

FINANCE WITHOUT NUMBERS

barbararsiegenthaler.com

Predictive Company Behavior Intelligence

I partner with forward-thinking organizations and visionary people to **combine 'state of the art' governance with a new type of data-driven company behavior assessments.**

As an interdisciplinary expert in law, internal auditing, and academic personality psychology, I specialize in assessing the **experiential and behavioral preferences (Patterns)** that define a company's unique 'personality'.

These **predictive company-specific patterns** profoundly impact the financial metrics, which is why I refer to my work as Finance without Numbers.

Identifying and assessing these patterns in a risk-oriented manner unlocks **new opportunities for corporate evaluation and governance.**



Barbara R. Siegenthaler
On-demand Chief HUMAN PATTERNS Officer

Swiss Attorney-at-Law | Certified Internal Auditor CIA |
Expert in PSI/ TOP Personality Psychology & Diagnostics | +41 78 901 10 74 |
info@savanteon.com | [Webpage](#) | [LinkedIn](#)

ORGANIZATIONAL PERSONALITY DIAGNOSTICS

WHAT companies think

A Company's Cognitive Content

e.g., Expertise, Knowledge Base, Plans, Intentions

HOW companies think

A Company's Experiential/ Behavioral Preferences
(‘Behavioral Patterns’)

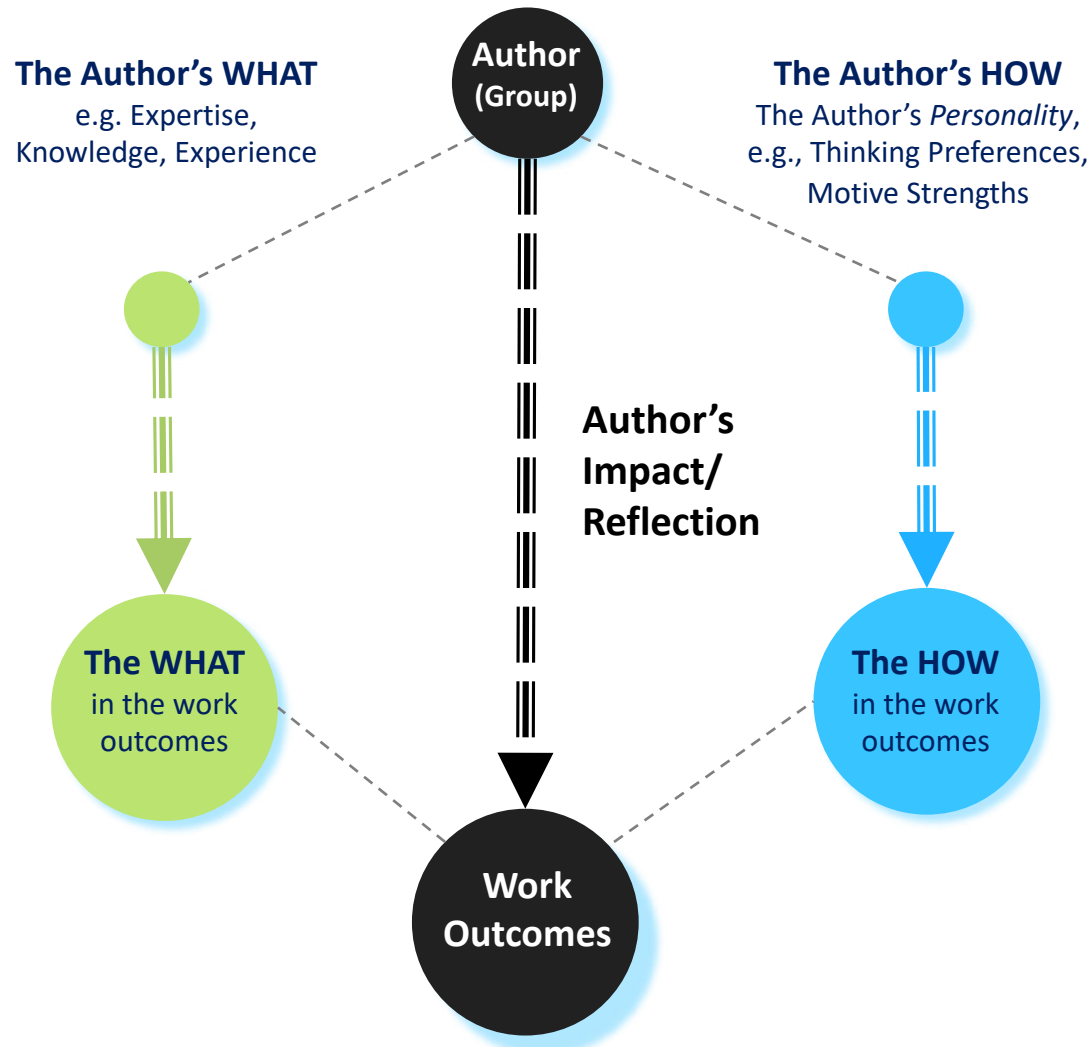
e.g., ‘trustworthy, committed, curious’ (Swisscom),
‘cautious, conservative and rational’ (UBS)

(Quotes from the websites of [Swisscom](#) and [UBS](#) as of 7 November 2023)

In reality, there is often a disparity between how companies *aspire* to think, how they *actually* think, and how they *should* think, according to external mandatory or best practice requirements

Qualitative data mirrors both the **WHAT** and the **HOW**.
With science-based strategic data mining, *Finance Without Numbers* can
extract and assess the **HOW** for improved evaluation and governance.

FINANCE WITHOUT NUMBERS PREMISES



- **Author's Impact/ Reflection:** The author or author group plays a pivotal role in shaping the work outcomes. **Work outcomes** not only showcase expertise but also **mirror the author's unique behavioral patterns (= the HOW)**
- **Based on Robust Science:** Academic [PSI/ TOP](#) psychological system theory & personality diagnostics (Julius Kuhl, 2001) with its modular structure is particularly apt for business application directly at a company level. The [German Psychological Society](#) regards PSI/ TOP as groundbreaking & highly innovative (2012).
- **Thinking Preference Insights:** *Finance without Numbers*, built upon PSI/ TOP, offers **direct insights into the behavioral patterns (= the HOW) embedded within qualitative data** (company and/or external data). Knowing the author or author group is not required anymore.



THE HOW IS PART OF A COMPANY'S SUCCESS

Three Questions shape my
consultancy, with **flexibility**
based on the client's
specific **objectives**

What **Behavioral Patterns** does a company exhibit **TODAY***, and
what are their **characteristics, pros, cons, and risks?**

1

What **Behavioral Patterns** will make the company **FUTURE-VIABLE?**
What **Behavioral Patterns** drive compliance with **external requirements*?**
What **Behavioral Patterns** will ... **[insert YOUR GOAL]?**

2

What **Ambition Levels** do you have (e.g. proactive/reactive, integration level, risk appetite)?

How to **navigate** from 1 to 2?

3

* For details please refer to slide 9 (Appendix), section 2 – *Input Data Sources*



FINANCE WITHOUT NUMBERS: TO DRIVE CHANGES THAT HAVE IMPACT

“A new theory is a lens that lets us make a new and valid prediction: The new theory does not give us new information.

It adds new insight to existing information – to the facts we knew when looking through the old lens – and sets our gaze on critical new information we can seek out.

A new way of looking at a business can also make unseen patterns visible and reveal innovative levers we can use to drive changes that have impact.”

Moldoveanu, M., & Leclerc, O. (2015). The design of insight: How to solve any business problem. Stanford University Press.

An integrated framework for identifying, understanding, and leveraging company behavioral patterns to achieve desired outcomes

Rooted in academic psychology (system theory)

Predictive insights in no time (2-3x faster than traditional approaches, foresight up to 4-6 months in advance)

Works with pre-existing qualitative data (no further data collection required)

FINANCE WITHOUT NUMBERS SCENARIO EXAMPLES

Finance Without Numbers enables a precise understanding of **BRAND PERSONALITY**, customer commitments, reputation risks, and their direct connection to **STRATEGIC GOALS**

Finance Without Numbers can assess a company's **CORPORATE CULTURE**
(a rather outdated term, by the way)

Finance Without Numbers can be used to build a **WORLD-CLASS COMPANY KNOWLEDGE BASE**
(a vital component for innovation)

Finance Without Numbers can assess & improve a company's **INNOVATION CAPABILITY**

Finance Without Numbers can be used to create innovative & effective **SUPPLIER DUE DILIGENCE** approaches

Finance Without Numbers can be used for **COMPETITOR BENCHMARKING**

Finance Without Numbers offers new insights into **ETHICS, DIVERSITY, REPUTATION and CORRUPTION**

Finance Without Numbers can distill a company's **NARRATIVE, STRENGTHS, RISKS, AND CHALLENGES** from its annual report and other data sources

Finance Without Numbers can meta-analyze the issues identified by the 2nd & 3rd **LOD***

Finance Without Numbers can assess the level of **TRUST** within a company

Finance Without Numbers can dissect a **STRATEGY** into its behavioral components

Finance Without Numbers can be used to **CHALLENGE FRAMEWORKS** such as those based on CSR legislation, **SAFE 6.0** or **COSO**

Finance Without Numbers can identify **one-sided company thinking preferences**
(if left unmanaged, they always pose a risk)

* Line of Defense, i.e., Risk, Compliance, Legal, Internal Audit
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PREDICTIVE DATA-DRIVEN INSIGHTS AT YOUR FINGERTIPS

INTRODUCTORY SESSION

A free 30-minute session to get to know each other and discover how I can help you



TAILORED SERVICES: CONSULTING, PROJECTS, ASSESSMENTS

Management consulting, project collaborations, and on-site assessments, designed for your unique needs



ONBOARDING SESSION: EXPLORING MUTUAL FIT & DELIVERABLES

A focused two-hour paid session to explore your objectives, aspirations, and challenges. Together, we will discuss how my know-how can help you reach your goals faster and smarter.



PICK MY BRAIN

Have a specific question? Schedule a paid call, priced by 15-minute slots, for personalized advice.



QUALITATIVE DATA ANALYSIS

Have a data set and need qualitative data analysis? Schedule a paid call for personalized advice and a price quote.

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