

CSR/ESG REPORT

BEYOND SAVINGS: OUR COMMITMENT
TO PEOPLE, PLANET, AND PROGRESS

20
24





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Letter from our CEO



**Cate
Heaman**

CEO Prelude Solutions

At Prelude Solutions, we believe that purpose drives action, and in 2024, that belief continued to guide every decision we made.

This year's CSR and ESG report reflects not just what we've accomplished, but why we do what we do. Whether it's delivering meaningful cost savings for our clients, supporting women-owned businesses, or giving back through the Prelude Cares Network, our team remains deeply committed to using our platform for good.

Inclusion sparks innovation, and we've seen firsthand how diversity in perspectives fuels better outcomes, for our company, our clients, and our community. From supporting nonprofits, to investing in organizations that champion equity and education, we've continued to align our business success with social responsibility.

To our incredible associates, thank you for leading with compassion and integrity. To our clients and partners, thank you for trusting us as stewards of your technology and your mission. To our stakeholders, your support empowers us to make a measurable difference in the world around us.

Let's continue to build a future that values purpose.

"When compassion is your compass, every choice becomes an opportunity to create change. It's not just about doing good, it's about doing what's right, consistently, and with intention. That's how we turn purpose into action, and action into impact."

Company Overview



Founded in 2016

Prelude Solutions is a technology consulting firm that helps organizations optimize communication platforms and uncover cost savings.

We specialize in technology audits, platform optimization, contract negotiations, vendor management, and market analysis, all designed to improve efficiency and reduce costs.

Our process begins with a comprehensive audit and inventory, followed by unbiased recommendations sourced from over 500 providers. On average, clients save 33%, and through our contingency-based model, we only get paid when we deliver results.

Our partnerships don't end with savings. We provide ongoing support to help clients stay optimized and future-ready.

Smart savings. Lasting support.

That's the Prelude way.

Key Information



Certified Woman-Owned Business



Certified Small Business



15 Team Members



500+ Trusted Providers



Prelude's Profile

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What We Do

We view cost optimization as a form of corporate responsibility. By conducting a thorough analysis of our clients' communication services and systems, we identify and address issues such as erroneous charges, outdated contracts, and inefficient service plans, reducing waste and improving transparency. Our work helps organizations redirect resources toward their missions while ensuring responsible stewardship of their technology investments. Through close collaboration and a shared commitment to excellence, we empower our clients to make smarter, more sustainable decisions that align with both business goals and broader social impact.

Our People

With over 300 years of combined industry experience, our team of seasoned professionals brings deep expertise in optimizing, designing, and implementing communication service platforms. We partner with organizations to streamline operations, enhance performance, and align technology with strategic goals. More than just consultants, we are long-term collaborators, committed to delivering exceptional service, fostering trusted relationships, and driving meaningful, sustainable outcomes for the communities and clients we serve.

Our Mission

Our mission is to deliver innovative, results-driven solutions that empower clients to grow, thrive, and reinvest in what matters most. By combining cutting-edge technologies with industry best practices, we help organizations stay ahead of the curve while maximizing value. We're equally committed to building long-term partnerships, investing in our team, and making a positive impact in the communities we serve, proving that profitability and purpose can go hand in hand.



Core Values

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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.



Certifications

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Recognition

Philadelphia100® Hall of Fame #11

Prelude was named as one of the 100 fastest growing companies with Philadelphia100® for the fifth year in a row.

Best Places to Work

The Best Places to Work award, presented by the Philadelphia Business Journal, honors companies that prioritize employee satisfaction, culture, and engagement.

Inc. 5000 Fastest Growing #1626

The Inc. 5000 list is a prestigious ranking of the fastest-growing private companies in the US. It showcases businesses that have demonstrated substantial revenue growth.

DEI Honor Roll

Presented by WBEC-East this award recognizes certified WBEs and Council Member Organizations that have shown exceptional commitment to DEI principles.

American Water Supplier of the Year

Prelude was honored as American Water's Corporate Services Supplier of the Year for delivering exceptional technology savings, service, and strategic value. This award recognizes Prelude's role as a trusted partner driving measurable results and long-term impact.



Recognition Continued

Titan100 CEO

Cate Heaman was honored with the Titan 100 award, recognizing the top 100 CEOs and C-level executives in the region. The program celebrates exceptional leadership, vision, passion, and influence in both the private and public sectors.

WBE Star

The WBE Star Award is the nation's premier recognition for excellence among women-owned businesses. Presented by the Women's Business Enterprise National Council (WBENC), it honors 14 exemplary women business leaders annually, each representing one of WBENC's 14 Regional Partner Organizations.

Corporate Leadership Award

Bob Healey, COO of Prelude Solutions, was honored with the Philadelphia Business Journal's Corporate Leadership Award for his exceptional leadership, operational impact, and commitment to purpose-driven growth.

Philly's Fast 50

Philadelphia Business Journal's Philly's Fast 50 recognizes the fastest-growing private companies in the Greater Philadelphia area. Honorees are selected based on average two-year revenue growth, highlighting businesses that have achieved significant expansion and impact in the region.



The Prelude Cares Network



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Prelude Solutions is proud to give back through our Prelude Cares Network (PCN), donating % of our revenue to support a wide range of community-driven initiatives and nonprofit partners.

Prelude Solutions is redefining how businesses support nonprofit organizations through the Prelude Cares Network (formerly PCCP). Launched in 2022, PCN has contributed over \$100,000 to a diverse group of charities, demonstrating our belief that businesses can, and should, be a powerful force for good.

Through PCN, we donate a percentage of revenue from every technology audit and new service engagement, with clients selecting a nonprofit to receive the contribution, at no cost to them. These donations never reduce our clients' savings and are made in their honor, strengthening their own social impact.

By transforming recovered technology savings into philanthropic support, PCN offers a sustainable, no-risk way for businesses to give back. It's smart giving, made simple.



Charitable Contributions

Here are the organizations we proudly supported in 2024, both through the Prelude Cares Network (PCN) and beyond.



Measuring Impact

Prelude Solutions is deeply committed to supporting our clients, community, and fellow diverse-owned businesses. To measure our impact, here are our 2024 statistics:

Clients	Contributions	Diverse Spend
140 Clients Supported	\$77K Contributed to Charities/Nonprofits	37% Spent with Diverse-Owned Businesses
\$9.6M In Savings Found for Clients	65 Events Sponsored	42% Spent with Local Businesses



CSR Programs

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People Empowerment Program

This program fosters a culture of growth and well-being among employees, focusing on health in a remote-first workplace. Led by Francesca Zampaglione of the Empowerment League, the program aims to empower employees, enhance their work-life balance, and promote a supportive and inclusive work environment.

Prelude Cares Network

Prelude Solutions allocates a percentage of our portion of savings fees to donate back to our nonprofit clients. For our for-profit clients, we offer them the opportunity to select a charity for us to donate to, ensuring our contributions align with the causes that matter most to them.

Volunteer Day

Prelude Solutions offers all employees a paid day off to volunteer for a cause close to their hearts. This initiative demonstrates Prelude's commitment to supporting community involvement and employee well-being.

Self-Care Day

Prelude Solutions offers employees a paid day off around their birthday, encouraging them to indulge in self-care. To enhance wellness and boost morale, employees also receive a stipend to spend on themselves.



CSR Programs

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Training and Development Program

Prelude Solutions invests in its team member's growth by offering training and development programs, continuing education stipends, and a variety of courses to further their knowledge and skills. This commitment to ongoing learning helps team members stay ahead in their fields and contributes to their professional development.

Donation Matching

Prelude Solutions actively supports team member's charitable efforts by matching donations year-round. Additionally, during the holiday season, team members choose a charity for Prelude to contribute to, furthering the company's commitment to philanthropy and community impact.

Satell Institute Membership

Prelude Solutions recently became a member of the Satell Institute, pledging to donate \$100,000 to WBEC-East over the next four years. This commitment underscores Prelude's dedication to supporting women-owned businesses and making a positive impact in their community.

WBENC Give Back Program

Prelude Solutions demonstrates its commitment to supporting women-owned businesses by donating a percentage of savings back to WBENC from their WBE and WBENC Corporate clients. This initiative aligns with our mission to empower women entrepreneurs and foster diversity in business.



Boards, Committees & Memberships

Prelude Solutions team members are deeply involved in serving on multiple boards, committees, and memberships that promote the greater good of their communities. From local charities to industry associations, Prelude team members dedicate their time and expertise to initiatives that make a positive impact. This commitment to community involvement reflects Prelude's core values and its team member's passion for giving back and making a difference in the world around them.



Environmental Impact

At Prelude Solutions, sustainability is a core principle, not a checkbox. In 2024, we continued to prioritize working with suppliers who share our commitment to responsible, ethical, and environmentally conscious business practices.

We actively seek partners who demonstrate measurable efforts to reduce environmental impact, uphold ethical labor standards, and operate with transparency. Our selection process includes open dialogue to ensure their practices align with our values and long-term sustainability goals.

This collaborative approach strengthens our supplier relationships and amplifies our collective impact. By embedding sustainability into both our partnerships and internal operations, Prelude is committed to leading by example and driving meaningful change across the industry.



Supports local vendors to cut shipping emissions



Goes paperless with digital workflows and e-signatures



Carpooling or using public transportation for all events



Prioritizes virtual meetings over travel



Educates clients on tech solutions that cut energy use



Chooses eco-conscious event giveaways



Diversity, Equity & Inclusion

At Prelude Solutions, building an inclusive, equitable, and empowering workplace is central to who we are. We recognize that diversity, in background, perspective, and experience, not only enriches our culture but also drives innovation and deeper understanding in everything we do.

We foster a workplace where every team member feels heard, valued, and supported in their growth. This includes listening actively, promoting equity, and implementing initiatives that champion belonging at all levels of the organization.

Our commitment extends beyond our own team. We proudly partner with diverse suppliers and seek out organizations that align with our values, helping to build a more inclusive and equitable business ecosystem.

By embracing our differences and cultivating a culture of openness and respect, we aim to create a stronger, more resilient organization that reflects the world we serve.



Our Focus For 2025

2024 was a transformative year for Prelude Solutions, a time to retool, reflect, and reimagine the future of our business. Through strategic realignment and continued innovation, we uncovered new opportunities, deepened our impact, and opened up pathways that will define our growth for years to come.

In 2025, our focus is clear: continue evolving as trusted advocates for our clients and partners while driving meaningful change across our industry and communities. We remain unwavering in our commitment to diversity, equity, and inclusion (DEI), sustainability, and responsible innovation. These principles aren't just part of our values, they guide every decision we make.

We'll continue to expand the Prelude Cares Network (PCN) to amplify our impact, helping our clients save on technology costs while reinvesting in the nonprofits that strengthen our communities. As we grow, so does our ability to connect business success with social good.

At the same time, we're empowering companies through digital transformation, streamlining operations, optimizing tech infrastructure, and reducing waste. By helping clients modernize and operate more efficiently, we're not only cutting costs but also contributing to a smarter, greener planet. 2025 is about taking everything we've learned and turning it into action, deepening relationships, scaling impact, and building a future where innovation and purpose go hand in hand.



Thank you!



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