

BESPOKE TRAINING PROPOSAL

Report prepared especially for

Phoenix Analytics

on 11/28/2025



CLIENT INTAKE BESPOKE TRAINING

1) *Strategic Objective (1–2 sentences)*

Phoenix Analytics is shifting from a purely service-based model (building custom dashboards) to a scalable product model, launching a self-serve analytics platform for mid-size healthcare organizations. The Product Insights team needs to become more effective at influencing internal stakeholders and shaping product direction.

2) *Primary Pain Point*

The team routinely generates high-quality insights that fail to influence product decisions. Leadership reports that the team “does great analysis but doesn’t move the needle,” and their recommendations are frequently overridden or ignored.

3) *Role Demands (Top 3 Tasks)*

- Translate complex data into clear, persuasive product recommendations for non-technical audiences
- Collaborate cross-functionally with product, UX, and engineering teams to shape roadmap priorities
- Present insights and proposals to senior leadership in high-stakes decision meetings

4) *Culture Norm Snapshot*

- Highly analytical, perfectionistic, and risk-averse culture
- Conflict avoidance is common; disagreement tends to go underground
- Decisions are influenced most strongly by confident communicators rather than data quality
- Emotional expression is viewed as unprofessional; concise logic is valued
- Meetings are fast-paced, competitive, and dominated by a few voices

5) *Time and Delivery Constraints*

- Training must be delivered remotely via Zoom
- Maximum 90 minutes per session
- Sessions must occur biweekly due to sprint schedules
- Participants are motivated but overwhelmed; cognitive load is high
- Managers are supportive but have limited availability for reinforcement

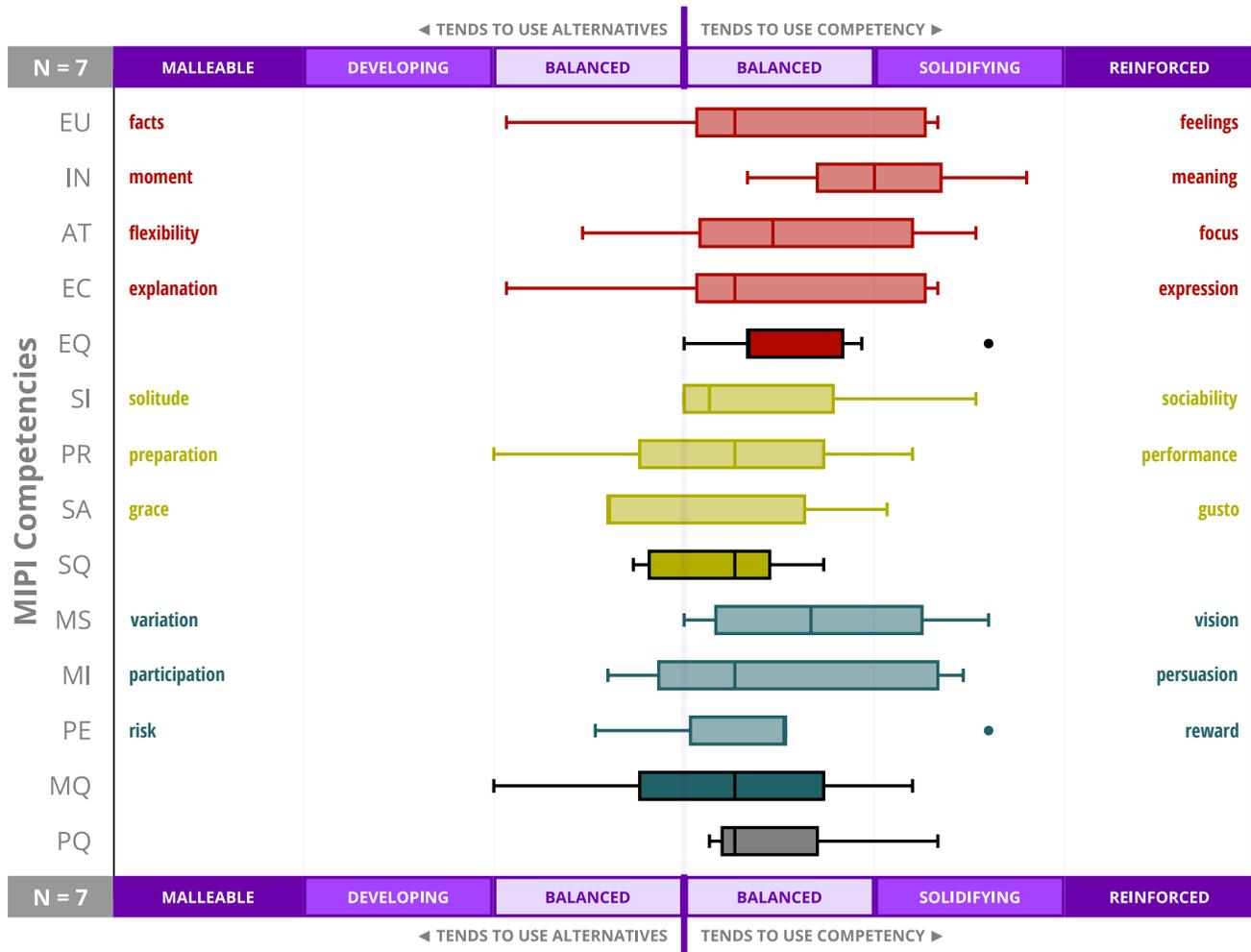
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GROUP REPORT

Prepared on behalf of: Geoff Crane
 For named workgroup: Lab Group

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The following boxplot shows how each of your clients collectively performed on the MIPI assessments you sent them in the above-noted order. You may cut and paste a screen shot of the contents of the box below for use in your workshop materials.



- EU** EMOTIONAL UNDERSTANDING (prioritizing facts vs. prioritizing feelings)
- IN** INTROSPECTIVENESS (living in the moment vs. looking for meaning)
- AT** ATTENTIVENESS (maintaining flexibility vs. maintaining focus)
- EC** EMOTIONAL COMMUNICATION (offering explanation vs. offering expression)

- SI** SOCIAL INTEGRATION (seeking solitude vs. seeking sociability)
- PR** PERFORMANCE READINESS (emphasizing preparation vs. emphasizing performance)
- SA** SOCIAL AGENCY (demonstrating social grace vs. demonstrating social gusto)

- MS** MOTIVATIONAL SELF-EFFICACY (enjoying variation vs. developing vision)
- MI** MOTIVATIONAL INFLUENCE (passive participation vs. active persuasion)
- PE** PERSEVERANCE (prioritizing risk vs. prioritizing reward)

- EQ** EMOTIONAL INTELLIGENCE
- SQ** SOCIAL INTELLIGENCE
- MQ** MOTIVATIONAL INTELLIGENCE
- PQ** PERSONAL INTELLIGENCE

COMPETENCY LEGEND

The following tables present means and standard deviations (which represent competency hextiles and group consistency) based on an N of 7 respondents. Notes on group makeup follow.

EMOTIONAL COMPETENCIES

Dimension	Mean	Hextile	SD	Magnitude
EU	48.29	4	10.98	divergent
IN	60.43	5	7.32	consistent
AT	54.00	4	11.17	divergent
EC	52.14	4	12.43	highly divergent

This group shows strong emotional capacity overall, with a shared strength in introspection. However, there is wide variation in how members identify, focus on, and communicate emotions, leading to inconsistent emotional expression and impact in real-world interactions.

SOCIAL COMPETENCIES

Dimension	Mean	Hextile	SD	Magnitude
SI	51.00	4	9.22	consistent
PR	46.14	4	4.60	highly consistent
SA	46.43	4	9.57	consistent

The group demonstrates stable and cohesive social functioning, with a shared ability to engage with others and perform in social or structured settings. Social behaviours are generally predictable, creating a reliable foundation for collaborative work.

MOTIVATIONAL COMPETENCIES

Dimension	Mean	Hextile	SD	Magnitude
MS	56.00	4	9.17	consistent
MI	53.00	4	11.75	divergent
PE	51.14	4	9.63	consistent

The group shares solid motivational capacity and follow-through, but differs significantly in how effectively members influence others. Some individuals readily move people to action, while others struggle to translate motivation into impact.

The following analysis describes the respondents as a group, identifying key features.

RESTATED PROBLEM:

Despite producing high-quality insights and demonstrating strong commitment to their work, the group's recommendations are not consistently shaping decisions within the organization. Stakeholders report that valuable analysis sometimes fails to gain traction, particularly in fast-paced or high-stakes discussions. Understanding why this happens requires examining not only individual competencies, but how those competencies function collectively within the team's real-world context.

WHAT THIS GROUP IS NOT:

Based on both the organizational intake and the group's MIPI profile, the team is not experiencing challenges typically associated with poor training outcomes. Specifically, this group is not:

- disengaged or unmotivated
- lacking in effort or follow-through
- socially avoidant or uncomfortable working with others
- deficient in foundational emotional or social skills
- hesitant to participate in structured performance situations
- struggling with self-awareness or reflection

This indicates that the team has a strong base on which to build, and that the current challenge is not rooted in a lack of skill or capability.

WHAT THIS GROUP IS:

The group profile shows a team that is:

- highly introspective, with solidifying psychological mindedness
- motivated and persistent in pursuing goals
- socially cohesive and comfortable engaging with colleagues
- consistent in performance readiness when expectations are clear
- capable of expressing emotional meaning when they choose to

However, the team also demonstrates:

- wide variation in emotional communication
- differing attentional styles during interaction
- inconsistent influence behaviours in group settings
- uneven deployment of skills under social or time pressure

These patterns mean that while the group can influence effectively, this does not occur reliably across members or situations.

In this context, the core issue is not the ability to generate insight—it is the ability to ensure that insight lands, gains support, and drives action. When influence and emotional communication vary widely within a team, the impact of their work depends too heavily on who is speaking rather than the quality of the recommendation itself.

This explains why strong analysis does not always translate into organizational change, and why aligning real-time communication and influence behaviours is likely to produce significant gains.

CURRICULUM PRIORITIES

Based on the group's profile and the organizational context, the most impactful areas for development are:

1. Motivational Influence (MI)
Strengthening the consistency with which team members are able to move others to action.
2. Emotional Communication (EC)
Enhancing the expression of meaning and relevance in fast-paced or high-stakes discussions.
3. Social Agency (SA)
Increasing the likelihood that individuals will insert their perspectives at key moments.
4. Attentiveness (AT)
Supporting focus and responsiveness during dynamic conversations.

These competencies represent the greatest opportunity for improvement in real-world outcomes.

WHY THESE PRIORITIES MATTER

The group already demonstrates strong internal emotional insight, solid motivation and perseverance, cohesive social functioning and consistent performance readiness.

However, wide variation in emotional communication and influence behaviours means that the impact of the team's work depends too heavily on who delivers the message. Improving the consistency with which insights are communicated and championed will directly address the stated concern that recommendations are not reliably shaping decisions.

EXPECTED IMPACT

Targeting these priorities is expected to:

- increase stakeholder adoption of recommendations
- improve clarity and resonance of messaging
- elevate cross-functional influence
- create more consistent representation of ideas
- reduce dependence on a small number of vocal individuals
- accelerate decision-making

This should align influencing behaviours in a way that allows high-quality insights to drive meaningful organizational change.

WHAT WE WILL NOT PRIORITIZE

Equally important is recognizing areas where further training would be unnecessary or inefficient. Given the group's strengths, we will *not* focus on:

- building motivation
- developing perseverance
- foundational emotional skills
- team cohesion or bonding
- confidence in structured performance settings

These competencies are already well-developed and consistent across the team, and additional training in these areas would not meaningfully address the organization's goals.

RECOMMENDATIONS

Building on the priorities identified in the previous section, we recommend a structured developmental pathway designed to strengthen how the Product Insights team communicates, positions, and advances its recommendations within Phoenix Analytics. The team already demonstrates strong analytical skill, solid motivation, and cohesive social functioning. The opportunity now is to help members apply these strengths more consistently in the kinds of conversations where product direction is shaped—particularly those that are fast-moving, cross-functional, or influenced heavily by confident communicators.

Given the team's role demands and the cultural norms of the organization, the training approach will emphasize clear, logic-forward communication, steady presence under pressure, and practical strategies for bringing insights into discussions at the right moments. The aim is not to introduce unfamiliar behaviours, but to support team members in expressing meaning, relevance, and intent in ways that fit naturally with Phoenix's analytic, concise, and efficiency-oriented communication style.

The developmental sequence will be delivered remotely via Zoom in biweekly 90-minute sessions to accommodate sprint cycles and existing cognitive load. Each session will include guided exploration, structured discussion, and focused practice activities that mirror the communication environments the team regularly encounters. These activities will remain lightweight and actionable, offering opportunities to test small behavioural refinements that can be applied immediately to day-to-day interactions.

AREAS OF EMPHASIS

- **Influence Behaviours**
Strengthening the consistency with which recommendations are framed, supported, and championed across different audiences and settings.
- **Emotional Communication**
Enhancing the expression of meaning and relevance in ways that maintain clarity, respect cultural expectations, and help insights resonate more reliably.
- **Social Agency**
Increasing the likelihood that team members insert their perspective at key conversational moments, particularly in competitive or fast-paced discussions.
- **Attentional Presence**
Supporting responsiveness and focus during dynamic exchanges where decisions evolve quickly and opportunities to contribute may be brief.

Overall, the intention is to create a communication environment in which high-quality insights can influence product direction more consistently, regardless of who presents them. By reinforcing the behaviours that support clarity, presence, and timely contribution, the team will be better positioned to shape decisions during Phoenix Analytics' transition toward a scalable product model.