

OI Partners, Inc.
Partner Meeting Minutes
Chicago, IL
September 23 & 24, 2015

Recap:

Update from Board and Q&A

OI provided an update from the previous board meeting. The board provided quick updates on each area covered.

Using OI Solutions to Drive Business

Tony Heard and Hilmi Sunay, Abintegro gave a presentation about their direction and products they intend to provide to the market going forward. There are several initiatives underway that will allow OI to provide better service to their clients and candidates as well as new products that could mean expanded business with current clients.

ECareer Center Training

There was a small amount of time spent guiding those firms who would like additional training on how best to use OI Solutions to provide better service to their candidates.

OI – Adding Value

In light of reduced referrals, there was a discussion about how best OI can provide additional services to the partnership to enhance value received from being a partner. Some of the ideas included:

- Errors & Omissions Insurance
- Corporate program for Assessments MBTI, DISC, Campbell, Strong, Hogan
- Corporate program with Regus for Office Space
- Corporate program for business valuations
- Fedex or UPS corporate program
- Go to Meeting corporate program
- Office Supplies
- Establish a relationship with a business broker for those partners looking to sell or buy
- Corporate payroll plan

Lincolshire Update

There was a brief discussion about the potential merger with Lincolshire. While there is overlap in certain cities, there was no opposition to the conversation with Lincolshire.

Succession Planning

Neil Posner provided a great legal overview (thanks to Mike Farrell) of what firms should consider when preparing to transition their firms.

There was also a healthy discussion by all of the partners as to how to evaluate their firms, how OI can help them find successors or potential partners.

Marketing

Chris Medici provided an overview of his new role as PR.

Other Services

There was a general discussion as to what makes up other services provided by OI Partner firms. When reviewing the consolidated financial statements there is a large amount of business that is classified as “Other”.

Partner Success Stories

Jim Wilson shared how he secured a global contract with AMEX Global Travel. Several other firms shared how they are selling “outside the box”.