



Get the People Right. Get the Culture Right.

Maximize individual and team potential through building better culture and developing better people.



Principles Founder



Ray Dalio
FOUNDER

Ray is one of the world's most successful investors and entrepreneurs. He designed and developed management practices and software tools inside his company, **Bridgewater Associates**, featured in his best-selling book, *Principles*.



Ray's Mission

- Surface the best ideas
- Understand what people are like
- Real-time direct feedback informing opportunities for growth/looping
- Placing people in the right roles and building stronger teams

To build an idea meritocracy with meaningful work and meaningful relationships, through truth and transparency

**WHAT YOU AND THOSE YOU
WORK WITH ARE LIKE**

+

**HOW YOU ARE WITH
EACH OTHER**

=

**YOUR
SUCCESS**



Our Solution

Our **platform** provides **evidence-based insight** into the key areas that actually drive improvement in effectiveness and well-being in individuals and teams to give them an **actionable roadmap** for **continuous improvement**.

Companies that cultivate a deliberately developmental culture **drive profitability and maximize shareholder value**

CULTURE

72%

of executives agreed that corporate culture impacts financial performance, but only **46%** hold themselves and their teams accountable for the culture.¹

PERSONALITY / TEAMS

94%

of employees are more likely to remain with a company that invests in their development, saving companies the **2x** salary it costs to replace them.²

FEEDBACK

8.9%

Organizations where managers received feedback on their strengths showed **higher profitability by 8.9%**.³

¹ Heidrick & Struggles: CEOs are Leading with Culture to Boost Employee Engagement and Bottom Line, Reveals New Data from Heidrick & Struggles, 2023

² Harvard Business Review, Effective Employee Development Starts with Managers, 2022

³ Gallup, The Secret of Higher Performance, 2011

Companies using Principles Tools and programs experience significant improvements in culture, self- awareness, development, and engagement.

76% of employees are more comfortable sharing their perspectives openly

80% of people received more feedback they feel is useful to their personal and professional growth

47% increase in employees feeling involved in decision-making that has an impact on their work, their team's work, or the organization at large

36% increase in clear understanding of personal strengths and growth areas

77% of people reported having a deeper understanding of others' perspectives to enhance team alignment than prior to the program

Principles Tools



Principles Culture Assessment

| Scientifically-backed culture assessment framework¹ to evaluate organizational culture, providing predictive data and actionable insights that enhance employee engagement and performance.

| KPI: Explains ~50% of the variance in all employee job satisfaction

PrinciplesUs

| Best-in-class personality assessment for teams combines cutting-edge personality science and team insights to scale employee development.

| Developed by Ray Dalio with Adam Grant and Brian Little.

| KPI: Over 2m participants and more than 1000 companies engaged. Rated 4.9/5, ~90% of participants say "valuable in understanding self- and others"

¹The "5Cs" culture assessment framework measures the five factors of organizational culture and team cohesion: Connection, Candid Communication, Clarity, Collaboration, and Contribution.

Principles: **By The Numbers**

Since our founding in 2020, Principles products have made significant impact on those who have engaged with them. Embracing our mission of enabling measurable development, individuals and organizations worldwide have utilized Principles tools



Over 2.5 mil

PrinciplesYou Participants

800+

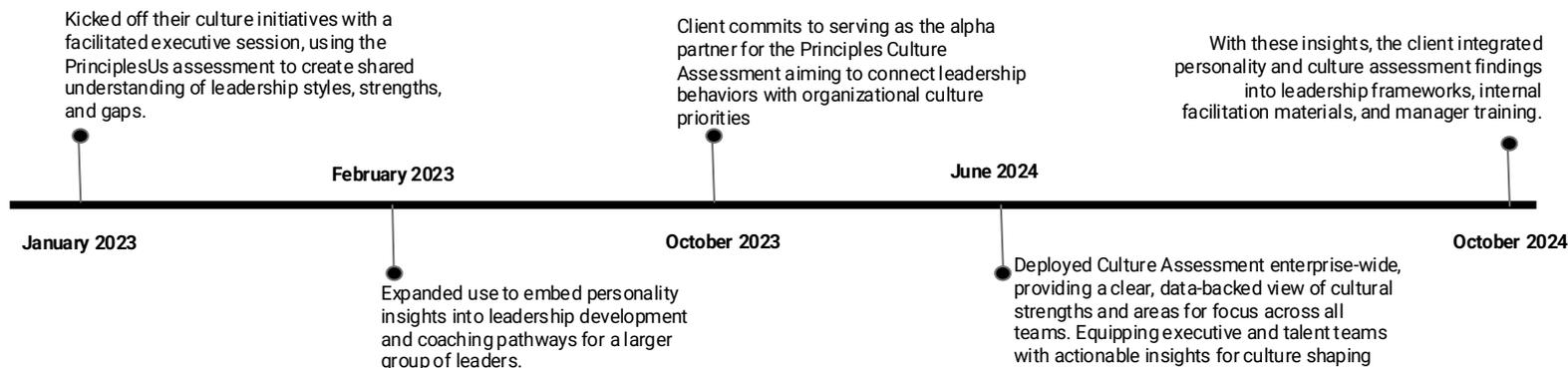
Companies Have Utilized PrinciplesUs

50,000+

5Cs Culture Survey Participants

Case Study | Fortune 25 Company

Fortune 25 Company partnered with Principles to transform culture and people development into a cornerstone of their business strategy, ensuring sustained success and future growth.



Solution

- Embedded PrinciplesUs personality insights within the client leadership population, embedding data-driven insights into leadership onboarding, training, and development.
- Partnered to develop and deploy the Principled Culture Assessment across 70,000 employees to measure organizational culture.

Results

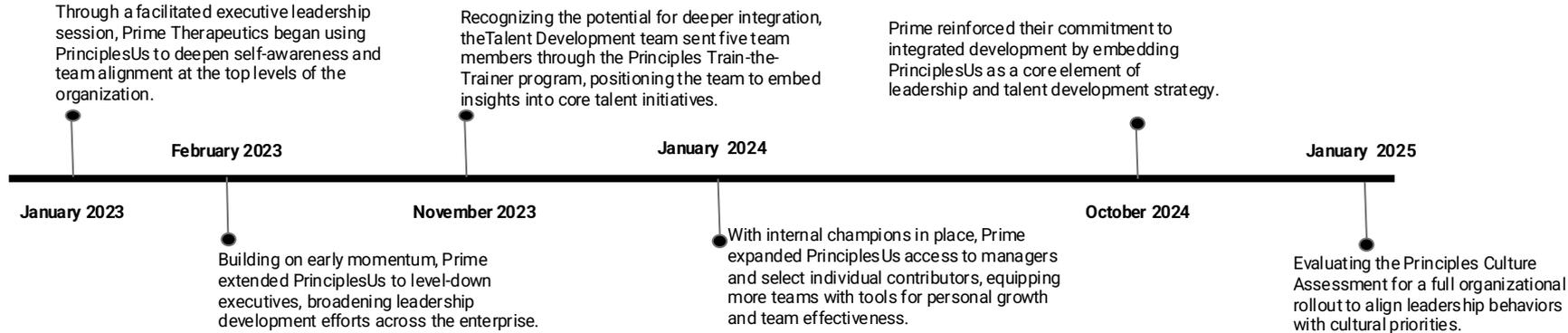
- Successfully launched the Principled Culture Assessment to the entire employee population achieving a 74% participation rate across the enterprise, exceeding board-level targets.
- Delivered actionable insights and prioritized key cultural shifts, enabling measurable progress in leadership and culture initiatives.
- Strengthened engagement through key programs such as Executive Onboarding workshops and other development sessions.

Future

- A culture reassessment planned for 2025 to track sustained impact and refine the culture roadmap.
- Recognizing and building on the momentum, the client renewed and expanded their partnership, scaling assessments, workshops, and enablement to embed cultural values into leadership behaviors and team practices across the organization.

Case Study | Prime Therapeutics

Prime Therapeutics partnered with Principles to enhance development, foster team collaboration, and embed a culture of continuous learning and growth across the organization.



Solution	Results	Future
<ul style="list-style-type: none"> Introduced PrinciplesUs for leadership development at the highest levels of the organization. Expanded use across the organization after recognizing the value, incorporating the tool into team workshops and culture initiatives. Trained 5 internal resources to scale the tool company-wide, embedding it into programs like onboarding and team development. Collaborated over several months to integrate the assessment into team workshops and identify additional anchor points for impact. 	<ul style="list-style-type: none"> Deployed to over 2,000 users (and growing) with exceptional feedback and measurable team improvements. Enabled deeper team connections by fostering a shared language and enhancing collaboration. Achieved accelerated progress: One department leader reported making “multiple years of progress” in a single facilitated session with 110 participants. 	<ul style="list-style-type: none"> Expand the assessment to additional users while driving continuous learning and engagement among existing participants. Strategically integrate and market the tool into broader organizational processes to deepen its impact. Evaluating the Principled Culture Assessment for the entire organization.

Case Study | US Armed Forces

Small US Armed Forces team partnered with Principles to foster a culture of candid feedback and collaboration at all levels, driving systemic improvements in mission critical operations.

Solution

- Partnered with US Armed Forces to define and operationalize their values, fostering a culture of candid feedback and collaboration within a high-stakes, fast-paced environment.
- Deployed 120 licenses of PrinciplesUs and the Dot Collector, along with a train-the-trainer program certifying three psychologists to facilitate and integrate these tools effectively.
- Collaborated with US Armed Forces leadership to customize the Dot Collector ontology, aligning key attributes with their unique organizational values.
- Integrated tools and practices into their operational workflows, including:
 - Weekly leadership and special ops team syncs to debrief missions (“Hot Washes”).
 - 1:1 meetings between officers-in-charge (OIC) and their direct reports to foster open dialogue.
 - Recognizing and actioning feedback patterns to identify areas for improvement and prioritize focus areas.

Results

- Successfully created a culture of openness and transparency centered on feedback, enabling US Armed Forces teams to:
 - Engage in candid feedback that improved communication flow at all levels.
 - Conduct more effective debriefs, identifying real issues and implementing actionable improvements.
 - Leverage shared values to align teams and enhance collaboration, even in classified environments where the tools were restricted.
- Embedded operating standards for feedback collection and action planning, driving systemic cultural change in a traditionally hierarchical military structure.
- Achieved significant operational impact, with US Armed Forces leadership noting the tools’ contributions to mission-critical outcomes.

"I want to share, without getting into the detail, that some of the work we were able to do together with this tool actually impacted national security."

Major [redacted] / [redacted] Commander

Word-class Brands Utilizing Our Products





In the last year, we have had the opportunity to share this assessment with over 1,000 users across Prime with resounding success! Not only have we received wonderful feedback about our users' experience, but we have seen the impact it has had on teams across the enterprise. The Principles Us tool has provided a way to connect teams on a deeper level, bringing awareness to how they can work better together to leverage their collective strengths and providing a common language to talk about similarities and differences in their personalities. In addition, this tool provides meaningful, user-friendly, and interactive ways for teams to continue discussions long after a facilitated session – something uniquely valuable about this tool compared to others we have used. One executive leader who brought this tool to 110 individuals at an onsite shared that it felt like the department made multiple years of progress towards working better together in just the day we spent together!

Though the tool itself already has a ton of resources within, the PrinciplesUs team has also been fantastic partners in ensuring our success. It feels like they truly care about us not just liking the tool, and that they will go above and beyond to offer their support and insights to ensure we have what we can get the most out of it. As we look to the future, we hope to not only expand to more users, but strategically engage those who have already gone through the assessment to encourage continuous learning and exploration.

*Hannah Peterson
Talent Development & Learning
Prime Therapeutics*



Testimonial

PRIME THERAPEUTICS

Prime Therapeutics is a leading pharmacy benefit management (PBM) company that collaborates with health plans, employers, and government programs to deliver innovative pharmacy solutions.

With over 7,000 employees, Prime emphasizes transparency, innovation, and total drug management to meet the evolving needs of the healthcare industry.

January 2023 became a customer

What Our Clients Say About Principles



salesforce

“

Eye-opening for self-discovery, team dynamics, and ideas for management approaches

Senior Director of Strategy, Salesforce



THRIVE
GLOBAL

“

The assessment has been a game-changer at Thrive. Everybody at Thrive has taken the assessment.

Arianna Huffington, CEO and Founder Thrive Global



Principles

Appendix Materials to Follow