

Hello Partners!

As you may know, I am making my way through the partnership listening to each partner's view on where OI is as an organization, what we are doing right for the partners and finally what areas can be improved upon. The key area identified has been communication from the board. In an effort to keep the partners better informed, we will be distributing a synopsis after each board meeting. Because we also know that there may be questions, we will host a call after each board meeting as well so that we can answer any questions and get feedback in a timely manner. Please keep your eye out for an upcoming invitation to join that call.

Our last board meeting was held last Thursday the 23<sup>rd</sup>. Areas of discussion included the following:

#### **OIP Financial Report**

Cash of \$64K as of 6/30/15 vs \$55K at 12/31/14

Net Income YTD of \$-2K at 6/30/15 vs -\$28K at 5/31/14

Leading OI Referring firms at 6/30/15

- |                                  |        |
|----------------------------------|--------|
| 1. Hugh Anderson Associates      | \$ 73K |
| 2. Career Consultants            | \$ 69K |
| 3. Cunis & Gontin                | \$ 51K |
| 4. High Potential Inc            | \$ 34K |
| 5. Innovative Career Consultants | \$ 29K |

#### **New Partner Selection**

Jim Wilson reviewed the current partner selection power point presentation and found the information outdated. Jim updated the information and asked board members to review and offer any suggestions. Jim is in conversations with a potential firm in the Atlanta market. Steve suggested using Claudia's video for an introduction to OIGP. There has been work accomplished to improve the presentation since the board meeting was held. Currently Mike Farrell and Jim Wilson are leading the efforts surrounding New Partner Selection. If you would like to participate on this or any other committee, please contact Sharon @ [sbarkmeier@oiglobalpartners.com](mailto:sbarkmeier@oiglobalpartners.com).

#### **Operations/Quality**

Lyell asked the board if there is any interest in creating an internal certification for career transition and perhaps later to coaching. LHH, CPI, Right and DBM have similar programs. Having the certification is helpful in delivery, consultants and potential customers. The idea would be to have some training, a consultant delivery manual, online test and certification. Tom suggested sending his career coaching materials to use as a benchmark for training.

Next step is to send communication to partners to ask what they are doing in regard to internal certification. Do partners have internal professional development programs?

#### **Operations/Technology report**

Claudia reported that she is working half time in July and August which will reduce her cost to OI as well. Work continues with OI Solutions on updates, usage statistics, set up of new accounts and updating the OIGP.com website. Claudia will continue to facilitate the weekly blogs through July.

#### **Partner Stock Purchase**

Per the recently signed commitment documents, all partners are required to own 2 shares of stock. All but one firm have agreed to complete their purchase.

#### **OIGP Holding Company**

The vote for stockholders, partners and board members were distributed and currently 3 votes are needed for completion. CNI continues to work on their votes. Hopefully, all will be complete by the CNI meeting in Berlin in September.

**Marketing/Branding report**

Tom announced the appointment of Chris Medici from Chicago, as the new Director of Marketing. Tasks include blog responsibilities including scheduling, coordinating, editing, emailing partners weekly and posting to the web site. He will also post to social media, including Twitter, Facebook, and LinkedIn. Chris will begin research on creating a press release sometime over the next few months, with a target of 3 per year.

Meeting Adjourned: 4:57 pm ET

Please do not hesitate to contact me or any board member should you have questions regarding this recap. Thank you for your partnership, it is GREATLY appreciated.

Susan

Susan Ruhl  
Chair