

Connections

MARCH 2009

VOLUME 17, NUMBER 2

MAGAZINE



Appointment-Taking in Today's Web 2.0 World

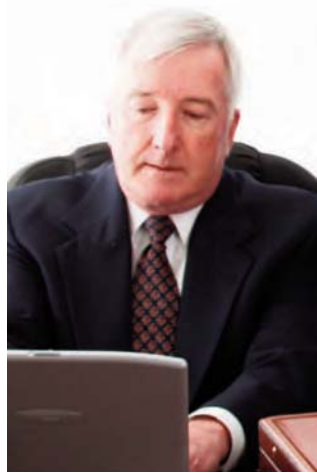
PLUS...

**SENIORS HELPING SENIORS • ATA-SRO ACCREDITATIONS
• RECESSION'S IMPACT ON CONTACT CENTER TECHNOLOGY**



Features

20



Seniors Helping Seniors Is Proving to Be Effective18

By Claudia Timbo
Corporate Call Center developed a business model that includes hiring retirees and senior citizens. Their vision is that senior agents are best able to serve senior callers. This "seniors helping seniors" strategy is proving to be a success.

A Recession's Impact on Contact Center Technology Investments20

By Donna Fluss
Recessions generally have a dramatic impact on the level of technology spending in the call center. Donna Fluss looks at the recession's impact on sales of contact center ACDs, IVRs, and workforce optimization suites.

ATA-SRO Accreditation: The Charlton Group Scores First23

By Angela Morris
The American Teleservices Association Self Regulatory Organization (ATA-SRO) has adopted a set of industry standards to address consumer and legislature concerns. In October 2008, The Charlton Group became the first tele-services company to become ATA-SRO accredited. Here's how they did it.



18

23

Whitepapers

Find more information online:

www.connections magazine.com/papers

- **Improving Agent Productivity with Closed-Loop Coaching,** by Richard Bucci, The Pelorus Group
- **Efficient and Effective Contact Center Growth,** by Theresa Hull-Clarke and Rick Glew
- **Aligning WFM With Corporate Goals for Maximum Strategic Value,** Frost & Sullivan Whitepaper

MyArticleArchive.com

Read more articles online at: www.MyArticleArchive.com/cm

- **Get Your Late-Paying Customers to Pay on Time,** by Gene Siciliano
- **Rally Your Employees in Tough Times: Point Toward a Better Future,** by Chris Witt
- **Creating a High Performing Culture During Tough Times,** by Holly G. Green
- **To Dig Into Large Accounts, Find a Mole,** by Landy Chase
- **Should You Fire Your Training Department? Evaluate Your Learning Department's Effectiveness,** by Sam Palazzolo
- **The Unprecedented Sales Management Challenge for 2009,** by Lee B. Salz



ATA-SRO Accreditation: The Charlton Group Scores First

By Angela Morris

The American Teleservices Association Self Regulatory Organization (ATA-SRO) was established in April 2006. Initially the ATA-SRO developed and adopted a set of industry “standards” that address consumers’ needs and seeks to minimize the need for legislation by proactively setting ethical and professional guidelines for both inbound and outbound teleservices. Now it’s time for companies to demonstrate compliance with these standards. What steps need to be taken to accomplish this task? It’s a straightforward process involving five steps:

- 1) Self-assessment
- 2) Select an ATA-SRO approved auditor
- 3) Complete the audit
- 4) Complete post audit remediation (if needed)
- 5) Submit an application to the ATA-SRO trustees for the Seal of Approval

Ultimately, the mission of the SRO is to ensure self-regulation and to prevent extensive government regulation. Josh Scism, director of government affairs for the ATA, touts the ATA-SRO as a proactive step. “Many companies think that teleservices regulations only encompass outbound telemarketing. While that is largely true today, what we’re hearing from the lawmakers is that consumers want increased regulation for inbound call handling as well. With the ATA-SRO, we are taking a leadership role in defining and promoting best practices in these channels and others rather than leaving it solely in the lawmakers’ hands to decide what the best practices should be. Ultimately, adoption of this model both ensures recognizable proactivity from within our industry and installs a competitive advantage to accredited companies if properly leveraged.”

One of the cornerstones of success is ensuring consistent implementation of the SRO standards across all inbound and outbound call center organizations. As a result, an audit and accreditation process was developed, and the ATA-SRO recently certified ten independent auditors to perform in this

capacity. In October 2008, The Charlton Group marked history by becoming the first teleservices company to become ATA-SRO accredited. I recently talked with John Dragisic, chairman, and Mick Bennett, compliance officer, for The Charlton Group.

Q. The Charlton Group was the first company to become ATA-SRO accredited. What motivated your organization to take this step?

A. John Dragisic: The ATA-SRO is a good thing for our industry. In addition, it is a good validation of our internal compliance systems. We believe that compliance is a great way to differentiate ourselves from other call center service providers. Being ATA-SRO accredited is an excellent step in the journey of compliance, and it’s a good way to ensure that you are doing the right thing. We also found that the process of being accredited forces the company to test their systems and procedures related to compliance.

A. Mick Bennett: As the director of compliance, I spend hours upon hours looking at our internal compliance program, but it is healthy to go through the accreditation process and have the external auditor ensure that we’ve taken the right approach to compliance. Going through the audit process gave me a high comfort level with the decisions John [Dragisic] and I have been making over the last five or six years. This gives us validation of internal decisions and processes, and having the external third-party audit component lends additional credibility.

Q. What are the benefits of being ATA-SRO accredited?

A. John Dragisic: Being ATA-SRO accredited has become a valuable strategic differentiator, particularly since we are the first company. At some point, we expect many companies that outsource work to third-party service providers will make this program a requirement. Of course,

(Continued on page 24)

ATA-SRO Accreditation

(Continued from page 23)

being accredited isn't the only arrow you need in your quiver. Companies still have to show good results at competitive costs. This is just one component overall.

Q. Why should other companies consider becoming ATA-SRO accredited?

A. Mick Bennett: It is in the best interests of all companies in the teleservices and call center industry to become ATA-SRO accredited. For the ATA-SRO to have maximum impact, we need a strong show of involvement. Self-regulation will only work if we are committed to it as an entire industry.

A. John Dragisic: I think most companies want to do the right thing. This is an important proactive step as our industry evolves and we move beyond the regulatory challenges of the past.

Q. Tell me about the process of becoming accredited. What did you experience?

A. Mick Bennett: There are three primary components of becoming accredited. The first is to complete a self-assessment using the Web-based online tool developed specifically by the ATA. The second step is to complete an audit using a third party ATA-SRO auditor. The third step is to submit all information to the ATA-SRO board of trustees for accreditation approval.

Q. Do you have any specific advice for companies that want to become ATA-SRO accredited?

A. Mick Bennett: I believe it is critical to take the auditor class before starting the self-assessment. The class is open to any company that wants to gain specific insight relative to the ATA-SRO requirements. Second, give yourself plenty of time. The internal project manager (typically the compliance officer) should plan to invest a minimum of 100 hours in the three phases of the process.

Q. How does the Web-based online tool work?

A. Mick Bennett: The ATA-SRO online tool simplifies a complex process. The tool ensures that all critical components are evaluated and the appropriate documentation is provided to prove compliance. We found that using the online tool was very helpful.

Q. You mentioned the significant time involved with the self-evaluation and audit. In addition to your time, who else from your organization was involved in the accreditation process?

A. Mick Bennett: People from virtually all areas of our company got involved in the self-evaluation and external audit. From John Dragisic [Charlton's chairman] to the director of programming, and some operations managers, QA managers, sales managers, human resource managers, call center agents, programmers, and information technology

SZETO

TECHNOLOGIES

**TURN-KEY LINUX BASED
TAS SYSTEMS &
CALL CENTER SWITCH**

Imagine 22 years of collective ideas & recommendations from tas business owners

+

Customized solutions to meet your unique business requirements

...all in one system



IMAGINE THE **POSSIBILITIES...**

www.szeto.ca

888-421-3737

staff, we estimate that about twenty-five people were involved in the work that needed to be done to achieve ATA-SRO accreditation status.

Q. Did you change any significant processes or procedures because of going through the SRO accreditation program?

A. John Dragisic: During the third party audit, we learned that we were going too far with adding all requests to our internal DNC list, not just specific requests that the number be added to the client-specific DNC list. This means that we will be able to reduce our company-specific list.

A. Mick Bennett: We also made some small changes to our written policies, but we believe that the internal DNC list management change will have the largest impact on our business.

Q. What was easiest step in becoming ATA-SRO accredited?

A. Mick Bennett: The self-evaluation is so comprehensive that by the time the third party auditor came in, the audit itself was simplified.

A. John Dragisic: The whole thing was relatively straightforward for our team because we adopted the best practice steps suggested at last year's [Washington] Summit, such as establishing a compliance committee and conducting company-wide tests twice a year. We also conduct frequent training sessions on compliance-related issues.

Q. What was most difficult?

A. Mick Bennett: Because our company was the first to become ATA-SRO accredited and the goal was to get it done prior to the ATA Annual Convention, the compressed time frame for gathering all of the documentation was challenging. I'd recommend that companies allocate about two months to become accredited.

Q. Some of the ATA-SRO standards are more stringent than the current federal and state laws. Did your company have any difficulty with adopting the standards?

A. Mick Bennett: No. When the first draft of the standards came out, we adapted our business practices to align with the standards.

Angela Morris is president and founder of Quality Contact Solutions. As an ATA-SRO certified auditor, Angela works closely with clients who choose to become ATA-SRO certified. To contact Angela, please call 866-963-2889 x201 or angela.morris@qualitycontactsolutions.com.



To contact The Charlton Group, call John Dragisic at 608-259-8004 x226 or email jdragisic@tcgcorp.net. More information about the ATA-SRO, visit www.atasroconnect.org.

PROMPT... CONFIDENTIAL... SECURE...

IF YOU ARE THINKING OF SELLING YOUR TAS OR VOICE MAIL BUSINESS—WE ARE INTERESTED IN BUYING

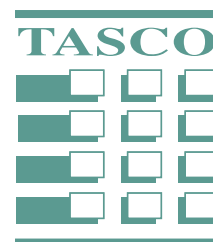
If you are considering selling your business, we would welcome the opportunity to discuss your needs and the direct purchase of your business.

We will be happy to coordinate with you and your tax advisor, if necessary, in determining effective and sensible tax strategies relating to the sale of your business, whether the transfer is on an all cash or deferred payment basis.

**Prompt quotes for full service centers
including fixtures and equipment or account
only transactions.**

**Joe Truskowski
Vice President**

**John Sophocles
President**



Message Centers
Toll Free: 1-888-558-2726
**E-mail: john@tascomessagecenters.com
joe@tascomessagecenters.com**