

Creating Value Through Innovation



Corporate Social Responsibility Report



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2021

Letter from our CEO

Corporate Social Responsibility ensures that a company's economic growth is beneficial to all its stakeholders, including suppliers, employees, advisors, and clients, while minimizing its impact on the environment. Prelude Solutions Corporate Social Responsibility (CSR) policy is our commitment as an organization to operate as a responsible and ethical participant in the global community. We acknowledge that as a company, we have an impact on the world and the people in it. Our actions impact our employees, our clients and suppliers, the communities in which we live and work, and the environment.

I am honored to present our 2021 Corporate Responsibility (CSR) Report, which provides an update on Prelude Solutions progress and commitment to social responsibility.

In 2021 we made many positive changes to reflect our dedication to serve our clients and community. Not limited to our partnership program, onboarding of 6 new employees, monthly accountability meetings, sales coaching and team cultural development.

I would like to thank our stakeholders for their continued support of Prelude Solutions as we strive to improve the lives of our clients, suppliers, advisors, employees and the communities in which we live and work.



Sincerely,
Cate Heaman
Principal/CEO

About Prelude Solutions



Prelude Solutions is a woman owned telecommunications consulting company helping organizations explore options for optimizing current communication platforms, through in-depth auditing, creating and validating the ROI, service and solution selections, project management, and recommendations for telephone and contact center roadmaps. Prelude performs an in- depth analysis of client's communication services and systems with the objective of reducing costs through pure savings, credits, erroneous charges, and service realignment. We save our clients an average of 33% on their telecom spend using a contingency fee-based model. Additionally, we provide a roadmap for the future as we look to our 260 + partners for services and solutions.



**FOUNDED
IN 2016**



**CERTIFIED
WOMAN OWNED**



**15
EMPLOYEES**



**SMALL
BUSINESS**



**260+
PARTNERS**



Prelude's Profile

What We Do

At Prelude Solutions, we perform in-depth analysis of client's communication services and systems with the objective of reducing costs through pure savings, credits, erroneous charges and service realignment.

Our People

Our talented group, with over 30 years of experience, helps organizations optimize, design and implement their company's entire communication services platform.

Our Mission

Our mission is to help businesses optimize their processes and services through the use of our technical, analytical and unified communications consulting practices while providing exceptional customer service.

Our Core Values

- **Transparency** - Characterized by visibility or accessibility of information especially concerning business practices
- **Accountability** - The quality or state of being accountable especially an obligation or willingness to accept responsibility or to account for one's actions
- **Equity** - The quality of being fair and impartial
- **Motivation** - The process that initiates, guides, and maintains goal-oriented behaviors
- **Development** - The process in which someone or something grows or changes and becomes more advanced

At Prelude Solutions, we are passionate about improving the social, economic and environmental conditions in the communities where we operate. We are proud to be recognized by these organizations.



Prelude Solutions earned recertification as a Women's Business Enterprise (WBE) by Women's Business Enterprise National Council (WBENC) for the fourth year in a row!



Prelude Solutions was named as one of the 100 fastest growing companies in the Philadelphia region with Philadelphia100® for the second year in a row. The Philadelphia100® is a merit based program. Only companies that are among the fastest growing, privately-held companies are awarded the Philadelphia100® designation. The integrity of the process and the resulting list makes the Philadelphia100® one of the most sought awards in the region.



Prelude Solutions earned recertification as a Woman Owned Small Business (WOSB) by Women's Business Enterprise National Council (WBENC) for the third year in a row!

Giving Back

Prelude Solutions takes pride in sponsoring and donating to charitable causes in our communities. Our employees are encouraged to volunteer and support organizations that mean the most to them and their communities.



2021 Corporate Impact



\$100,000+ donated to charities, nonprofits and community events



16 nonprofit clients served



over \$10 million in telecom savings to be repurposed for corporations



7 partnerships for in-kind contributions

Bootcamp Program

Seeking to help recent college graduates launch job searches in a unique hiring environment, Prelude's networking group put their heads together to create a training designed to: Boost networking skills, hone elevator pitches and build confidence. The eNRGy group offers this free skill-building program to Class of 2020-2021. Since 2020, 12 students have graduated from this program.

Event Sponsorship

Prelude sponsored events that directly contributed to Barclay Friends, William Way, Home of the Sparrow, Northlight Community Center, Catholic Partnership Schools, March of Dimes, YMCA, TANGO, Project Refit, CCIU, Help Hope Live, and WBENC.

CSR Programs

- Prelude contributed to five nonprofit organizations during the holidays
- Prelude donated 100% of realized savings from our telecom audit back to Philadelphia Museum of Art and Philadelphia Zoo with additional concessions to University of the Arts, Valenz, Plymouth Place Senior Living, Independent Mission Schools and Catholic Partnership Schools

Prelude Corporate Matching

There is power in collective action. Prelude Solutions financially matches donations that our employees make to nonprofit organizations. Donation matching encourages a spirit of financial and charitable responsibility while making an impact on our communities and supporting the causes that mean the most to our employees.



Women's Business Enterprise National Council (WBENC) Give Back Program

- Prelude served 4 Women's Business Enterprises (WBE) this year
- Prelude donates up to 5% of Prelude's portion of realized savings from our telecom audit back to WBENC based on telecom savings achieved from WBEs and corporate members of WBENC
- Prelude serves on 2 separate committees for WBEC East
- Prelude provides "best practices" to other WBEs on preparing their Capability Statement
- Prelude's CEO Cate Heaman was a nominee for a WBE Leadership award for her efforts aiding women-owned businesses to become WBENC certified



Board Positions

Prelude encourages and supports its team members to serve on the following boards: HealthWorks Academies, Meals On Wheels, PHL Diversity Board, WBENC National, WBEC-East, and March of Dimes.

Environmental Impact

Prelude Solutions carefully selects our preferred suppliers based on their sustainability commitments.

Prelude is a **virtual first organization** that utilizes shared office space for collaborations.

To decrease carbon footprint, Prelude helps organizations migrate from premise-based solutions to software and cloud solutions.

Diversity Inclusion

Prelude strives to work with minority and veteran owned businesses for products and services allocating 30% of our spend towards Diversity and Inclusion.

Ethical Compliance

Prelude Solutions will always:

- Respect and uphold all applicable local, state and federal laws to the best of our abilities
- Keep all partnerships and collaborations transparent and open
- Ensure that all business transactions and relationships are free of influence and bribery
- Honor all internal policies
- Comply with privacy laws and expectations

Our Focus for 2022

- Continue to provide our clients an average of 33% savings on their telecom expenses
- Provide job and career opportunities to persons of all backgrounds
- Implement Cultural Core Values program
- Continue to donate a percentage of our savings to the following organized partnerships; WBENC, PAISBOA, and Campus Consortium
- Continue to support our community with volunteering, financial donations and corporate matching
- Implement a percentage back program to nonprofits of choice



A Glimpse Into the Future

In 2022, Prelude Solutions continues to dedicate our time and effort into strengthening our communities, associates and clients.

We are proud of our accomplishments and know that there is additional work to complete. We vow to continue to support our communities, women in business, as well as minority, diverse and veteran owned businesses, and stakeholders.

Together let's be great.

Thank you for your endless support!





**Prelude
Solutions™**