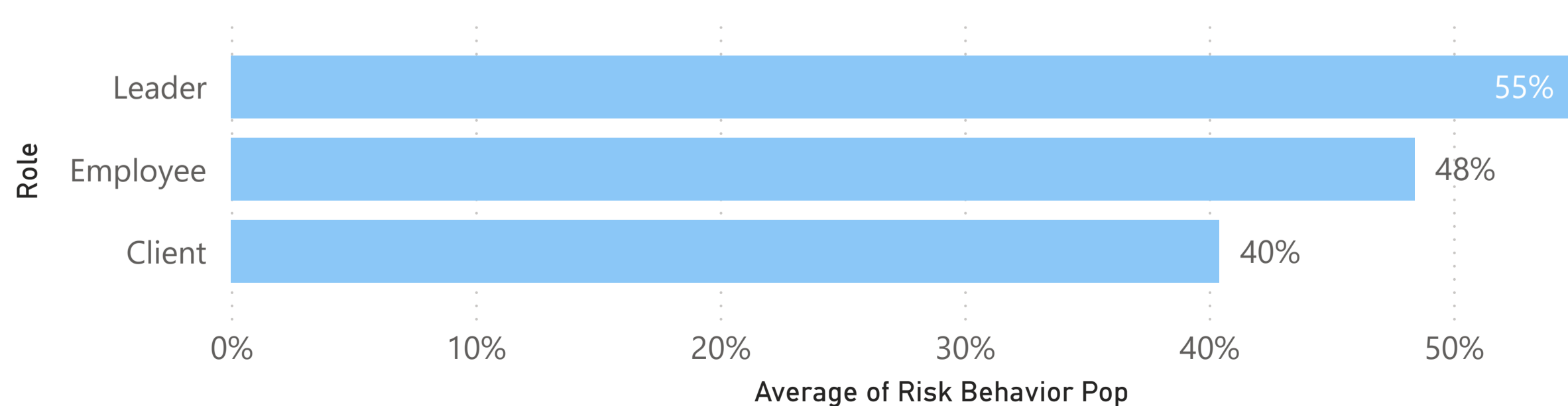
Leaders

Average Revenue by Unique Style

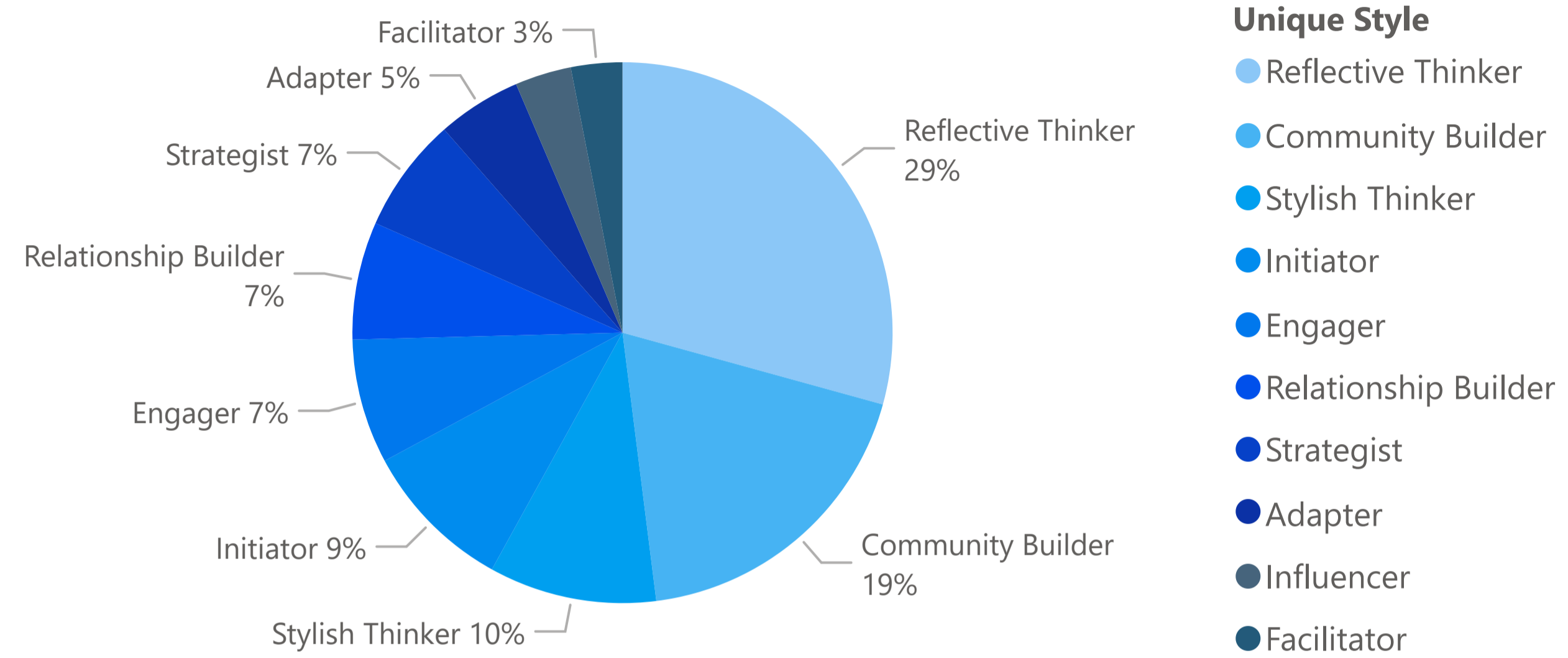
● Average of Insurance Revenue p.a ● Average of Wealth Revenue p.a



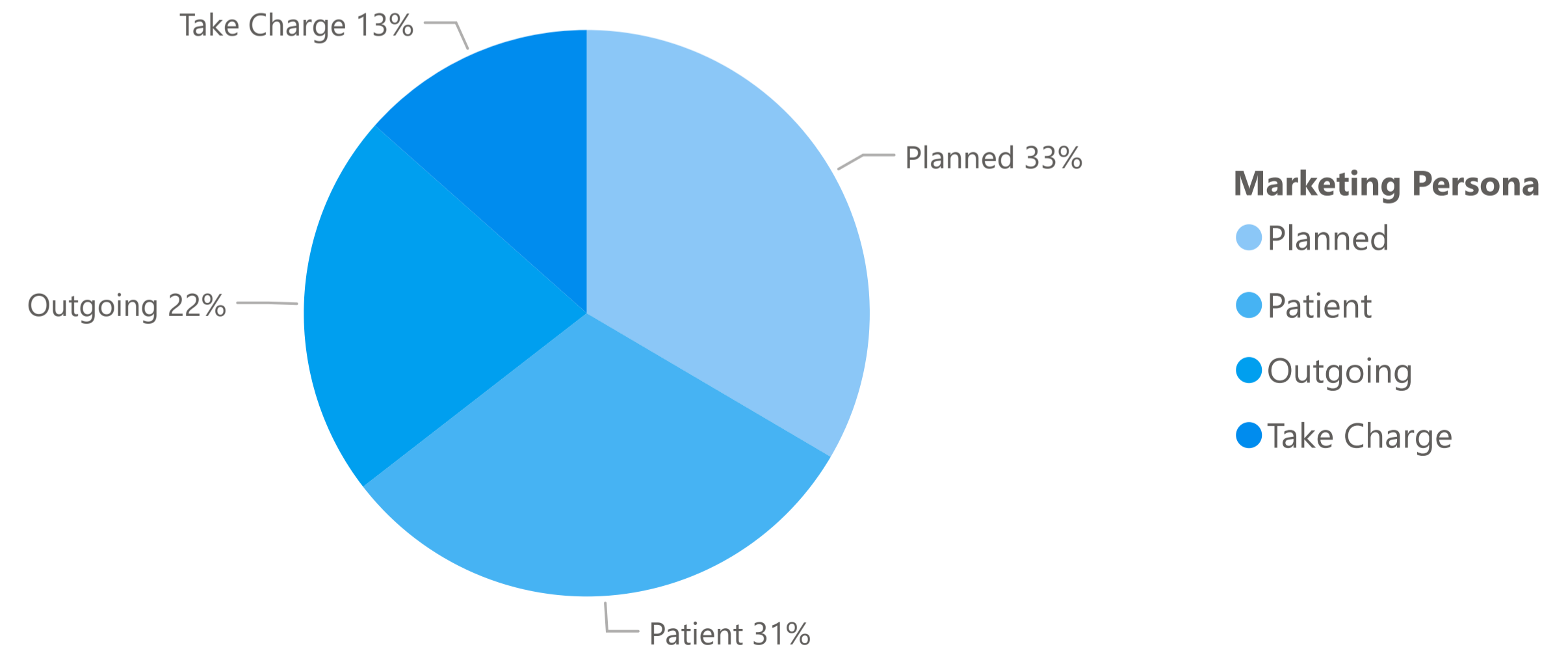
Average of Risk Behavior Pop by Role



Unique Style

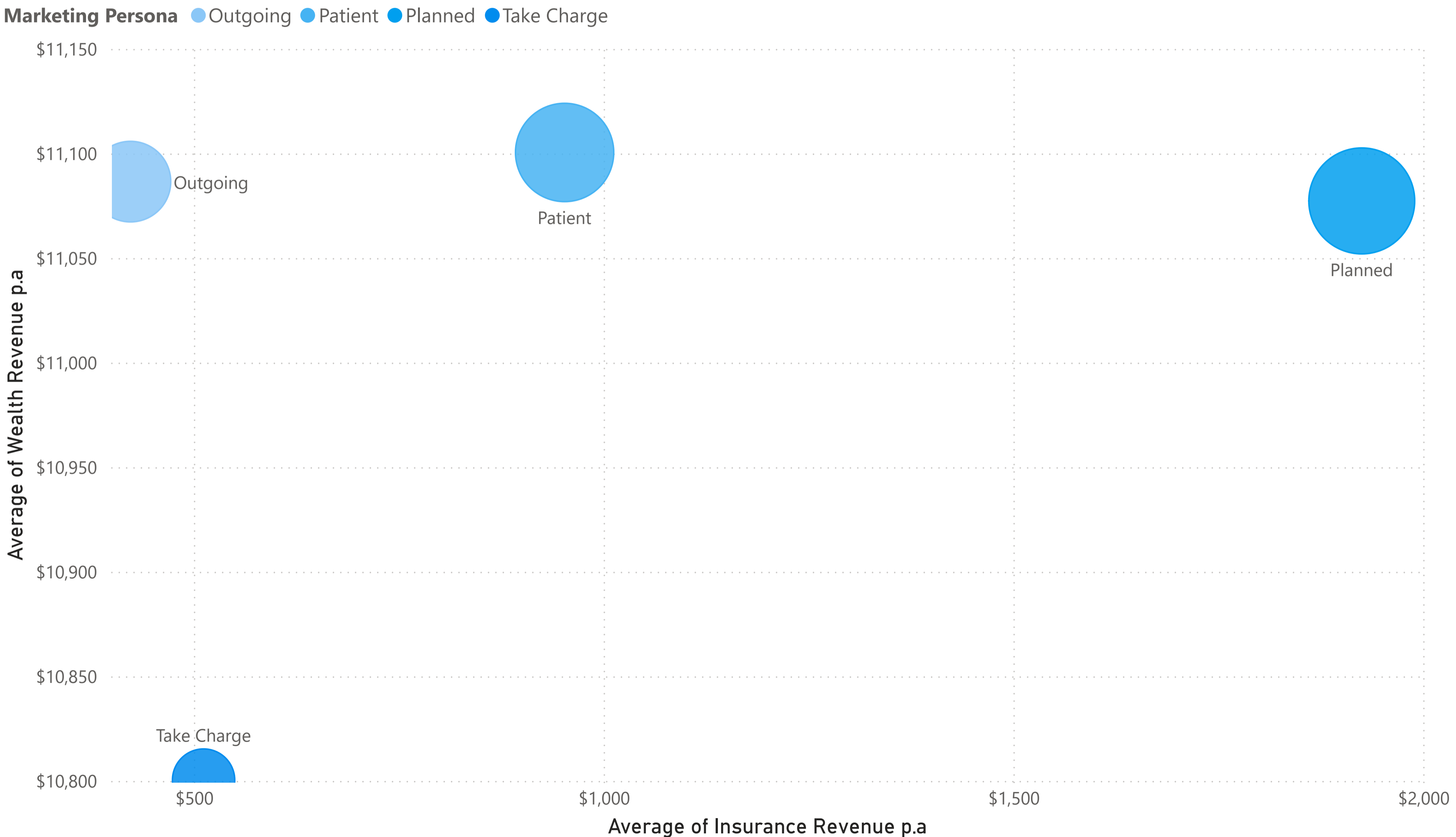


Marketing Personas



How Client Behavior Influences Revenue

Insurance and Wealth Management Revenue by Persona



Key influencers Top segments

What influences Insurance Revenue p.a. ?
to

When... ..the average of Insurance Revenue p.a increases by

- Risk Behavior Pop is 14% or less ▶ \$457.4
- Risk Behavior Pop is 14% - 38% ▶ \$155.6

Key influencers Top segments

What influences Wealth Revenue p.a. ?
to

When... ..the average of Wealth Revenue p.a increases by

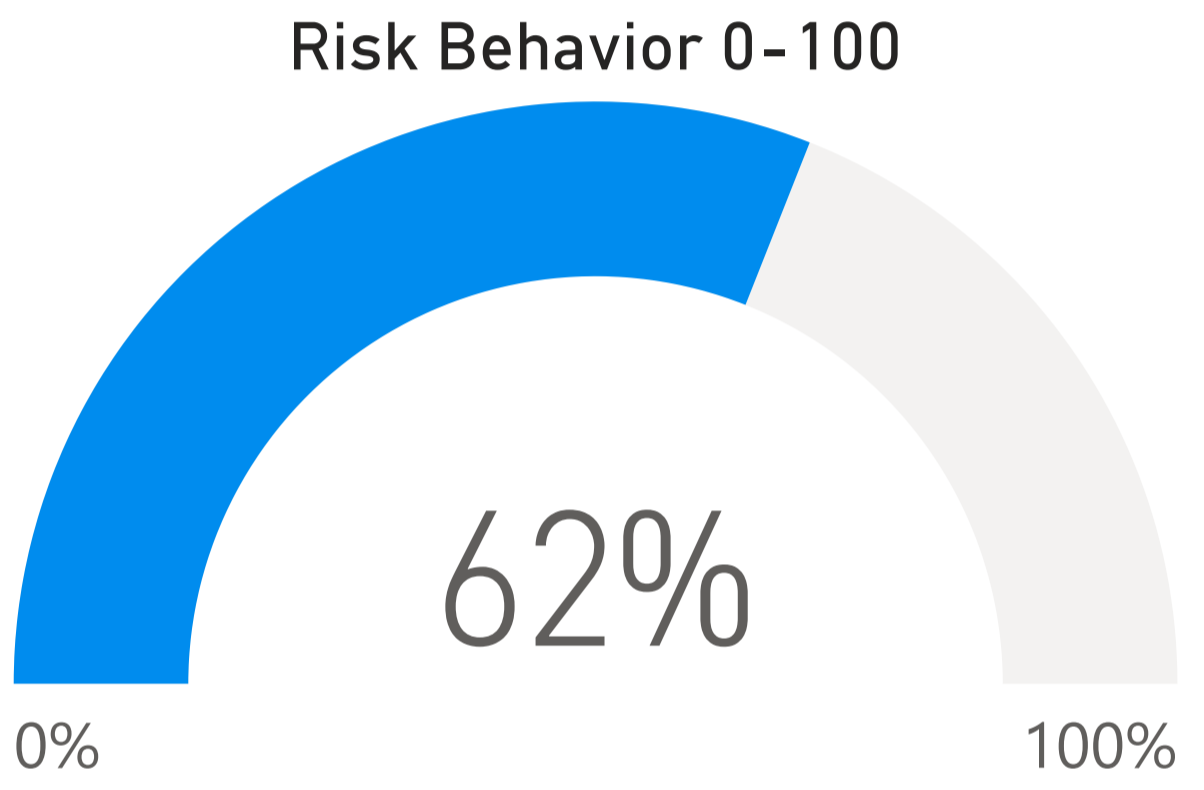
- Risk Behavior Pop goes down 0.29 ▶ \$201.1

Digital Scan of Your Team

First Name	Last Name	Unique Style	Marketing Persona	Introduction	Personal Approach	Negotiation	Closing Style
Bill	Turner	Strategist	Take Charge	Ask about their successes	Keep it business like	Allow them to win	Give them options to decide on

Choose Leader:

- Bill Turner
- Craig Brooks
- Daniel Fields
- George Pierce
- Joe Franklin
- Kassie Harper
- Kevin Lewis
- Kristin Hale
- Marc Warner
- Megan Hill
- Ryan Baxter



Accumulation

Portfolio Selection

Portfolio Selection:

DNA Behavior designs & deploys custom product-matching algorithms to map employees and clients to financial products suited for them.

- Group 1: Capital Protection
- Group 2: Ultra-Conservative
- Group 3: Conservative
- Group 4: Balanced
- Group 5: Accumulation
- Group 6: Growth
- Group 7: Aggressive

