
THOUGHT LEADER WORKSHOP

Portfolio Engagement | Diagnostic Series

Diagnostic Walkthrough

Using the Creator Profile Quiz and Retreat Transformation Audit to identify design gaps.

Engagement details anonymized to protect client intellectual property.

Ryan Howard

Educational Psychologist | Instructional Designer

thoughtleaderworkshop.com

Our Diagnostic Approach

Every engagement begins with two diagnostic instruments designed to give both the retreat host and our team a clear, scored picture of where the experience is strong and where the architecture needs work.

INSTRUMENT 01

Creator Profile Quiz

A 25-question psychometric assessment that maps the retreat host's natural design strengths and growth edges across seven dimensions: Vision and Structure, Depth of Transformation, Facilitation Style, Community Orientation, Measurement Mindset, Ecosystem Thinking, and Scalability.

The quiz produces one of five creator archetypes, each with a tailored report highlighting the host's strongest design instincts and the areas most likely to limit their retreat's impact and business performance.

INSTRUMENT 02

Retreat Transformation Audit

A structured audit that scores the retreat itself across the five phases of the Transformation Arc: Encounter, Activation, Friction, Integration, and Continuation.

The audit produces a visual scorecard showing where the experience design breaks down — not based on subjective impressions, but on how well each phase is architecturally supported.

WHY TWO INSTRUMENTS

One instrument measures the designer. The other measures the design. Together, they show both where the host's instincts are pulling the program and where the architecture itself needs reinforcement.

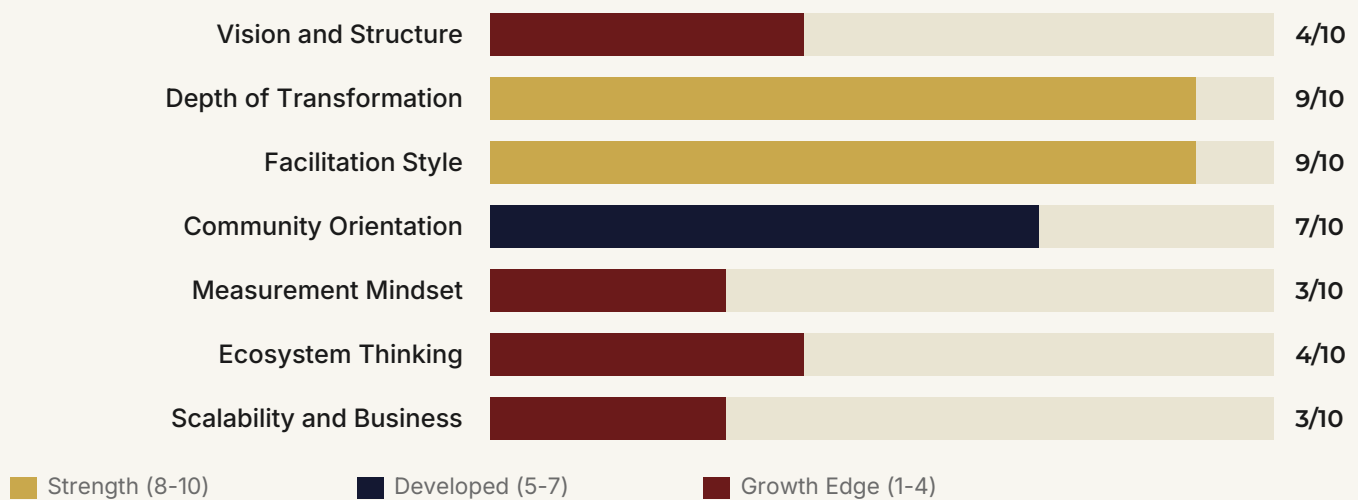
Sample Creator Profile

ARCHETYPE

The Mystic Facilitator

A retreat host with extraordinary intuitive facilitation gifts and deep emotional intelligence, but limited structural design and measurement systems. Creates powerful in-the-moment experiences that often lack the architecture needed for lasting transformation and business scalability.

ASSESSMENT RESULTS — SEVEN DIMENSIONS



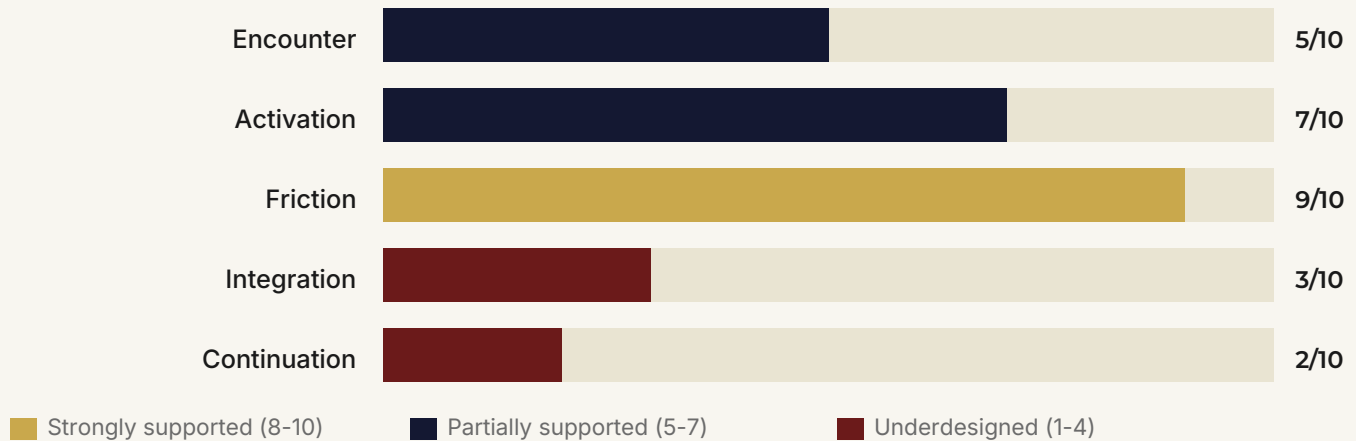
KEY INSIGHT

This profile reveals a common pattern: exceptional facilitation talent paired with under-developed structural and business design. The host's retreats feel transformative in the room but struggle with enrollment consistency, post-retreat retention, and pricing confidence.

Sample Retreat Audit

TRANSFORMATION ARC SCORECARD

Scored across five phases



KEY FINDINGS

1

High Friction, Low Integration

The retreat produces intense emotional and somatic experiences but provides almost no structured time for participants to process, integrate, or make meaning of what happened.

2

No Continuation Architecture

Participants leave with no protocol, no peer support, and no pathway back to the host's other offerings. The transformation has nowhere to go.

3

Encounter Needs Safety Design

The opening sequence moves into vulnerable practices before participants feel psychologically safe. This limits how deep the Friction phase can go and increases the risk of participant withdrawal.

Charting the Path Forward

The combined diagnostics produce a clear, prioritized action plan. For this particular engagement, the path forward focused on three high-leverage interventions:

01

INTERVENTION 01

Restructure the Encounter Phase

Design a calibrated arrival sequence that builds safety and trust before introducing vulnerable practices. This enables deeper, more productive Friction later.

02

INTERVENTION 02

Build a Dedicated Integration Architecture

Add structured integration time (guided reflection, Catalyst Pods, Micro-Pacts) so that the powerful experiences created during Friction translate into lasting behavioral change.

03

INTERVENTION 03

Design a Continuation Ecosystem

Create a post-retreat pathway that connects participants to the host's coaching practice, quarterly integration circles, and community, turning a one-time event into a year-round relationship.

DESIGN THESIS

These interventions address the specific gaps identified by the diagnostics. Each one strengthens both the participant's transformation and the host's business model — because in well-designed live experiences, those two outcomes are inseparable.

NEXT STEPS

Try the Diagnostics Yourself

INSTRUMENT 01

Creator Profile Quiz

thoughtleaderworkshop.com/assessment.html

INSTRUMENT 02

Retreat Transformation Audit

thoughtleaderworkshop.com/transformation-audit.html

To explore what these diagnostics reveal about your retreat, book a Program Clarity Session.

THOUGHT LEADER WORKSHOP

thoughtleaderworkshop.com

Ryan Howard
Educational Psychologist | Instructional Designer