

The cover features a white background with several large, overlapping semi-circular shapes in blue, green, dark blue, orange, and red. The text 'ANNUAL REPORT' is centered in a dark blue, sans-serif font.

# **ANNUAL REPORT**

# ABOUT US

## Purpose/Vision

Inspiring potential through learning, technology, and leadership.

## Objective

Create awesome opportunities with explosive growth, championing efficiency, and wowing clients and prospects.

## 2022 Main Product Focus: Subscriptions

CDA Training/Bulk CDA  
Training Bundles  
New Courses  
Client Courses  
Individual Courses/Packages



## Brand Archetype: The Caregiver



Overview: Service, Stability, Control  
Brand Promise: Empathy/Support  
Brand Motto: "How can we support you?"  
Brand Voice: Caring, Warm, Reassuring, Helpful

# EXECUTIVE SUMMARY

## Our Target Market

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We have multiple target markets at ProSolutions Training. Our primary user and individual course buyer is Tiffany Teacher. Our primary buyers for group training are Dana Director, Evie Enterprise, Frank Franchise, and Susie State.

## Our Products

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At ProSolutions Training, we also offer multiple products although all center around a core of online professional development courses and a variety of ways to deliver the courses.

## Our Solutions

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Online professional development is available as:

- Individual training courses (1 and 2 hours)
- Course bundles (topic-driven bundles at a discount)
- Course packages (package level certificate)
- Individual subscription
- CDA Training (120 hours for the Child Development Associate Credential)
- CDA Renewal (45 hours for the Child Development Associate Credential Renewal)
- Basic Group Subscription
- Enterprise Subscription
- State Contracts
- Course Hosting
- Affiliate Programs (resellers)

# MARKETING

## AT A GLANCE

Of the eleven major goals assigned in 2022, all were exceeded. There was one that we did not establish a baseline for, but we are confident that it was met if not exceeded. In general, the total daily sales report showed a 30% growth from 2021.

## CHALLENGES

Our challenge was to create movement in every level of the sales funnel. The full lifecycle of the customers is important in increasing customer lifetime value (CLV) and increasing revenue, while maintaining a positive customer experience.

## SOLUTIONS

We created goals for every level of the sales funnel so that we could monitor optimization of each.

### Key metrics

572 Total tasks were created in the 2022 Marketing Operations Airtable. Of those 32 were cancelled, 48 are on hold, and 4 are still in progress. 449 projects were on track for the year.



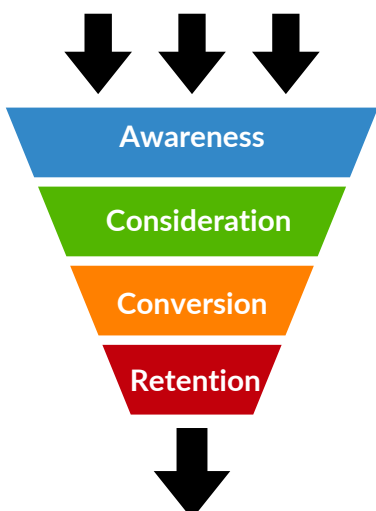
**488**

Total Tasks Completed



**29**

Major Projects Completed



## AWARENESS

Objective	Goal	Final	Status
Increase visits to website	15%	17%	Exceeded
Increase director leads		88.1K	No Baseline Established
Optimize Reseller Program		Only 5 portals left	Met
Increase Leads by 1000 per month	+12K (239K base)	+430K (669K final)	Exceeded
Conference participation & sponsorship	12	30	Exceeded

# MARKETING GOALS

## CONSIDERATION

Objective	Goal	Final	Status
Upsell course bundles	\$36K	\$61K	Exceeded
Increase leads via pop-ups	12K	59K	Exceeded
Increase sales of bulk CDA Training	20% (Base \$136K)	69% (Final \$230K)	Exceeded

## CONVERSION

Objective	Goal	Final	Status
Increase Subscription Sales (all size)	15%	19%	Exceeded
Create email nurture content	60	100	Exceeded

## RETENTION

Objective	Goal	Final	Status
Increase Subscription Renewals	10% (Base \$390K)	17% (Final \$457K)	Exceeded

## INTERNAL ALIGNMENT

- Created PST 1-2-3 internal email
- Start creating a budget for PST and involving other teams
- Worked with Instructional Design as Subject Matter Experts for monthly topics
- Attended management and planning meetings
- Helped plan holiday party for company
- Hired and managed external consultant to help with company impact

# COURSE DEVELOPMENT

## 2021 CARRYOVER

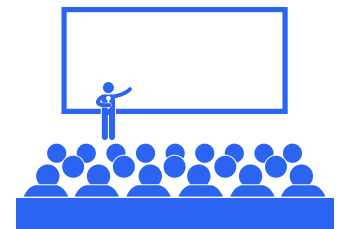
**12** Courses Developed



5 Newsletters

## 2022 PST NEW DEVELOPMENT

**14** Courses Developed



2 Presentations

## EXISTING COURSE UPDATES

**36** Courses Updates

## Overview

Course development focuses on both ProSolutions Training's proprietary courses, as well as client course development. It's a balance to make sure both are completed in a timely manner.

**200+**  
Total  
Courses

## CLIENT - COURSE CUSTOMIZATION

**17** Courses Customized

## CLIENT - NEW COURSES

**8** Courses Developed

## CLIENT - IN PROGRESS

**21** Courses

# STATE APPROVAL DATA

## FORMAL ACCEPATANCE

**38** States



13 States Accept  
Training for IACET Standing

## ORGANIZATIONAL APPROVAL

**7** States



23 States Have  
Submission Process

## DATA API REGISTRY TRANSFER

**11** States

# REGISTRY REQUIREMENTS

28 English, 23 Spanish  
Number of (new development) courses

754  
Individual course submissions

1,656  
Individual course/event renewals

257  
Individual courses submitted with new competencies

3440  
Individual courses/events updated with new pricing

12  
Quarterly reports submitted

### Differentiator

The primary reason people take professional development training with ProSolutions Training is to meet state requirements for licensing. It's a big job to make sure our course stay in compliance with state registries.

# IT DEVELOPMENT

## HIGHLIGHTS FROM 2022

- Hired new developer
- Implemented 508 Overlay tool
- Launched Master Product List (MPL). (Over 900 development hours, not including planning, testing, and meetings!)
- Updated Course Pricing - \$10 to \$14 (1-hour) and \$18 to \$24 (2-hour)
- Implemented SSRS Report Import Interface
- Completed automation of scheduled reports FTP process

## PST ADMIN ENHANCEMENTS AND TOOLS

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Added PST Admin enhancements and tools, including:

- Limiting Product Versions listed in Customer Order screen
- Redirecting inactive Content pages
- Creating User accounts in PST Admin
- Configuring auto-emails
- Displaying the last date a customer's registry profile was updated
- Toggles for Sponsor Portals
- Displaying the last a customer updated his/her date profile on the Customer Admin screen
- Removing orphan subscription records when user is tied to more than one subscription
- PST Admin can toggle state-required fields for a user's profile



# IT DEVELOPMENT

## BY THE NUMBERS

### BUNDLES/PACKAGES

**20** Created/Updated

### REPORTS

**200** Created/Modified

### CLIENT RELATIONS

**700** Requests

### PST REQUESTS

**163** Resolved including 26 bugs

### CLIENT REQUESTS

**41** Resolved



### JIRA TICKETS

Month	Created	Resolved
January	46	9
February	29	13
March	36	16
April	22	17
May	26	16
June	14	22
July	16	6
August	11	4
September	37	11
October	34	18
November	23	44
December	31	25
TOTAL	325	204