

## WEEKLY PROGRESS REVIEW (WPR)

The purpose of the Weekly Progress Review (**WPR**) is to engage key stakeholders in the process of improving the business. We will agree on the prioritization and scale of core issues, and the opportunities identified and realized. Finally, we will summarize this week's activities, findings, the tools built, and the changes implemented. We will discuss the training conducted, measure our results, and review the direction for next week.

The **WPR** builds on the Consulting Services Agreement and Project Plan between Cogent Analytics and Dunning Industries. This report covers the period from 2025-11-17 to 2025-11-21.

### Executive Summary:

Cardinal Transportation is executing four integrated strategic initiatives designed to transform organizational capability and drive enterprise value. This performance-based compensation model awards \$36,650 in annual manager bonuses to generate \$3.86M to \$5.82M in net annual recurring benefit—a 53.6x to 80.4x return.

**Cultural Stewardship (Dennis Bennett):** Dennis has completed the foundational framework embedding accountability and dependable follow-up as organizational expectations. The Cardinal Cash recognition system, physical and digital submission infrastructure, and manager rotation structure are finalized. Deployment begins Q1 2026. This initiative generates \$332K-\$665K annually, delivering a 17.0x to 34.1x return on Dennis's \$9,763 annual bonus. Dennis will lead Buckeye employee onboarding post-acquisition, going on-site to sign employees as Cardinal employees and remaining available throughout the 60-day due diligence period.

**Corporate Outreach & Brand (Maureen Robins):** Maureen has completed strategic architecture for Cardinal's first coordinated external market positioning program. Outreach calendar, corporate targeting strategy, digital market defense approach, and CRM integration requirements are finalized. Pending Cogent Analytics proposal, 2026 budget finalization will be complete. This initiative generates \$1.375M-\$1.8M annually, delivering a 76.4x to 100.0x return on Maureen's \$9,000 annual bonus.

**The Cardinal Way Training (Jessica Jenkins):** Jessica has established a comprehensive 12-month training curriculum. The second-floor training center concept is approved with Maureen relocating her office upstairs. Renovation and deployment scheduled for Q1 2026. This initiative generates \$1.5M-\$2.4M annually, delivering a 71.1x to 113.7x return on Jessica's \$10,555 annual bonus.

**CSR/Outbound Sales (Kim LeCuyer):** Kim has completed the strategic architecture for Cardinal's first systematic outbound sales program. Client classification and training launch Q1 2026. This initiative generates \$725K-\$1.025M annually, delivering a 49.4x to 69.9x return on Kim's \$7,332 annual bonus.

**Buckeye Acquisition Status:** Bill and Jerry are prepared to move forward with the deal as proposed by Steve Dobb. Matthew Huffman, Buckeye's legal counsel, will review final documents in the coming days. Roy has prepared the Multi-Location Operations Manager job description; Cogent will begin the search once approved.

**Combined Impact:** These four initiatives create \$3.93M to \$5.89M in annual recurring value, enabling Cardinal to fund strategic growth and the Buckeye acquisition while maintaining operational excellence.

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## Focus – Cultural Stewardship

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### Status:

The Cultural Stewardship Initiative has progressed significantly, with Dennis establishing the foundational framework that will embed accountability and dependable follow-up as organizational expectations. Dennis has completed the design of six cultural focus areas and established the manager assignment structure where each leader (Dennis, Maureen, Dereck, Jess, James, and Kim) will own one focus area throughout the year, rotating every two months to ensure comprehensive organizational coverage and buy-in across all levels of management.

The recognition and incentive infrastructure is finalized. The Cardinal Cash system has been designed to reward acts of cultural stewardship with \$5 per legitimate submission, creating immediate recognition and tangible value for employees who demonstrate cultural alignment. Monthly drawings will provide additional prizes including gift cards and PTO, ensuring sustained engagement and motivation. Two physical submission boxes—one in the front of house and one in back of house—will collect employee recognition submissions, with a complementary digital online portal allowing submissions and real-time tracking of cultural stewardship acts.

Survey instruments are being finalized to measure cultural baseline at the beginning of 2026 and track improvement through year-end assessment. Physical collateral including signage, manager desk plaques, t-shirts, and other recognition materials are in design stage and will be ready for deployment. The annual company-wide cultural event has been conceptually approved and will serve as a major engagement touchpoint. The calendar of monthly topics, events, and activities is being developed, with each assigned manager responsible for delivering three specific outcomes: written collateral, a team activity, and pre/post engagement surveys to measure impact.

Supporting infrastructure—the tracking and reporting system for survey responses and documented acts of stewardship—is being specified. Manager desk cards identifying each person's cultural focus area and two-month rotation schedule are pending finalization. Recognition budget and approval process documentation must be completed before full system deployment in Q1 2026. By November 1st, 2026, Dennis will have prepared the complete 2027 budget and plan with refined performance goals based on first-year learnings.

## Focus – Cultural Stewardship

### Impact:

The Cultural Stewardship Initiative will generate \$332,000 to \$665,000 in annual recurring performance improvement by directly addressing the accountability gap that has plagued operational execution and created rework cycles throughout the organization. Dennis's 15% performance bonus of \$9,763.17 annually will be awarded upon 100% completion of all initiative deliverables, creating clear alignment between his execution excellence and Cardinal's financial benefit.

When analyzed over the 24-month performance period, the compensation investment tells a compelling story about organizational ROI. Dennis's annual salary of \$65,087.80, combined with his annual bonus of \$9,763.17, totals \$149,701.94 over two years. Against this investment, the initiative will generate \$332,000 to \$665,000 annually in performance improvement through two distinct mechanisms.

The first improvement vector—a 2% productivity lift via dependable follow-up—generates \$280,000 to \$560,000 annually. This is not aspirational improvement. This represents real cash value created when team members can rely on commitments being honored, when communication loops close predictably, and when rework cycles diminish because coordination is reliable. The second vector—a 1% SGA reduction from fewer rework cycles—generates \$52,000 to \$105,000 annually by eliminating duplicated effort, clarification requests, and operational friction that currently consumes management attention and administrative overhead.

#### Dennis Bennett - 24-Month ROI Analysis:

Impact Component	Conservative	Optimistic
2% productivity lift via dependable follow-up	\$280,000	\$560,000
1% SGA reduction from fewer rework cycles	\$52,000	\$105,000
Annual ROI	\$332,000	\$665,000
24-Month Bonus Investment	(\$19,526)	(\$19,526)
Net Annual Benefit	\$312,474	\$645,474
ROI Multiple	17.0x	34.1x

These improvements are recurring. They don't depend on external market conditions, new client acquisitions, or operational luck. They flow directly from internal discipline, and they compound year after year as long as the cultural systems remain in place. The strategic value extends beyond the immediate financial return. These improvements strengthen enterprise value by demonstrating to lenders and potential acquirers that Cardinal operates with operational discipline and reliable execution. The cultural foundation that Dennis is building becomes the platform upon which Maureen's revenue growth, Jessica's training excellence, and Kim's sales activation can flourish. Without this cultural bedrock, the other three initiatives would face constant friction and incomplete execution.

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**FOCUS – Corporate Outreach, Community & Brand Initiative**

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**Status:**

Maureen has completed the strategic architecture for Cardinal's first coordinated external market positioning and brand development program. The outreach calendar framework is designed and ready for deployment, specifying 2-3 social media activities per week as the baseline engagement cadence. The corporate targeting strategy has been developed to systematically reach 8-10 new corporate contacts per quarter, moving Cardinal from passive inbound demand response to active market development.

CRM integration requirements have been documented to ensure all outreach activities, partnership actions, and business development leads flow through Zoho for tracking, follow-up management, and ROI reporting. Event post-mortem protocols have been established to capture learnings after every major community or corporate event, documenting what worked, what didn't, lead value generated, and identifying improvements for next execution cycle.

The Digital Market Defense strategy has been developed in direct response to Cogent's business development research findings. Competitors are actively purchasing Cardinal's brand search terms and dominating high-intent search results, effectively stealing market share through digital displacement. Maureen's strategy will work with Cogent Analytics to reclaim these brand terms, restore Cardinal's digital visibility, and protect the revenue streams that should flow from high-intent customer searches.

Brand positioning, social media engagement framework, and media relations protocols have all been finalized and are ready for immediate deployment once the final budget is confirmed. Maureen is currently awaiting the final proposal from Eric Briggs at Cogent Analytics for the social media and content management services component. Once this quote is received and integrated into the overall budget, 2026 budget finalization can be completed. The baseline metrics approach is strategically appropriate for 2026 since this role has never existed at Cardinal before. Success will be measured on completion of outreach activities, consistent social media posting, corporate contact establishment, event post-mortem documentation, and deployment of the digital market defense strategy.

## FOCUS – Corporate Outreach, Community & Brand Initiative

### Impact:

The Business Development & Brand Initiative will generate \$1,375,000 to \$1,800,000 in annual recurring revenue by positioning Cardinal as a proactive market participant rather than a reactive demand responder. Maureen's 15% performance bonus of \$9,000.00 annually will be awarded upon 100% completion of all initiative deliverables, aligning her compensation with enterprise value creation.

When evaluated over the 24-month performance period, Maureen's compensation investment of \$138,000 generates extraordinary organizational returns. Her annual salary of \$60,000 plus annual bonus of \$9,000 totals \$138,000 over two years. Against this relatively modest investment, the initiative generates \$1,375,000 to \$1,800,000 annually through four distinct revenue and efficiency improvement vectors.

Maureen Robins - 24-Month ROI Analysis:

Impact Component	Conservative	Optimistic
Brand and Digital Presence (2% revenue impact)	\$200,000	\$280,000
Corporate and Institutional Growth (4-6% volume)	\$700,000	\$900,000
Community and Reputation Development (3% visibility)	\$300,000	\$375,000
Operational Coordination Efficiency (1.5%)	\$175,000	\$225,000
Annual ROI	\$1,375,000	\$1,800,000
24-Month Bonus Investment	(\$18,000)	(\$18,000)

Brand and Digital Presence improvement captures additional annual business volume through enhanced digital visibility, reduces loss of potential clients to competitor advertising, and improves inbound lead conversion through consistent messaging and market presence. Corporate and Institutional Growth comes from structured outbound communication, improved account management processes, re-engagement of existing corporate partners with systematic touchpoints, expansion of corporate contracts through professional relationship management, and formalization of communication with new large-scale accounts. Community and Reputation Development generates revenue through 3% visibility-to-conversion impact from consistent participation in community partnerships, targeted visibility within the Columbus market, and refined media engagement that drives higher referral and awareness-based bookings. Operational Coordination and Efficiency comes from better coordination across marketing and communication channels, fewer redundancies in business development activities, and faster follow-up with potential clients.

By repositioning Maureen from CSR Manager—where she created the "single largest complaint regarding communication barriers" at Cardinal by requiring all inter-departmental communication to flow exclusively through her—to external brand and community development, Cardinal simultaneously removes a major organizational bottleneck while activating a revenue generation engine. The net annual benefit of \$1.357M to \$1.782M nearly equals the entire acquisition price of Buckeye Charters, demonstrating that organic improvement can fund strategic growth and capital deployment.

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## Focus – The Cardinal Way Training Initiative

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### Status:

Jessica has established a comprehensive 12-month training curriculum that transforms Cardinal from reactive driver compliance to proactive driver development and excellence. The curriculum structure addresses critical capability areas: hands-free driving, DVIRs with pre-trip and post-trip inspection protocols, Samsara top alerts and fleet technology utilization, mechanical troubleshooting for drivers, defensive driving techniques, customer service and Cardinal brand consistency, National Drug Registry compliance, licensing and certification requirements, accident reporting protocols, HR training and employment policies, Fit for Duty assessments, and quarterly drivers town halls for communication and feedback.

Jessica has documented a complete onboarding process for new drivers that will integrate Fit for Duty assessment protocols and potentially include third-party Class B training from a best-in-class provider while ensuring Cardinal-delivered content through The Cardinal Way curriculum maintains consistent brand messaging and cultural alignment. The Fit for Duty assessment protocol has been established, with Jessica currently evaluating Concentra or alternative providers to determine the best program that aligns with Cardinal's standards and operational requirements.

The second-floor training space concept has been approved, with Maureen committing to relocate her office upstairs to create a training center that becomes a required touchpoint for drivers for each trip. This physical investment transforms training from a periodic compliance event into an integrated part of driver workflow, elevating the cultural importance of driver development and creating daily engagement with training and safety resources. The training space budget is being prepared, including design specifications, equipment requirements, renovation costs, and technology infrastructure.

Third-party training partner selection and contracting are underway to identify the best provider for Class B training delivery. Monthly training materials and resources are being developed to support the 12-month rotation. Training space renovation and setup is scheduled for completion in Q1 2026, with training materials and resources deployment, trainer alignment and certification, and launch of the systematic monthly training rotation all planned for 2026 execution.

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## Focus – The Cardinal Way Training Initiative

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### Impact:

The Cardinal Way Training Initiative will generate \$1,500,000 to \$2,400,000 in annual recurring operational and revenue improvement by systematically developing driver excellence, reducing incidents, improving customer experience, and building driver retention. Jessica's 15% performance bonus of \$10,554.96 annually will be awarded upon 100% completion of all initiative deliverables, creating direct alignment between her execution and organizational value creation.

When analyzed over the 24-month performance period, Jessica's compensation investment of \$161,842.72—consisting of \$70,366.40 annual salary plus \$10,554.96 annual bonus—generates exceptional organizational returns. Against this investment, the initiative produces \$1,500,000 to \$2,400,000 in annual recurring improvement through three primary mechanisms.

Jessica Jenkins - 24-Month ROI Analysis:

Impact Component	Conservative	Optimistic
Accident reduction (15-25% decrease)	\$180,000	\$300,000
Enhanced customer service retention (8-12%)	\$1,200,000	\$1,800,000
Reduced driver turnover (20-30% reduction)	\$200,000	\$400,000
Annual ROI	\$1,500,000	\$2,400,000
24-Month Bonus Investment	(\$21,110)	(\$21,110)
Net Annual Benefit	\$1,478,890	\$2,378,890

Accident reduction generates \$180,000 to \$300,000 annually from 15% to 25% decrease in accident frequency through proactive training, which reduces insurance costs, vehicle downtime, liability exposure, and mechanical breakdowns through improved driver troubleshooting capability. Enhanced customer service retention produces \$1,200,000 to \$1,800,000 annually from 8% to 12% improvement in client retention as drivers deliver consistent brand representation, professional service, and superior customer experience that increases repeat bookings and enables premium pricing. Reduced driver turnover contributes \$200,000 to \$400,000 annually from 20% to 30% reduction in driver turnover as The Cardinal Way creates a professional development pathway, improves employee experience, and establishes Cardinal as an employer of choice in the competitive transportation labor market.

The strategic importance of this initiative extends far beyond immediate financial metrics. The Cardinal Way establishes Cardinal as a learning organization that continuously improves performance through systematic development. The training framework creates replicable systems for maintaining organizational standards across geographic and operational diversity—absolutely critical as Cardinal pursues the Buckeye acquisition and multi-location expansion. The second-floor training center serves as both functional workspace and cultural statement, physically manifesting Cardinal's commitment to driver excellence and supporting premium market positioning.



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## *Focus – CSR/Outbound Sales Initiative*

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### Status:

Kim has completed the strategic architecture for Cardinal's first systematic outbound sales program and CSR capacity optimization initiative. The Business Development Plan is fully documented with detailed quarterly roadmap, moving Cardinal from reliance on inbound demand to proactive, scalable sales operation. The client tiering system has been designed using the Amber, Indigo, and Scarlet classification framework—color names drawn from the Cardinal brand palette that enable strategic prioritization without risking reputational impact if labels are ever mentioned externally.

The CSR team structure and role assignments are established with Victoria, Antonette, Karen, CSR 4, and CSR 5 designated as the core outbound sales and relationship management team. Success measures and KPI framework have been defined with clear expectations for outreach volume, customer retention, repeat business, partnership expansion, and CRM system utilization. Zoho CRM process requirements have been documented to ensure 100% of leads are logged, 100% of follow-up tasks are completed, and weekly reporting is submitted consistently.

Outreach templates and communication standards have been developed to enable consistent, professional engagement across all CSR outreach activities. Training curriculum has been outlined covering Zoho refreshers, sales methodology, and outreach techniques. Weekly and monthly reporting structure has been established to track activity, conversion, and results. Client classification into Amber, Indigo, and Scarlet tiers is currently being executed, with 100% classification scheduled by end of Q1 2026.

Zoho CRM process implementation and CSR training are underway. Lead lists are being built across all service segments. Outbound campaigns are being prepared for launch. CSR team accountability systems are being deployed. Systematic outbound campaigns launch is planned for Q1 2026. Baseline metrics for quarterly target-setting in Q2 are scheduled. Initial Zoho and sales training for all CSRs is planned. Weekly review meetings and individual check-ins will be deployed to maintain accountability and coaching. Q2 2026 goals include setting formal Sales KPI targets based on Q1 baseline data, achieving 5 outbound touches per week per agent for new targets, maintaining 90% weekly follow-up rate per agent for existing clients, and establishing 8-10 new corporate contacts per quarter.



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**Focus – CSR/Outbound Sales Initiative**

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**Impact:**

The CSR/Outbound Sales Initiative will generate \$725,000 to \$1,025,000 in annual recurring revenue by creating Cardinal's first proactive sales capability and optimizing CSR team capacity. Kim's 15% performance bonus of \$7,332.00 annually will be awarded upon 100% completion of all initiative deliverables, aligning her compensation with sales excellence and business development success.

When evaluated over the 24-month performance period, Kim's compensation investment of \$112,424—consisting of \$48,880 annual salary plus \$7,332 annual bonus—generates substantial organizational returns. Against this investment, the initiative produces \$725,000 to \$1,025,000 in annual recurring revenue through three integrated mechanisms.

Kimberly LeCuyer - 24-Month ROI Analysis:

Impact Component	Conservative	Optimistic
Outbound sales activation	\$450,000	\$650,000
CSR productivity gains	\$200,000	\$275,000
Communication efficiency	\$75,000	\$100,000
Annual ROI	\$725,000	\$1,025,000
24-Month Bonus Investment	(\$14,664)	(\$14,664)
Net Annual Benefit	\$710,336	\$1,010,336

Outbound sales activation generates \$450,000 to \$650,000 annually from systematic outbound calling that reaches previously untapped market segments, re-engagement campaigns that recover revenue from dormant accounts, and targeted campaigns for weddings, corporate events, and hospitality partnerships that convert qualified leads to booked revenue. CSR productivity gains contribute \$200,000 to \$275,000 annually from removal of previous communication bottlenecks that freed CSR-to-operations coordination, client tiering that ensures appropriate service levels for high-value accounts, systematic relationship management that increases account penetration, and CRM-driven processes that reduce duplicated effort and capture missed opportunities. Communication efficiency adds \$75,000 to \$100,000 annually from elimination of restrictive protocols that previously blocked inter-departmental communication, direct coordination between CSRs, supervisors, and drivers that eliminates delays, activation of dormant CRM tools and business development systems, and standardized processes that reduce coordination time and errors.

The initiative transforms Cardinal from passive demand-response to active market development—a fundamental competitive repositioning that supports premium pricing, account expansion, and sustainable growth independent of market fluctuations. The 2026 baseline year approach allows Cardinal to establish realistic performance benchmarks while building organizational capability, with performance acceleration expected in 2027 and beyond as systems mature and CSR team proficiency increases.

## Buckeye Update

Bill and Jerry are prepared to move forward with the deal as proposed by Steve Dobb.

Matthew Huffman, Buckeye's legal counsel, will be reviewing the final documents and providing them to Bill and Jarry in the coming days.

I provided the following timeline to Bill for Buckeye employee engagement and assessment.

### Employee Engagement Timeline: 60-Day Due Diligence Window

#### First 30 (thirty) Days:

##### Day 1

- Bill and Jerry inform employees about the acquisition.
- Bill reports feedback and employee reactions to Elliott.
- Bill provides all drivers' CDL license numbers.

##### Day 7

- Elliott sends online surveys to Bill.
- Bill instructs employees to complete the required survey (15-20 questions), emphasizing it takes little time and should be completed within 48 hours.

##### Day 8

- Optional: Offer employees the chance to schedule an onsite Q&A with Elliott or a Cardinal representative.

##### Day 10

- Elliott/Cardinal conducts on-site Employee Insight Sessions (20–45 mins each) with Charlotte and Riley.
- Elliott/Cardinal conducts on-site Employee Insight Sessions (20–45 mins each) with Mechanics/Garage team.

##### Day 11

- Complete any remaining Employee Insight Sessions.

##### Days 20 & 21

- Elliott/Cardinal offers open hours onsite (Dayton) for drivers to ask questions or get information.

##### Day 30

- Send second, shorter survey to employees, focusing on reassessing temperature and intentions.

Roy has the job description for the Multi-Location Operations Manager, once approved, we will engage Shane with Cogent to start the search.

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**LOOKING FORWARD: Next Lifecycle Visit Weeks of December 8th**

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**Buckeye Acquisition:**

- Follow and Implement the Employee Engagement Timeline
- Provide ongoing support as needed
- Finalize integration plan

**Financial Tools:**

- Updated version of Budget

**HR:**

- Speak with Steve Shaffer about his desire to move to front desk role

**Cardinal Valuation:**

- Formally engage Erin Hollis to provide valuation of Cardinal

**Corporate Development and Marketing:**

- Send Maureen Eric Brigg's finalized proposal

Examined and approved by:

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Elliott J. Culp  
Project Director  
Cogent Analytics

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Roy Alonso  
President/Owner  
Cardinal Transportation