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 Cardinal Transportation. This report covers the period from 2025-06-09 to 2025-06-13.

Executive Summary:

Over four days, Cardinal Transportation Ltd. delivered intensive leadership training centered on **"why" style questioning** to uncover root causes and true effects of workplace issues. This approach enabled participants to move beyond surface-level symptoms, using brief, plain language and focusing on how issues impact the team and company—not just individual emotions.

A central lesson was that **emotional first responses** often lead to preconceived notions about people, interactions, and outcomes. By recognizing and managing these reactions, participants learned to approach problems more objectively and collaboratively, rather than allowing personal feelings to cloud judgment.

Guided by Voltaire's insight that **"a man can be measured by his questions,"** employees practiced crafting concise, purposeful questions and closing the communication loop through structured follow-up and clear accountability. These tools and skills worked together, allowing participants to systematically identify issues, communicate them effectively, and ensure resolution with clear next steps.

Throughout the sessions, participants made significant progress. Many who initially struggled with these concepts later reported applying new skills in real workplace situations, expressing gratitude for the training and a new perspective on problem-solving. Several noted that these four days sparked the **most internal dialogue in company history about a single event** among those who participated.

Cardinal's investment in these methods has already begun to shift the culture toward greater clarity, accountability, and continuous improvement—demonstrating the value of asking the right questions, following through, and, as we adopted what Voltaire said, we now say "a manager can be measured by their questions."

Cogent Analytics

Focus – *Leadership Training* | *Pillar* – *People* | *Deliverable* – *Interpersonal Skills*

Reasoning:

The decision to begin our leadership development journey with a focus on **Interpersonal Skills** is rooted in organizational need and the foundational role these skills play in effective leadership. With recent changes and evolving team structures, the ability to understand, empathize, and communicate is more critical than ever. We prioritized establishing a shared baseline for how people think and interact, as leadership is fundamentally a **people-driven discipline**.

Feedback from prior initiatives and operational challenges—such as communication breakdowns, change resistance, and unclear authority—highlighted a gap in **emotional and psychological understanding** among leaders. Issues like employees bypassing supervisors, confusion over DVIR report incentives, and unclear authority structures underscored the need for a deeper grasp of what drives behavior and engagement within teams.

We framed the first two days of training around the principle that **human beings respond emotionally before logically**, challenging the misconception that decisions are primarily rational. By surfacing this early, we aimed to help leaders recognize and manage the emotional undercurrents that influence team dynamics, engagement, and resistance.

Using Leadership Overview and the Interpersonal Skills deck, we introduced the five foundational elements: Power, Ego, Emotional Intelligence, Core Values, and Social Styles. The distinction between types of power—Legitimate, Expert, and Referent—was used to explain why some leaders struggle to gain true commitment, while others inadvertently foster resistance. The exploration of Ego and Emotional Intelligence was tailored to address observed challenges in feedback, performance management, and conflict resolution.

We emphasized **self-accountability** as essential for leadership growth, guiding participants to shift from blame to personal responsibility for communication and influence. By fostering **psychological safety and transparency**, and encouraging open discussion of unresolved organizational issues, we positioned interpersonal skills as a strategic lever for restoring trust, improving morale, and driving sustainable performance across the organization.
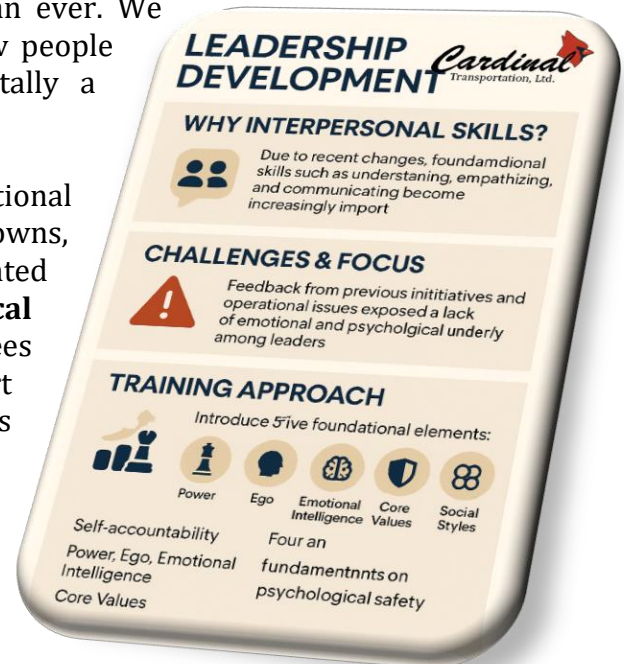
Focus – *Leadership Training* | *Pillar* – *People* | *Deliverable* – *Interpersonal Skills*

Methods:

The approach to the **Interpersonal Skills training** was intentionally structured to maximize engagement, relevance, and practical application for all participants. Over the course of two days, we delivered **distinct group sessions**, ensuring coverage across all key personnel and allowing for tailored discussion within each cohort. Each session was grounded in the Leadership Overview and the Interpersonal Skills pptx deck, providing a consistent foundation and language for all attendees.

At the outset, we set clear expectations for the training journey, emphasizing the importance of **psychological safety and open participation**. Ground rules were established collaboratively, reinforcing that all contributions would be respected and that the space was intended for honest reflection and growth. This was critical for fostering trust, especially given the recent organizational changes and the need to address sensitive topics.

A core principle introduced early was that **humans respond emotionally before logically**. This was not simply presented as theory; it was brought to life through real-world examples and facilitated group discussions. Participants examined how emotional reactions shape decision-making, communication, and workplace relationships. This led to candid conversations about how these dynamics have played out in their own teams, surfacing both challenges and opportunities for improvement.

The heart of the training involved **scenario-based exercises and roleplays**. These activities were designed to move beyond abstract concepts and into practical skill-building. Participants were asked to work through realistic scenarios, both from their own experience and from common organizational situations. The exercises focused on the **five foundational elements of interpersonal leadership: Power, Ego, Emotional Intelligence, Core Values, and Social Styles**.

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Focus – *Leadership Training* | **Pillar** – *People* | **Deliverable** – *Interpersonal Skills*

Status:

All participants successfully completed the foundational Interpersonal Skills training and demonstrated strong engagement and commitment throughout the process. While some initial resistance was observed—particularly regarding the concepts of self-accountability and the emotional basis of decision-making—ongoing facilitated dialogue, reflective exercises, and practical application led to a significant and sustained shift in understanding and mindset.

By the conclusion of the training, **all participants were able to understand, encode, and effectively remessage the core tenets and concepts** presented. This included a deep comprehension of the five foundational elements of interpersonal leadership: Power, Ego, Emotional Intelligence, Core Values, and Social Styles. Participants demonstrated their grasp of these principles by articulating them clearly in their own words, applying them thoughtfully to real workplace scenarios, and providing insightful feedback during group discussions and peer interactions.

KEY OUTCOMES

SUCCESSFUL COMPLETION AND ENGAGEMENT
All participants completed the foundational Interpersonal Skills training and showed strong engagement and commitment throughout

UNDERSTANDING OF INTERPERSONAL CONCEPTS
By the end, participants could clearly articulate and apply the five elements of interpersonal leadership: Power, Ego, Emotional Intelligence, Core Values, and Social Styles

SURFACING ORGANIZATIONAL CHALLENGES
A sense of psychologiccal safety fostered candid discussions, allowing participants to bring up concerns and connect theory to organizational realities

FOUNDATION FOR ONGOING DEVELOPMENT
The group's ability to internalize and apply concepts lays the groundwork for further leadership and cultural growth

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Additionally, the training environment fostered a growing sense of psychological safety and trust, which encouraged participants to openly surface organizational challenges and concerns. This candid dialogue not only validated participant experiences but also enriched the learning process by connecting theory to the current realities of the organization. The willingness to discuss sensitive topics and reflect on recent changes further contributed to a culture of openness and continuous improvement.

As a result, the group's demonstrated ability to internalize, communicate, and apply these concepts indicates a solid and actionable foundation for continued leadership development and cultural transformation moving forward. The progress made during this training has positioned participants to more effectively navigate interpersonal dynamics, address challenges collaboratively, and serve as catalysts for positive change within the organization.

Focus – *Leadership Training* | **Pillar** – *People* | **Deliverable** – *Interpersonal Skills*

Impact:

Mastering interpersonal skills—including emotional intelligence, self-accountability, and the five foundational elements—has a well-established, positive effect on productivity, communication, interoffice dynamics, morale, and financial performance.

Benefits of Interpersonal Skills

including emotional intelligence, self-accountability, and five foundational elements. †ore, Foundational — Core Values, and Social Styles

Work Production & Productivity
Strong interpersonal skills lead to better coordination, and fewer misunderstandings, resulting to be productivity increasing a productivity by 2-5.

Communication
Elevated emotional intelligence improves communication clarity and 10-20% improvements

Interoffice Dynamics & Morale
A culture of accountability and strong relationships leads to a 5-10% increase in engagement scores and morale, reduces voluntary turnover

Financial Impact
Investing in interpersorsonal skills training brings lower costs and improved retention, driving in a increase in net profit margins of 11-17%.

Summary
Mastering in interpersonal skills droves taugble Improvements in productivity, communication, team dynamics, and morale translate to stronger financial performance.

Productivity & Communication:
Teams with strong interpersonal skills experience improved coordination, fewer misunderstandings, and more efficient collaboration across departments. Research shows productivity can increase by 2–5 percent, and organizations report 10–20 percent improvements in communication clarity and cross-team collaboration, leading to faster decision-making and fewer costly errors.

Morale & Dynamics:
A culture of accountability and strong interpersonal relationships increases trust, reduces turnover, and improves engagement. Engagement scores and morale typically rise 5–10 percent, resulting in a more resilient, loyal, and motivated workforce. Improved dynamics also foster psychological safety, encouraging employees to share ideas and address issues early.

Financial Impact:
- **COGS:** Can be reduced by 2–3 percent through better coordination and fewer errors.
- **SG&A:** Drops 3–5 percent with higher morale and lower turnover.
- **Net Profit:** Margins rise by 11–17 percent from combined operational gains and cost savings.

Investing in interpersonal skills yields measurable improvements in productivity, communication, team dynamics, and morale. These gains directly support stronger financial performance through increased efficiency, reduced costs, and higher net profit, validating the strategic value of this training for both operational and bottom-line success.

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Focus – *Leadership Training* | *Pillar* – *People* **Deliverable** –*Communication Loop*

Reasoning:

The decision to focus intensively on **communication** as a core leadership pillar was driven by the clear realization that Cardinal's primary operational challenges did not stem from a lack of **processes or procedures**, but from persistent breakdowns in **communication—especially around follow-up and closure of the "communication loop."** It became evident through feedback, operational review, and direct observation that issues were being identified and reported, and that initiatives were being launched; however, the way these issues were communicated, **to whom**, and **how follow-up was managed** was inconsistent and ineffective.

A recurring pattern was that concerns and problems were often reported in a **long-winded, emotionally charged manner**, frequently including excessive background or personal context. Instead of framing issues in a **concise, matter-of-fact way** that focused on the business impact, communications would quickly become personalized—e.g., "Maureen is upset about…" or "Steve is frustrated…"—which shifted the focus from the underlying operational issue to the individual's emotional state. This not only **diluted the urgency and clarity** of the message but also made it difficult for leaders to prioritize and act on the information objectively.

Additionally, there was a **lack of clarity about who should be informed, how the message should be structured, and what the expectations were for follow-up and resolution**. As a result, many issues were left unresolved, or the resolution was not communicated back to the originator, leading to frustration, disengagement, and a perception that leadership was unresponsive. This breakdown in the **communication loop** directly undermined **trust, accountability, and operational effectiveness**.

The communication learning sessions were therefore designed not just to teach the mechanics of effective communication, but to fundamentally reshape **how information is shared, escalated, and closed** within the organization. The curriculum emphasized **brevity, clarity, and emotional neutrality** in messaging, as well as the importance of **structured follow-up and documented closure**. By addressing these specific pain points, the goal was to create a culture where communication is **intentional, actionable, and reliably leads to resolution**—ensuring that every issue raised is either addressed or transparently closed, and that the organization operates with greater **cohesion, trust, and efficiency**.

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Focus – *Leadership Training* | *Pillar* – *People Deliverable* – *Communication Loop*

Methods:

The **communication learning sessions** were designed to address Cardinal's core challenges with clarity, follow-up, and closure in the communication loop. The approach was highly practical and participant-driven, ensuring every attendee engaged directly with real workplace issues.

- **Issue Identification:**
  Each participant was asked to present an *actual issue* they were facing at work. This ensured relevance and immediate applicability.
- **Message Refinement:**
  As a team, we worked to distill each issue to meet strict criteria:
  1. **Brevity**
  2. **Clear identification of the issue**
  3. **Articulation of how it affects the employee and/or the company**
  4. **Use of plain language that everyone could understand**

HANDS-ON COMMUNICATION LEARNING

ISSUE IDENTIFICATION
Participants presented an actual workplace issue

MESSAGE REFINEMEN
- Brevity
- Clear identification of the issue
- Articulation of how it affects employee and/or thhe company
- Use of plain language that everyone could understand

ROLE PLAY & REAL-WORLD PRACTICE
Appropriate contact identified for addressing issue

ACTION PLANNING
30-minute meetings scheduled with agreed follow-up steps

FULL ENGAGEMENT
Each issue reviewed and refined by all participants

- **Role Play & Real-World Practice:**
  We walked through role play scenarios, practicing how to present issues in a concise, neutral, and business-focused manner—avoiding emotional or personalized framing.

- **Escalation Mapping:**
  All participants identified who they should approach to address their specific issue. As a group, we worked until the correct contact was identified for each situation, ensuring clarity on escalation pathways and accountability.

- **Full Engagement:**
  Every participant was involved in reviewing and refining every issue, reinforcing the principles of clear, actionable, and closed-loop communication.

This methodical, hands-on approach ensured that communication skills were not just discussed, but actively practiced and embedded, directly targeting the root causes of Cardinal's communication breakdowns and building habits for clarity, accountability, and resolution.

Focus – *Leadership Training* | *Pillar* – *People* **Deliverable** –*Communication Loop*

Status:

Participants took immediate, concrete steps to apply the communication skills developed during the sessions. **Each participant scheduled a meeting with the appropriate person to address their identified issue.**

These meetings were structured to be **no longer than 30 minutes**, clearly prefaced with the meeting's purpose, and prepared by asking the other party if they needed any information in advance. **Meetings were required to start and end on time** and were only considered complete when there was an **agreed follow-up date, deliverable, action, timeline, and clearly assigned responsibilities**.

All participants committed to practicing these communication skills more than once in their daily work. They also agreed to **actively seek out teachable moments with their subordinates**, using these opportunities to introduce and discuss the communication techniques covered in training. Furthermore, every participant will be prepared to **share the results and status of the issues identified during these sessions** when the training is revisited in 4–5 weeks.

Tools and resources to close the information loop are now available to all participants, supporting their ability to follow up, document outcomes, and ensure accountability. This collective commitment and access to structured resources ensures ongoing practice, reinforcement, and measurable progress toward Cardinal's new communication standards across the organization.

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Focus – *Leadership Training* | *Pillar* – *People* **Deliverable** –*Communication Loop*

Impact:

The adoption of structured communication skills and closed-loop follow-up protocols has produced measurable, research-backed improvements in both operational and financial performance at Cardinal. This transformation directly addresses the leadership reality that **"Good people leave leaders, not companies."** (Marcus Buckingham)

Operational Impact

- **Productivity Gains:**
  Teams with strong communication and feedback practices see **2–5% increases in productivity** and **10–20% faster decision-making**, thanks to reduced misunderstandings, clearer priorities, and fewer repeated errors.
- **Employee Retention & Morale:**
  Organizations with closed communication loops experience **30–50% lower voluntary turnover**. Employees who receive timely follow-up are **47% more likely to remain** with their employer, as trust and engagement increase.
- **Alignment & Engagement:**
  Structured communication and accountability drive **up to 85% higher alignment** with organizational goals, reducing project delays and improving cross-team collaboration.

Financial Impact

- **Cost of Goods Sold (COGS):**
  Improved coordination and reduced rework can lower COGS by **2–3%** annually.
- **SG&A:**
  Enhanced morale and lower turnover can reduce SG&A expenses by **3–5%**.
- **Net Profit:**
  Combined operational gains and cost savings can increase net profit margins by **11–17%**.

Industry Validation

- According to Towers Watson, organizations with highly effective communication practices deliver **47% higher total returns to shareholders** and a **19.4% higher market premium** than competitors.
- Gallup research shows poor communication can double turnover costs, while effective communication protects against costly attrition and disengagement.
- Pearson correlation studies confirm that communication effectiveness, listening, and verbal skills have a **direct, strong relationship with productivity**.

By embedding closed-loop communication and accountability, Cardinal is positioned to achieve substantial gains in productivity, retention, and profitability. These outcomes validate the strategic investment in communication skills—not just as a "soft" benefit, but as a core driver of operational excellence and financial success. As Marcus Buckingham states, **"Good people leave leaders, not companies."** Cardinal's commitment to leadership communication is a direct response to this reality.

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LOOKING FORWARD

NEXT:

- **Training on Pricing Tool and Continued CMS/Tools Training**
  James will receive focused training on the new pricing tool to ensure proficiency and readiness for model deployment. Kelly will continue with training on the CMS and other operational tools, supporting her ongoing development and ability to manage core business processes.

- **Schedule Next Training Session Dates**
  Coordinate with Maureen to set dates for the next round of leadership and communication training sessions, ensuring continuity and reinforcement of newly adopted skills.

- **Confirm Project Expansion**
  Clarify that the scope of current initiatives—CRM structure, pricing model deployment, buy-side readiness, and financial tool transition—expand upon original engagement parameters. Secure Roy's formal approval for expanded on-site project hours to sustain execution momentum, prevent regression, and maximize return on the work already completed.

- **Business Development On-Site**
  Brian will be on site next week to advance business development workstreams, providing hands-on support and driving progress on related initiatives.

This week's progress and achievements are represented by 70 billable project hours, totaling *$23,234.39*

As outlined in the associated Invoice, 45 of those hours represent my time, Elliott J. Culp, 5 of those hours represent Harrison McClain-Rubin time, 3 hours and 20 hours represented by Cogent Accounting Department.

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