



## 2022 Corporate Social Responsibility Report and 2023 Goals

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We are thrilled to share our passion for Corporate Social Responsibility in this report. At Prelude Solutions, our commitment to integrity, empathy, and purpose fuels everything we do, from our interactions with employees, suppliers, and clients to our broader impact on the community.

In 2022, we took significant steps towards our CSR goals, including welcoming eleven new team members, implementing monthly accountability meetings, launching our Move the Eye program, investing in coaching and continuing education, and choosing partners that understand the importance of cultural alignment while fostering cultural development.

We are most proud of achieving a 33% diverse spend which exceeded our goal of 30%!

I am humbled and grateful for the support we have received from our stakeholders on this journey towards a brighter future. As we move forward, we invite you to join us in empowering progress and shaping a more responsible, sustainable, and compassionate tomorrow.



Sincerely,  
*Cate Heaman*  
CEO



## Optimizing Communication Efficiencies: Prelude Solutions' Expertise in Telecommunications

Prelude Solutions is a woman-owned telecommunications consulting firm dedicated to helping organizations streamline their communication platforms. Our services include in-depth auditing, ROI validation, service and solution selection, project management, and roadmap development for telephone and contact center systems. Our aim is to reduce costs and maximize savings for our clients through thorough analysis of their communication services and systems. On average, our clients save 33% on their telecom expenses through our contingency fee-based model. We have a wide network of over 400 partners to provide the best services and solutions for our clients' future needs.



**FOUNDED  
IN 2016**



**CERTIFIED  
WOMAN OWNED**



**25  
EMPLOYEES**



**SMALL  
BUSINESS**



**400+  
PARTNERS**



**45+  
SERVICES**

## What We Do

We take a comprehensive approach to analyzing our clients' communication services and systems. Our goal is to identify opportunities for cost savings by uncovering and correcting issues such as erroneous charges, unnecessary services, and inefficient service plans. With our focus on delivering tangible results and maximizing ROI for our clients, we strive to ensure that they are getting the most value out of their communication investments. Through our expertise and commitment to excellence, we work closely with our clients to optimize their communication services and achieve their business objectives.

## Our People

Our team of highly skilled professionals each have over 20 years of experience specializing in assisting organizations optimize, design, and implement their entire communication services platform. Through our expertise, we aim to help our clients achieve their strategic objectives while streamlining their operations and improving their overall performance. With a deep commitment to excellence and a focus on building strong and lasting relationships with our clients, we are dedicated to delivering the highest level of service and support.

## Our Mission

Our mission is to provide innovative and effective solutions that enable our clients to achieve their goals and improve their bottom line. We are dedicated to delivering exceptional value and service, leveraging the latest technologies and best practices to help our clients stay ahead of the curve. With a focus on building long-term partnerships and empowering our employees to achieve their full potential, we are committed to making a positive impact in our communities and beyond.



### Integrity

We are committed to honesty, transparency, doing what we say we will do, and always doing the right thing.



### Innovation

We innovate by finding a better way through continuous improvement, partner relationships, sharing knowledge and experiences.



### Equity

We believe in equitable, fair, and impartial treatment in all business practices and relationships. We acknowledge and respect the unique perspectives we each bring to our work.



### Development

We invest in each other and offer an environment with opportunities for both personal and professional development.



### Community

We believe in the power of communities, and actively give back to those communities in which we live and work.





This honor is awarded to WBEC-East certified Women Business Enterprises (WBEs) and WBEC-East Council Member Organizations that have demonstrated a commitment to advancing diversity, equity and inclusion (“DE&I”) within their company, industry, and community.



Prelude Solutions was named as one of the 100 fastest growing companies in the Philadelphia region with Philadelphia 100® for the third year in a row. Only companies that are among the fastest growing, privately-held companies are awarded the Philadelphia 100® designation.





# Charitable Contributions



## Prelude Solutions Corporate Impact



**125 clients served**



**over \$15M in savings**



**25 non-profits served**



**33% spent with diverse suppliers**



**over \$70,000 donated**



**50+ events sponsored**

## Team Collaboration Summit

Prelude Solutions took part in a day-long summit aimed at redefining our core values. Our objective was to create a set of values that truly reflect not just our corporate identity, but also our personal beliefs and principles. This intensive effort is a testament to our commitment to fostering a strong and authentic company culture that resonates with our employees and clients alike.

## Give Back Program

Prelude Solutions introduced a new program that we have integrated into all of our Statements of Work (SOWs). Under this program, we commit to donating a portion of the savings that our clients achieve through our services back to a non-profit organization of their choosing. We are proud to have taken this step towards a more socially responsible and purpose-driven approach to our work, demonstrating our ongoing commitment to creating meaningful and positive impact in our communities.

## Volunteer Day

We encourage our employees to volunteer with an organization that holds significance for them by offering one paid day off each calendar year. We believe in the power of giving back to our communities and are committed to supporting our employees in their efforts to make a positive impact.

## Tuition Reimbursement

We believe in supporting our employees' professional development and growth. As part of our commitment to fostering a culture of continuous learning, we have implemented a tuition reimbursement program that is available to all employees. This program is designed to provide financial assistance to employees who wish to further their education and acquire new skills and knowledge that can benefit both themselves and the company.

## Donation Matching

We recognize that our employees have diverse interests and passions, and we respect and celebrate their individuality. We encourage our employees to donate to the organizations they hold near and dear to their hearts, and we will match their contribution. We believe that by empowering our employees to support causes that align with their values, we can create a more engaged and socially responsible workforce, and contribute to building a better world.

## Charitable Contributions

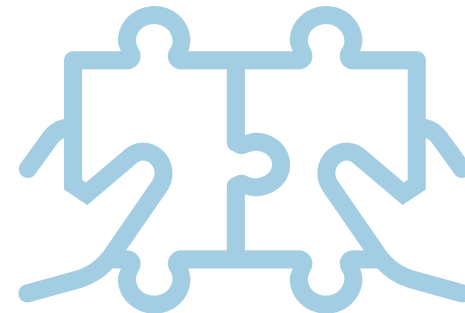
We believe in giving back to our community and supporting causes that are important to us. As part of our commitment to social responsibility, we have decided to forego traditional client gifting during the holiday season and instead, make donations to 10 nonprofit organizations each year in our clients' name.



## Social Media Awareness

At Prelude Solutions, we believe that social responsibility is a key pillar of our corporate identity. We understand that we have a responsibility not just to our employees and stakeholders, but to the wider world around us. That's why we take pride in leveraging our social media channels to promote the causes that matter to us, and to inspire others to get involved in making a positive difference.

Through our efforts to raise awareness, we are able to shed light on the incredible work that organizations around the world are doing to address pressing social, environmental, and health issues. We share their stories, amplify their voices, and connect them with the resources and support they need to continue making a meaningful impact.



At Prelude Solutions, we are proud to support and empower Women's Business Enterprises (WBEs) in our community. This year, we had the privilege of supporting **twenty-two** WBEs and three WBENC Corporates and helping them achieve their goals through our innovative solutions and expertise.

We understand that one of the biggest challenges facing WBEs is access to resources and support, which is why we are committed to giving back to this community. That is why we donate a portion of the savings from our telecom audits back to the Women's Business Enterprise National Council (WBENC).

In addition to our financial support, we are also actively engaged in the WBENC community. Our CEO, Cate Heaman, serves on committees for WBEC East, providing her expertise and insights to help drive the growth and success of WBEs. We are committed to sharing our knowledge and experience with other WBEs, offering "best practices" on preparing their capability statement, and how to prepare, navigate, and follow up for the WBENC National Conference.

We are proud to be a part of the WBE community and to play a role in its growth and success. We believe that by supporting WBEs, we are not only helping to drive economic growth and innovation, but also creating a more equitable and inclusive future for all.

## Prelude Solutions Serves on Various Boards and Committees



When choosing our suppliers, we prioritize those who have demonstrated a clear commitment to sustainable practices, including reducing their environmental impact, promoting ethical labor standards, and engaging in transparent and responsible business practices. We work closely with our suppliers to understand their operations and ensure that they align with our values and commitments.

We believe that sustainability is not just a checkbox item or a buzzword - it is a fundamental principle that should guide all aspects of our business. That's why we have taken a number of steps to reduce our own environmental impact and promote sustainability throughout our operations. These include:



Utilizing shared office space to reduce carbon footprint



Employees powering down at night to save energy



Carpooling or using public transportation for all events



Encouraging employees to participate in sustainability events



Waste reduction from use of digital only documents



Help clients migrate to cloud to reduce carbon footprint



**We are deeply committed to creating and maintaining a workplace that is inclusive and equitable for all employees. We recognize the value of diversity and believe that each member of our team brings a unique perspective and skill set to the table. This diversity enriches our ability to understand the world, identify challenges, and develop innovative solutions.**

**We believe that inclusion is the key to unlocking the full potential of diversity, and we work hard to cultivate a sense of belonging and empowerment for all members of our team. We actively listen to the voices and experiences of our diverse communities, and value the relationships we have with our diverse suppliers.**

**At Prelude Solutions, we are passionate about creating a work environment where everyone feels valued and respected. We believe that by embracing our differences and encouraging open and honest communication, we can create a stronger and more dynamic workplace for all.**

### DE&I

We are committed to promoting diversity and inclusion in all aspects of our business. As part of this effort, we actively seek out partnerships with minority, woman-owned and veteran-owned businesses to provide products and services for our operations. Our goal is to allocate 35% of our spend specifically towards supporting these important communities and empowering them to thrive. By embracing diversity in our supplier network, we aim to create a more equitable and just marketplace, while also delivering high-quality products and services that meet our customers' needs.

### Supporting Fellow WBEs

We are dedicated to supporting and empowering other Women's Business Enterprises (WBEs). As part of this mission, we have set a goal to donate \$25,000 through our give-back program in 2023, which is designed to give back to the communities we serve. By investing in WBEs and supporting their growth, we believe that we can create a more inclusive and thriving economy.

### Serving WBENC Corporates

We are committed to serving Women's Business Enterprise National Council (WBENC) Corporates and helping them achieve their goals. To that end, we have set a goal to provide our services to at least five new WBENC Corporates in 2023. By leveraging our expertise and resources to support these organizations, we believe that we can drive positive change and create mutually beneficial partnerships that strengthen our community.

**Our future objective is to increase diversity and inclusion in all aspects of our business by expanding our partnerships with minority, woman-owned, LGBTQ+, and veteran-owned businesses. By the end of 2023, we aim to allocate 35% of our spending towards these communities, empowering them to grow and contribute to a more equitable and just marketplace.**

**To support Women's Business Enterprises (WBEs), we will continue to help women become certified and volunteer our time to serve on additional WBENC committees. As part of our continued dedication to supporting WBEs, we will increase our give-back program donation goal to \$25,000 in 2023. We will expand our support of Women's Business Enterprise National Council (WBENC) Corporates by providing our services to at least five organizations in 2023.**

**Furthermore, we will implement a comprehensive diversity and inclusion training program for all employees. This program will educate and empower our workforce to embrace diversity and promote inclusion in the workplace. We believe that a diverse and inclusive workforce can lead to innovative ideas, increased creativity, and better decision-making.**

**Through these efforts, we will continue to prioritize diversity and inclusion in all aspects of our business and work towards creating a more equitable and just marketplace for everyone. We are committed to empowering underrepresented communities to thrive and contribute to a brighter future.**

*Thank you for your endless support!*

