# WORKFORCE CONSULTANTS

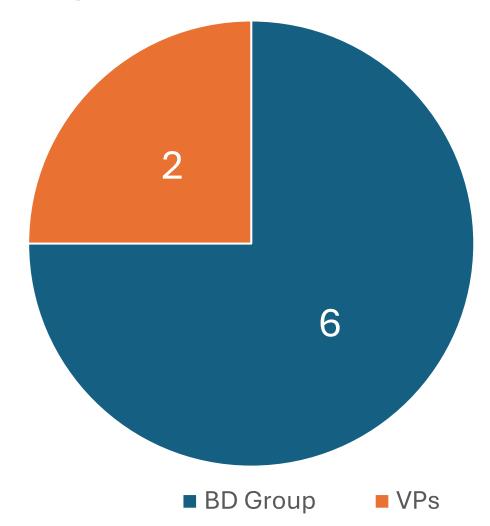


- January 2025 Meeting Recap
- Business Development
- Client Growth
- Required Team Focus

# Business Development Goals

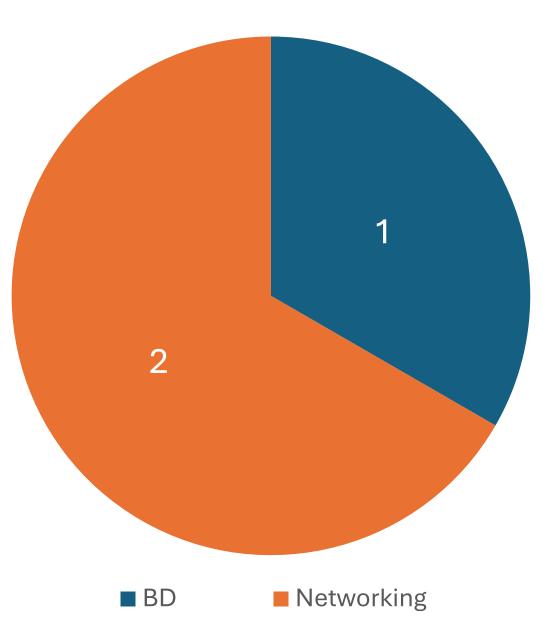
Professional Networking and Referrals from our Specialty Partners are essential avenues for new client opportunities!

## BD Targets Per Month – New Clients



Actual BD Results – December -January

## 62% Below Targeted Goal



## **New Clients**

- December 2024 Positive Energy
  - General & Electrical Contractor
  - Glendora, CA
  - Project SOW
  - No Minimum Service Period
  - EE Handbook
  - Policies/Guidelines
  - Primary Consultant Maria

# Positive Energy



- January 2025 E-Core Fitness
  - Fixed Rate SOW
  - Palm Springs, CA
  - Initial Focus on the Employment Infrastructure
  - Primary Consultant Maria



- January 2025 The Happier Life Project
  - Recovery Community Organization
  - Lake Elsinore, CA
  - Project SOW
  - HRIS Implementation Development of Best Payroll Practices
  - Primary Consultant Rachel



# **Client Growth**



- DIG Corporation
  - Residential and Commercial Drip Irrigation Systems
  - Vista, CA
  - Initially started with Project SOW – September 2024
  - New Fixed Rate 28 hours/mo as of December 2024
  - Primary Consultant Maria

- Hemington Landscape Services
  - Commercial Landscape and Concrete Services
  - Cameron Park, CA
  - Initially Retained Services account 25 hrs/mo – June 2024
  - NEW Managed Services –on-site account - 100/hrs/mo – January 2025
  - Primary consultant Rachel
  - Actively recruiting for on-site support



# **Client Loss**

- Cal-Coast Irrigation
- Initially engaged services Flex Services – March 2021
- Changed to subscription Service
- Primary Consultant Lucien
- Notified 1/30 business is closing

Cal-Coast Irrigation, In

## Why Do We Lose Clients

Client's business has changed

#### Dissatisfaction with our Services

Client decides to hire internal HR team Defined Projects have been completed

# How Can YOU Help?

Exceed	Learn	Inform	Familiarize	Increase
Exceed client's expectations and communicate effectively with critical client contracts	Learn the business and listen to opportunities where we may be able to assist	Inform Workforce Leadership of any significant client changes	Familiarize yourself with our specialty programs • Payroll processing services • Leadership Academy • Performance Management	Increase your knowledge in the following high -risk areas for employers • Wage & Hour • Leave of Absence Management • Accommodations

## Become invaluable to your clients!