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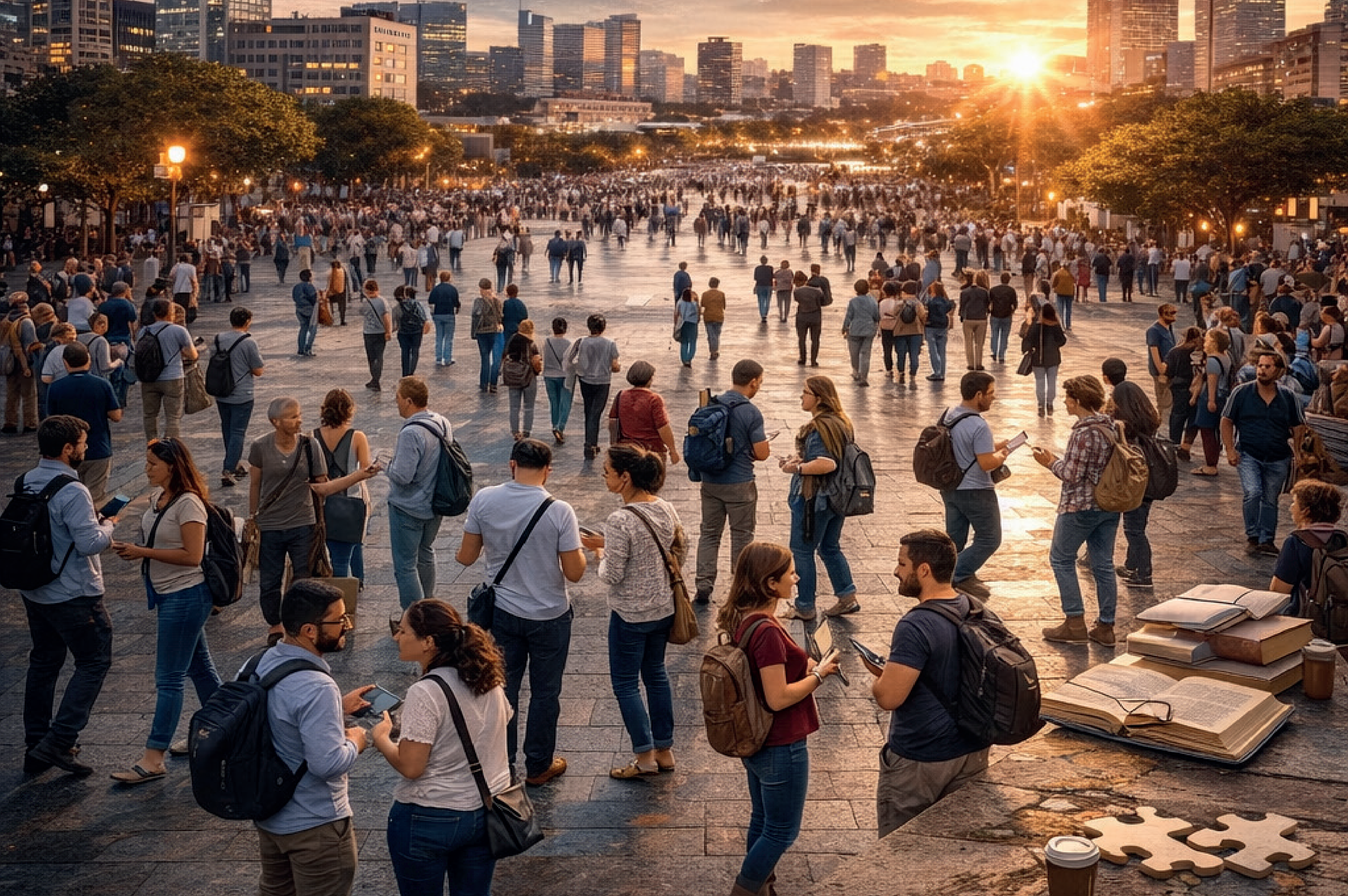

Edited by

Flávia Moreno Alves de Souza

Periodicois

Graphic Design, Layout and Cover

Academic Publisher Periodicojs

Language

Portuguese and English

International Cataloging-in-Publication Data (CIP)

(Brazilian Book Chamber, SP, Brazil)

C761 Contemporary Perspectives of Knowledge: Interdisciplinary Approaches/ Flávia Moreno Alves de Souza (org) – João Pessoa: Periodicojs publisher, 2026.

E-book: il. color.

Includes bibliography
ISBN: 978-65-6010-196-8

1. Free themes. I. Souza, Flávia Moreno Alves. II. Title

CDD 370

Prepared by Dayse de França Barbosa CRB 15-553

Index for systematic catalog:

Indexes for systematic catalog:

1. Education: 370

Work without funding from public or private bodies.

The published works have been submitted to peer review and evaluation (double-blind), with respective acceptance letters in the publisher's system.

The work is the result of studies and research from the Interdisciplinary Studies in Human Sciences section of the Humanities in Perspective book collection.

Filipe Lins dos Santos
President and Senior Editor of Periodicojs

CNPJ: 39.865.437/0001-23

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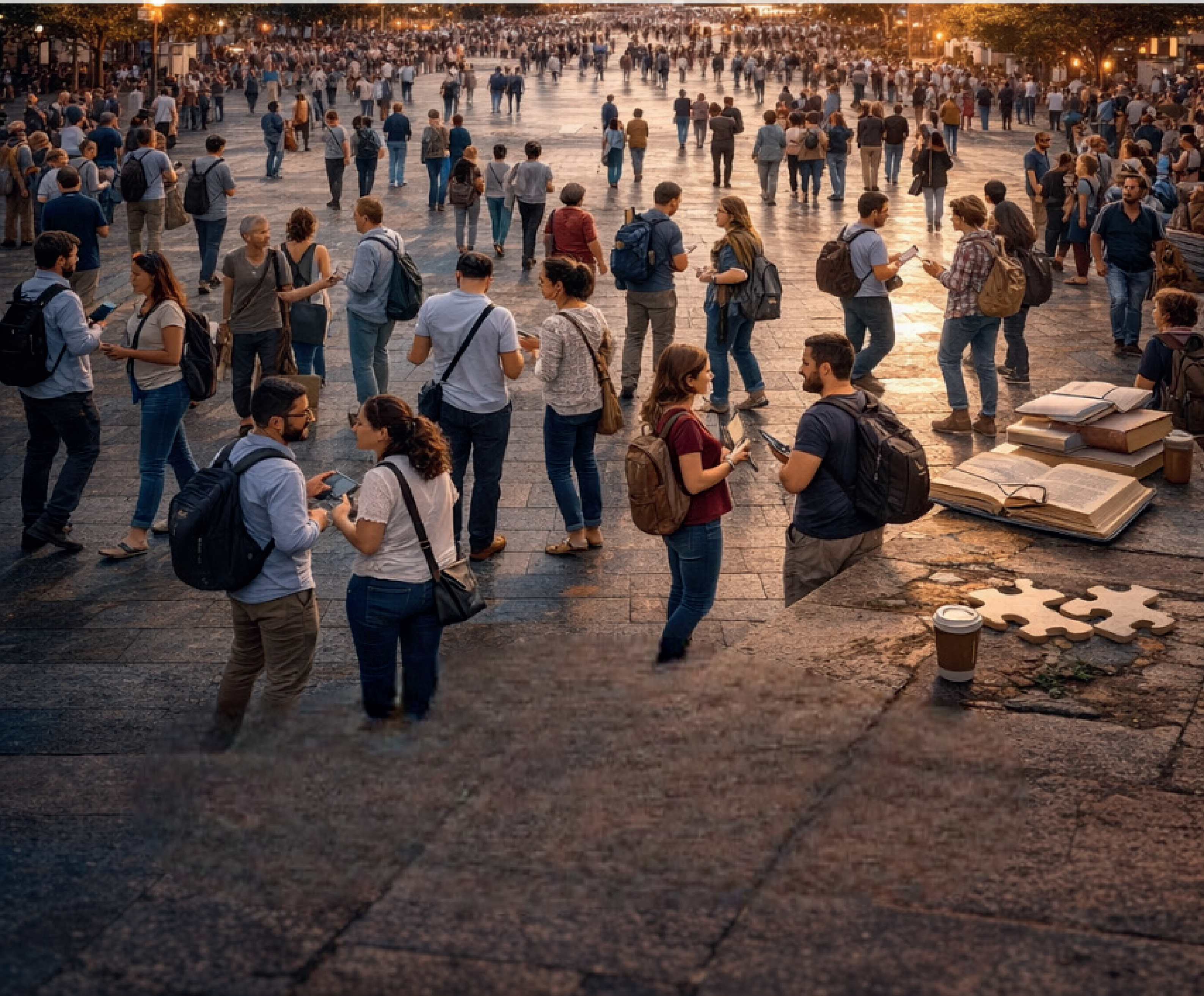
Chapter 25

RECONCILING PROFESSIONAL PRACTICE, NAMED METHODOLOGY AND FINANCIAL PROJECTION IN AN SME HUMAN-CAPITAL CONSULTANCY: A TECHNICAL AND BUSINESS REPORT ON PCRM AND CLIMATELENS



RECONCILING PROFESSIONAL PRACTICE, NAMED METHODOLOGY AND FINANCIAL PROJECTION IN AN SME HUMAN-CAPITAL CONSULTANCY: A TECHNICAL AND BUSINESS REPORT ON PCRM AND CLIMATELENS

Cristine Correa[1]

Abstract: This technical report reconciles six controlling source documents — the Professional Methodology Dossier, the Professional Declaration of Intentions Dossier, the ClimateLens Platform Documentation & Evidence Dossier, the Five-Year Financial Model, the Strategic & Financial Business Plan, and the EB-2 NIW Professional Resume — to evaluate the professional formation, named methodology, and business proposal of Cristine Correa and Correa Workforce Sciences, LLC. The founder's practice is formalized as PCRM (Psychometric Climate & Retention Methodology), a four-stage, five-step organizational framework operationalized through a supervised delivery layer, ClimateLens, that remains pre-launch and pre-revenue at the time of writing. Drawing on a six-employer chronology (2011–2022) documented by signed employment letters and seven independent third-party validators, the report reports historically observed outcomes — including a 25–35% reduction in climate-target shortfalls at a multi-campus employer, an approximately 15–20% reduction in 90-day exits in monitored retail cycles, and candidate/leader Net Promoter Scores near 9.8 and 9.6, respectively — alongside a five-year financial model projecting cumulative gross revenue of approximately US$6.79 million and a net present value near US$663,723 at a 12% discount rate. Market framing is anchored to U.S. Bureau of Labor Statistics, Small Business Administration, and Gallup public data rather than a single, previously unsourced national estimate. The report concludes that the reconciled evidentiary record is credible and internally consistent, while explicitly flagging the pre-revenue status of ClimateLens, the provisional (non-individually-predictive) nature of its

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30/60/90-day retention-review horizons, and the modeled — as opposed to realized — status of all financial projections.

Keywords: employee retention; organizational climate; psychometric assessment; human resources analytics; small and medium enterprises; workforce turnover; business plan validation

Introduction

Talent management in the United States small- and medium-enterprise (SME) market requires both specialized technical expertise and a business narrative anchored to verifiable evidence. The present report updates an earlier Enhanced Technical Report (Correa, 2026a) by integrating six August-2026 control sources: the Professional Methodology Dossier (Correa, 2026c), the Professional Declaration of Intentions Dossier (Correa, 2026b), the ClimateLens Platform Documentation & Evidence Dossier (Correa, 2026d), the Five-Year Financial Model (Correa Workforce Sciences, LLC, 2026a), the Strategic & Financial Business Plan (Correa Workforce Sciences, LLC, 2026b), and the EB-2 NIW Professional Resume (Correa, 2026e). Together, these sources establish a single evidentiary chain spanning professional history, methodology, product status, market logic, operating capacity, and financial projection.

Where sources diverge, a defined evidentiary hierarchy applies: signed employment and credential records govern professional chronology; the platform dossier governs product status, data boundaries, and predictive disclaimers; the Five-Year Financial Model governs quantitative projections; and the Business Plan explains the underlying market and operating assumptions. The remainder of the report is organized around (a) professional formation and third-party validation, (b) the PCRM methodological architecture, (c) the service portfolio, (d) market and economic context, (e) the business model and five-year financial projections, (f) historically documented results, and (g) conclusions and recommendations.

Note on Source Reconciliation

This version reconciles the prior August 2026 report against the six control sources listed above. Reconciliation corrected the American Management Association (AMA) membership date, confirmed the pre-launch and pre-revenue status of the ClimateLens platform, distinguished provisional retention-review horizons from validated individual forecasts, reconciled the subscription-versus-services revenue mix, and incorporated the financial model's complete profitability and investment indicators. Table 1 summarizes the principal corrections.

Element	Prior Report	Reconciled Position (This Report)
Employment chronology	CDL Joinville and Precisão Global merged into one undated 2013 entry	Six distinct employers with signed-letter-grade date ranges (Section 2.2)
U.S. professional membership	Not documented	AMA membership, ID 4016170, held since 12 May 2023
U.S. arrival and residence	Not documented	Arrival July 2022; residence in Sanford, Seminole County, FL
Five-year revenue path	Year 1 and cumulative total only	Full Year 1–5 path plus five-year NPV (Section 6.1)
Illustrative client economics	Not modeled	100-FTE planning illustration; explicitly not a guarantee (Section 5.3)
National/state market anchors	BLS JOLTS and BLS OOH only	Adds SBA counts and a Gallup-cited national turnover-cost estimate (Section 5.1)
Platform status	Not stated	Explicitly pre-launch, pre-revenue; interface data are synthetic demonstrations
Predictive/psychometric qualification	Predictive language used without a validation boundary	PCRM's name does not imply completed formal psychometric validation; 30/60/90-day horizons are provisional, aggregate, management-review windows

Table 1. Principal reconciliations between the prior report and the current, six-source version. A complete element-by-element comparison is retained in the source dossiers.

Professional Formation and Expertise

Academic Foundation and Certifications

The founder's qualification rests on a documented academic and regulatory foundation. Cristine Correa holds a Bachelor of Psychology from Associação Catarinense de Ensino / Faculdade Guilherme Guimbala (completed 3 March 2012; 4,212 class hours) and a Lato Sensu specialization in Psychological Assessment from the same institution (completed 27 October 2013; 368 class hours). An MBA in People Management, Managerial Development and Coaching was completed at FACEL on 31 May 2017, with the diploma on file. Professional psychology registration is held under CRP-12/11050, establishing a regulated background, although current U.S. practice remains organizational rather than clinical in scope.

Applied behavioral assessment methods training was completed at Ânima on 20 April 2020, underpinning role-requirement mapping through behavioral and cognitive metrics. American Management Association (AMA) membership (ID 4016170) has been held since 12 May 2023, supporting ongoing alignment with U.S. management and human-resources practice standards. Additional platform and compliance certificates on file include Gupy, Kenoby, PCI DSS, PLD/FT (anti-money-laundering/counter-financing-of-terrorism), and Accessible Digital Communication.

Note. The Predictive Index (PI) Analyst certification (PRAENDEX Brazil, April 2018), cited in the January 2026 report, does not appear among the credentials documented in either the Methodology Dossier or the Declaration of Intentions Dossier. It is omitted from this report pending a supporting source document and should be reinstated only if the corresponding certificate is supplied.

2.2 Professional History: Employment Chronology

The Declaration of Intentions Dossier (Correa, 2026b) supplies a canonical employment record with signed-letter-grade dates, correcting a previous version's merged entry for CDL Joinville and Precisão Global de Cobranças, which had appeared as a single undated 2013 line. Table 2 presents the corrected chronology, mapped to its contribution toward the PCRM methodology described in Section 3.

Period	Organization	Role / Context	Contribution to PCRM
Sep 2011–Jul 2014	Contax Mobitel S.A.	HR Assistant; Vivo contact--center hiring (Joinville)	First psychologist structuring the recruitment & selection cell; 100–300 monthly admissions; instrument and funnel-indicator design under high volume
Aug 2014–Feb 2015	Precisão Global de Cobranças EIRELI	Recruitment & Selection Analyst	Multi-employer selection and HR consulting support; psychological tests and technical reports for associated employers
Apr 2015–Nov 2015	CDL Joinville	Recruitment & Selection Assistant	Collective and individual selection support; culture visits and instrument redesign for associated companies
Feb 2016–Sep 2017	Walmart / WMS Supermercados do Brasil	Recruiting & Selection Analyst Jr., four Joinville units plus Curitiba support	2–3-day average vacancy closure; ~300 annual openings; ~15–20% reduction in 90-day exits in monitored cycles; 2016 institutional innovation recognition (5W2H)
Sep 2017–Aug 2021	UniSociesc / Ânima	HR Analyst / multi-campus Business Partner (~1,600 employees)	GPTW-aligned climate recovery; Assisted Feedback quality control; 25–35% fewer units below climate target; 600+ annual hires in served units; >100 leaders trained; PCD (disability) inclusion
Aug 2021–May 2022	Asaas	Talent Acquisition Analyst, fintech	End-to-end Gupy ownership; candidate NPS ~9.8, leader NPS ~9.6; 45-day post-hire effectiveness checks; ~84 Q1 2022 admissions

Table 2. Employment chronology and documented contribution to PCRM, 2011–2022.

Note. Dates reported in the January 2026 report (e.g., Contax 2008–2011; Walmart 2013–2015) are superseded by the signed employer-letter dates in Table 2, independently confirmed by both founder dossiers. If earlier dates reflect additional, undocumented experience, this should be separately clarified and evidenced rather than merged into the PCRM case record.

A U.S. preparation phase followed: Cristine Correa arrived in the United States in July 2022 and has resided in Sanford, Seminole County, Florida — the same corridor selected as the Correa Workforce Sciences headquarters. AMA membership was established on 12 May 2023. Correa Workforce Sciences, LLC was defined as the operating vehicle during 2024–2026, with the Business Plan and ClimateLens product definition finalized in 2026, fixing the Sanford headquarters, four priority verticals, service lines, and the five-year financial trajectory detailed in Sections 5 and 6.

Third-Party Validation

Both founder dossiers add named, dated, independent validators who directly observed the practice that became PCRM. The Declaration of Intentions Dossier organizes these as an "Authority Anchors" set alongside signed employment-verification letters (Table 3).

Validator / Source	Type / Relationship	What Was Validated
UniSociesc HR, functional declaration (24 Jun 2026)	Employment verification	HR Analyst role, 12 Sep 2017–15 Aug 2021; multi-unit business-partner scope; ~1,600 people; 600+ annual hires
Walmart (WMS), professional activity declaration (25 Jun 2026)	Employment verification	R&S Analyst Jr., 1 Feb 2016–8 Sep 2017; four Joinville units; 2–3-day fill; ~300 vacancies/year
Bianka Fernanda dos Santos, Asaas Tech Recruiter (9 May 2026)	Peer technical note	Strategic vacancies, end-to-end Gupy operation, candidate-experience rigor in high-volume fintech hiring
Renata Santos de Araújo (6 May 2026)	Manager impact report	Direct supervision at Walmart; interim leadership of the full state recruiting cell; ~15–20% early-exit reduction
Daniel Gouveia Tanigushi (13 May 2026)	Executive technical opinion	Direct management relationship, 2018–2020, at UniSociesc; climate, occupational health, and people-strategy appraisal
Franciele Pereira Zazycki (29 Apr 2026)	Comparative competence analysis	Benchmark against large-enterprise organizational-development standards, from a former Ânima regional people leader

Ana Luiza Baldini (24 Apr 2026)	Peer testimony (Methodology Dossier)	Psychologist colleague at Contax (2012); founding of the selection methodology under high-volume load

Table 3. Independent third-party validators cited in the founder dossiers.

Note. The Declaration of Intentions Dossier's own Authority Anchors table does not separately itemize the Ana Luiza Baldini testimony, though it remains part of the broader documentary record established in the Methodology Dossier and is retained here for continuity.

PCRM: The Named Methodological Architecture

Earlier reporting described three unnamed technical pillars. Both subsequent founder dossiers supersede this description with a named, four-stage system — PCRM, or Psychometric Climate & Retention Methodology — together with a defined delivery layer and, per the Declaration of Intentions Dossier, an explicit five-step engagement sequence (Table 4).

Stage	What It Does	Documented Origin
P — Psychometric Design	Instrument items, construct definitions, and cutoffs calibrated by vertical and employer size; the Climate Diagnostic uses ~27 items across five climate domains in a ~6-minute response window	Psychology degree (2012); Psychological Assessment specialization (2013); Ânima behavioral assessment training (2020)
C — Climate Capture	Annual and pulse listening cycles convert sentiment, leadership forums, and assisted feedback into local action maps	GPTW-aligned cycles and leader forums at UniSociesc/Ânima; Tanigushi technical letter, 13 May 2026
R — Retention Analytics	Flight-risk signals decomposed at unit level across 30-, 60-, and 90-day horizons, connecting climate drivers to early-exit patterns	Walmart 90-day exit analysis; Asaas 45-day NPS; Contax funnel/rotation tracking
M — Managed Intervention	Manager-owned actions on an Intervention Board with owner, deadline, and micro-metric; quality closes only after founder review of calibration, thresholds, and delivery	Assisted Feedback program; PCD inclusion execution; Intervention Board design in ClimateLens

Table 4. The four stages of PCRM.

PCRM Engagement Sequence

The Declaration of Intentions Dossier specifies a five-step engagement sequence that operationalizes the four PCRM stages from initial scoping through renewal:

Scope — define client unit, role groups, people pain, available data, and leadership responsibilities before any instrument is fielded.

Measure — collect climate, role, retention, and manager-practice signals through structured instruments and interviews adapted to sector and size.

Interpret — read data against behavioral evidence and job context under principal review, separating symptoms from root causes before naming priorities.

Intervene — install manager routines, communication changes, workload adjustments, and follow-up micro-metrics with named owners.

Review — monitor results within a 30–90-day window, correct drift, and recalibrate the next cycle under continuous technical supervision.

The Five Climate Domains

- Psychological safety — voice, error reporting, and freedom from fear of retaliation.
- Workload and capacity — overload, recovery, and staffing pressure.
- Leadership quality — clarity, fairness, and feedback cadence.
- Procedural justice — perceived fairness of decisions and processes.
- Meaning and growth — purpose and development opportunity.

ClimateLens Product Architecture

ClimateLens is the proposed supervised delivery layer of Correa Workforce Sciences, LLC. It operationalizes PCRM through digital workflows while keeping interpretation under continuous technical direction. At the time of writing, the LLC has not been constituted, ClimateLens is pre-launch and pre-revenue, there are no paying clients, and no U.S. diagnostic cycle has been sold or delivered; interface scores, employer names, alerts, and dashboards shown in platform materials are synthetic demonstration data. The PCRM name does not imply completed formal psychometric validation.

Intake & Segmentation — sector, size band, locations, workforce groups, turnover history, leadership structure, and available HR data.

Psychometric Diagnostic — annual full surveys, shorter pulse cycles, and optional qualitative prompts mapped to the five climate domains.

Proposed Retention Review — aggregate unit, team, function, tenure-band, and leadership-pattern indicators organized across 30-, 60-, and 90-day management horizons. At launch these are provisional review windows, not validated forecasts of individual departures; thresholds and weights may be refined only after sufficient participating-employer data and documented empirical evaluation.

Intervention Layer — manager scripts, debrief routines, recognition cadences, workload checkpoints, psychological-safety practices, and micro-metrics.

ClimateLens Subscription — a recurring cadence of pulses, monthly review meetings, benchmark tracking, and recalibrated recommendations (US$990/month).

Technical Stack — cloud survey tools, analytics exports, and API-ready links to systems already used by SMEs (e.g., BambooHR, Gusto, Rippling, Paychex, ADP RUN) as a complementary layer, not a replacement.

Service Portfolio

Service Line	Client Receives	PCRM Stage Ownership
Deep Climate Diagnostic	Instrument administration, unit maps, executive interpretation	P + C, with founder sign-off
Predictive Retention Analytics	30/60/90-day unit risk and driver decomposition	R, with founder threshold review
Supervised Behavioral Intervention	Intervention Board, scripts, micro--metrics, coaching	M, with implementation QA
Leadership Technical Development	Programs built from the client's own diagnostic drivers	M + C integration
ClimateLens Subscription	Pulses, dashboard, monthly office hours, longitudinal memory	Full cycle between deep engagements
Strategic Retention Program (12-month)	Diagnostics + analytics + protocols + quarterly principal review	Sequenced across all four stages, with quarterly founder-approved technical reports
Benchmarking / Pulse Packages	Sector and size references; intermediate listening	C + R support modules

Table 5. Service portfolio mapped to PCRM stage ownership.

Note. The four service categories described in the January 2026 report (Strategic Recruitment and Selection, Leadership Development, Organizational Diagnostics, Customized Strategic HR Projects) are retained conceptually but re-mapped above to PCRM's own stage-ownership language, and now include the 12-month strategic retention program named in the Declaration of Intentions Dossier.

Economic Context and Market Framing

Earlier reporting anchored national impact to the U.S. hospitality/tourism sector alone, citing turnover costs without a public source citation. The founder dossiers instead ground market framing in named, checkable public statistics and a narrower, more defensible geography, adding Small Business Administration (SBA) small-business counts and a Gallup-cited national turnover-cost estimate alongside the previously cited Bureau of Labor Statistics (BLS) series.

National and State Context

Marker	Value	Source
U.S. small businesses	36.2 million+	SBA Office of Advocacy small-business profile series
Florida small businesses	3.49 million	SBA Florida state profile, 2025 series
U.S. quits, June 2026	≈3.2 million (2.0% total non-farm rate)	BLS JOLTS, June 2026 release
Leisure & hospitality quits, May 2026	4.0% (elevated vs. total private)	BLS JOLTS sector series
HR Managers employment growth, 2024–2034	+5% (≈17,900 openings/year)	BLS Occupational Outlook Handbook
HR Specialists employment growth, 2024–2034	+6%	BLS Occupational Outlook Handbook
Avoidable voluntary turnover cost, U.S.	≈US$1 trillion	Gallup estimate cited in the Business Plan market chapter

Table 6. National and state market anchors (BLS- and SBA-sourced).

Priority and Adjacent Verticals: Sector Turnover Pressure

Vertical	Documented People Pressure	PCRM / ClimateLens Application
Healthcare SMEs (priority)	Burnout, shift pressure, care-quality risk, manager overload (≈20–23% turnover)	Psychological safety, workload clarity, early burnout signals, supervisor routines
Hospitality & food service (priority)	High quit rates (often cited 50–80%; BLS sector quits 4.0%, May 2026), scheduling friction, fast onboarding	Short-cycle pulses, manager scripts, rapid integration checkpoints
Advanced manufacturing (priority)	Skill retention, safety culture, supervisor communication (≈24–32% turnover)	Link role clarity and safety climate to frontline leadership metrics
Logistics & warehousing (priority)	Attendance patterns, workload peaks, shift turnover (≈49%)	Map risk by shift, role, and manager; focused interventions and follow-up metrics

Professional services SMEs (adjacent)	Growth stress, role ambiguity, leadership bottlenecks	Combine climate diagnosis with leadership calibration and accountability rhythms
Transportation & last-mile (adjacent)	Schedule volatility, crew churn, supervisor communication gaps	Short-cycle climate pulses, manager scripts, and retention analytics by crew and shift

Table 7. Priority and adjacent verticals and their documented turnover pressure.

Note. This reframing narrows an earlier, implicit claim of a single, nationwide hospitality total-addressable-market figure to a defensible, sector-by-sector view anchored in Sanford, Seminole County, and expanding across Central Florida's four priority verticals, with professional-services and transportation/last-mile employers treated as adjacent verticals rather than a first-cycle growth lever.

Illustrative Employer Economics (Modeled, Not a Guarantee)

The Declaration of Intentions Dossier includes a planning illustration of client-side economics, explicitly framed as a modeling sketch rather than a performance guarantee. For a representative 100-employee employer with 22% annual turnover and a US$50,000 median salary, replacement cost modeled at one year of salary implies approximately US$1.1 million in direct annual turnover cost. A conservative 25% reduction in that turnover band implies roughly US$275,000 in annual direct savings for the same employer profile. This order of magnitude is used in the Business Plan to justify diagnostic and subscription engagement pricing in the tens of thousands of dollars for employers that currently lack internal people-analytics capacity.

Policy and Institutional Alignment

Reference Framework	Relevant Domain	How the Practice Engages It
U.S. Surgeon General workplace well-being framework	Protection from harm, connection, work-life harmony, mattering, growth	Climate constructs and manager protocols map to these operational domains
NIOSH psychosocial hazard guidance	Work design, organization, and management conditions linked to strain	Interventions target work-system and manager routines, not individual blame
OSHA workplace-stress guidance	Safe communication, checklists, stress conversations, employer response	Manager scripts and psychological-safety practices support employer response capacity
SBA small-business employment structure	SMEs as majority of firms and a large share of private employment	Product and pricing sized for employers without enterprise people-analytics teams
BLS JOLTS sector differentiation	Quit rates differ materially across hospitality, manufacturing, healthcare, logistics	Sector-specific interpretation replaces a single national turnover narrative

Table 8. Alignment with U.S. federal policy and institutional frameworks.

Business Model: PCRM and ClimateLens as Supervised Infrastructure

The commercial terms below follow the controlling Five-Year Financial Model and are interpreted through the Business Plan and the ClimateLens platform dossier. ClimateLens is a recurring, supervised delivery layer rather than a self-running SaaS substitute for founder judgment; founder-delivered diagnostics, retention analytics, intervention, benchmarking, and training remain the principal revenue engine. Pricing is set at US$165/hour for specialized technical engagements and US$990/month for the ClimateLens subscription, replacing an earlier flat US$1,500/month, fixed 12-week cycle model. No final client report or release is issued without founder calibration, threshold review, and sign-off — a 100% technical sign-off standard on diagnostics.

Five-Year Operating Projections

The Five-Year Financial Model supplies the controlling Year 1–Year 5 revenue path, revenue mix, annual profitability, discount rate, payback period, net present value (NPV), internal rate of return (IRR), return on investment (ROI), and business-value estimates. All figures in Table 9 are modeled projections rather than realized operating results.

Metric	Modeled Value
Year 0 capital	US$79,250
Year 1 gross revenue	US$441,461
Year 1 net result	–US$37,550 (controlled ramp year)
Year 2 gross revenue	US$1,154,459
Year 3 gross revenue (discounted payback year)	US$1,442,054
Year 4 gross revenue	US$1,737,848
Year 5 gross revenue	US$2,017,571
Cumulative five-year gross revenue	≈US$6.79 million
Five-year net present value (12% discount rate)	≈US$663,723
Headcount path	≈4 FTE (Year 1) → ≈8 head-office roles (Year 5, mature)
Technical hourly rate	US$165/hour
ClimateLens subscription price	US$990/month
Five-year revenue mix	ClimateLens subscriptions ≈US$677,568 (≈10%); founder-delivered services ≈US$6,115,824 (≈90%)
EBITDA path	US$9,704 (Y1) → US$788,416 (Y5); ≈US$2,021,075 cumulative including Year 0 investment treatment
Net income path	–US$37,550 (Y1); US$107,948 / US$268,511 / US$373,308 / US$461,872 (Y2–Y5)
Accumulated net income	≈US$1,094,840 across the modeled period
Discount rate / IRR / ROI	12% / ≈100.2% / ≈13.82×
Modeled business value	≈US$2,585,631, including the model's perpetuity logic
Break-even revenue	≈US$508,077 (Y1) and ≈US$856,722 (Y2); annual profitability turns positive in Y2

Table 9. Five-year operating and financial projections (modeled, not realized).

Note. This projection set replaces an earlier report's geographic client-count targets (15–25 in Florida, 40–60 in Texas, 100–150 in California) with the founder's own capacity-and-revenue model, which keeps expansion inside Central Florida and the Southeast — Sanford as headquarters and single quality center, with a remote national layer — rather than a three-state national rollout, at least in the current documentation.

Year-1 Launch Sequence

Setup — constitute Correa Workforce Sciences, LLC in Florida; finalize the instrument library, ClimateLens configuration, and data-governance templates.

Months 4–6 — close the first 2–4 diagnostic engagements in priority Central Florida verticals.

Months 7–9 — reach 5–7 active engagements; convert selected clients into ClimateLens subscriptions.

Months 10–12 — operate 6–9 active engagements; complete first annual review cycles and renewal discussions.

Year 2+ — expand remote multi-state share while keeping Sanford as the single quality center.

Under this geographic delivery architecture, all methodological calibration, instrument updates, and technical report approval remain at the Sanford quality center. Central Florida field delivery serves the Orlando–Tampa corridor and Seminole County market density, while cloud survey workflows, remote manager sessions, and founder-reviewed reports enable multi-state clients without physical branch expansion as the primary growth lever in the first operating cycle.

Results Obtained and Validation of Efficacy

Result	Organizational Context	Documented Value	Source
Climate unit recovery	UniSociesc (multi-campus)	25–35% fewer units below internal climate target; 600+ annual hires in served units	Tanigushi (2026); Zazycki (2026); UniSociesc functional declaration (2026)
Early-exit reduction	Walmart (retail, monitored cycles)	≈15–20% fewer 90-day exits; 2–3-day average vacancy closure; ~300 annual openings	Araújo (2026); Walmart employment verification letter (2026)
Assisted Feedback adherence	UniSociesc	>75% administrative adherence; >55% progressive teaching-leadership adherence; >100 leaders trained	Tanigushi (2026)
Candidate experience	Asaas (fintech)	Approved-candidate NPS ≈9.8; late-stage ≈9.2	Santos (2026); Asaas service declaration
Leader effectiveness	Asaas	Leader NPS ≈9.6 at ~45-day check	Asaas service declaration
High-volume selection design	Contax	100–300 monthly admissions structured with instruments and funnel KPIs; first psychologist in the cell	Baldini (2026)
Recruiting velocity	Walmart	2–3-day average vacancy closure; ~300 annual openings; ~10–25 candidates per selection cycle, ~15–40 openings/month	Walmart employment verification letter (2026)

Table 10. Historically documented results and their sourcing.

Note. Figures reported in the January 2026 report but absent from the current source set — a 45% turnover reduction, a 78% hiring-precision increase, 32% recruitment cost savings, a 40% productivity-time improvement, and a threefold HR return on investment — are not present in either the Methodology Dossier or the Declaration of Intentions Dossier and should be treated as unverified until a corresponding source document is supplied.

Discussion, Conclusions, and Recommendations

Conclusions

Reconciling all six control sources strengthens the evidentiary case while clarifying its limits. PCRM is a named, four-stage organizational methodology with a five-step engagement sequence; ClimateLens is its supervised, pre-launch delivery layer; the historical practice record is supported by a six-employer chronology and independent third-party statements; and the five-year business case is formula-driven within the controlling Financial Model. Future measurement properties, predictive performance, client adoption, and financial outcomes remain to be tested prospectively following work authorization and commercial launch.

Recommendations

Reconcile or retire the PI Analyst (2018) certification claim — either produce the certificate or remove it permanently from marketing and reporting materials.

Standardize the six-employer employment chronology (Contax, Precisão Global, CDL Joinville, Walmart, UniSociesc/Ânima, Asaas) with signed-letter-grade dates across all client-facing and investor-facing documents.

Replace any remaining reference to the unsourced 45%/78%/32%/40%/3× figures with the sourced PCRM case metrics (25–35%, ~15–20%, NPS ~9.8/9.6, >75% adherence, 600+ annual hires).

Use the complete controlling financial set consistently — Year 1–5 revenue, the approximately 90% founder-delivered-services / 10% ClimateLens subscription mix over five years, annual EBITDA and net income, a 12% discount rate, an NPV of approximately US$663,723, a modeled IRR of approximately 100.2%, an ROI of approximately 13.82×, a business value of approximately US$2.586 million, and a three-year discounted payback — labeling every figure as modeled, not realized.

Present the illustrative 100-FTE client-savings example (≈US$275,000/year) consistently as a modeled planning illustration, not a guaranteed outcome, in every client-facing use.

Keep the geographic narrative consistent: adopt the Sanford-headquartered, Central Florida / Southeast five-year roadmap (with a remote national layer) as the single official plan, rather than reinstating an earlier Florida–Texas–California rollout.

Continue documenting each new engagement with signed scope, baseline, data provenance, instrument version, response quality, founder review, intervention owner, and follow-up outcome. This evidence is necessary both for immigration/business substantiation and for prospective validation of ClimateLens measurement properties and retention-review criteria.

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