



Message from the President

Message from Beth English, President SCTC

At the halfway mark for 2017, I'm excited about the progress we've made and the direction we're headed.



In the 9 months since the last conference, we've transitioned headquarters operations, transformed and transitioned the member portal to a new platform, increased visibility at Enterprise Connect, Mobile World Congress, UC Expo, and a job fair, hosted 4 very popular regional meetings, kicked off VAC webinars and consultant "fire side chats", lined up an impressive, multi-faceted agenda for the Seattle conference, and secured a great conference venue for 2018. Please take a moment to thank our hard-working board members for their efforts on behalf of the SCTC. Each of them volunteers time away from their own practice to serve the organization. Without volunteers, we would not be the vibrant organization we are today.

As our visibility in the market place increases, we continue to draw new consultant and VAC members. We have taken the first steps into expanding our membership outside the traditional bounds of Telecommunications and IT. For the remainder of the year, we are shifting focus to understanding, improving and communicating SCTC value outside of the organization.

The Seattle conference looks to be a unique one in many ways: There will be ample opportunities to network in fun settings, moments to focus on personal as well as professional development, and breakout sessions on all three days. Sessions will cover everything from SDWAN to CPaaS, benchmarking, contract negotiations, structured cabling, 5G, BOTs, regulatory update, and keynote and locknote by leading industry experts. We've also added a bonus session not listed on the mailed flyer:

Incorporating A.I. Into Your Consulting Practice

This talk will explain how through open source tools and a thriving community of independent A.I. subcontractors, any consulting firm can offer client solutions in this increasingly important domain.

More information available on our website.

I hope you'll make time to join the conference. Over the years I've found the time I spend at SCTC conferences gives me the opportunity to recharge and reflect, which ultimately moves my practice forward.

Beyond the conference, there are still opportunities to stay engaged through the end of 2017:

- Monthly vendor webinars to keep up date on technology.
- Join a 2018 Regional meeting planning team. (yes, planning for 2018 regional meetings has already started)
- Lead or participate in a fireside chat webinar.
- Mark your calendars for the SCTC 2018 annual conference at the Annapolis Westin. September 23-28, 2018
- Join the 2018 annual conference planning team
- Join the 2019 Long Term Conference team (help select 2019 venue)

I look forward to seeing everyone next month in Seattle!

Beth K English

Upcoming Events

SCTC 2017 Calendar of Events

**SCTC Annual Conference – Seattle, WA
September 11 – 14, 2017**

**VAC Webinar Series -
Sonus, On the Road to Cloud
Communications
August 15, 2017**

**IP Expo – London, UK
October 4 – 5, 2017**

Reminder

- **Annual Conference Early Bird
Registration Closes on August 14th!
Register Today!**

SCTC Contact Info

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Phone: 518-254-8024
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Consultant Spotlight Janice Kloppe, CCNT

Kloppe Associates, LLC

As our industry transitions into new phases obtaining and delivering communications services, one of our long time members is transitioning into her next phase as well.

I, Janice Kloppe, SCTC Consultant member since 1997, have now formed my own Independent Telecommunications Consulting firm, Kloppe Associates!

I will continue to provide the same telecommunications consulting services as I have for over the past (almost) 30 years.

Why? After 10 years together at BTU Consultants, (and many more before that at TelCon Associates of St. Louis and Dietrich Lockard Group) myself, Carol and Lori have restructured our efforts. Carol is scaling back in order to prepare for retirement and Lori is now the sole owner of BTU Consultants. Lori will continue with her specialty of E-Rate consulting, and I will continue with my specialty of TEM (Telecommunications Expense Management) related activities.

I am now CEO and Managing Member of Kloppe Associates, LLC. Our firm provides a wide variety of telecommunication and utility consulting services for clients. These services include: Telecommunications Expense Management (TEM) programs, Utility Expense Management (UEM) programs, Long Distance Evaluations and Request for Proposal (RFP) processes, Audit of Physical Network Inventories, Wireless Analysis and Solutions, Ongoing Telemanagement, Implementation of Client-Accepted Recommendations, Coordination of Physical Conversions, Contract Negotiations and Project Supervision through Implementation and Final Acceptance.

As we all have to deal with marketing and attracting new clients, I have found that social media and website SEO (search engine optimization) services are a way to get our name out there and let others know about us.

We have recently had success with a client on the West Coast that has a portfolio of several multifamily communities. We performed a full TEM project where we identified and corrected a number of billing errors, made and implemented recommendations to reduce expenses, worked towards getting all of their bills registered and linked on the vendor portals and provided assistance with whatever their telecom related needs happened to be.

I hope to attract more clients like this through my SEO and social media efforts.

2017 BOARD OF DIRECTORS

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Message from VAC Board of Directors

Message from Dave Clardy, President SCTC VAC

As we approach the middle of August, it reminds me that the SCTC Annual Conference is just around the corner. If you have not registered for this year's conference, please don't miss out on the early bird special that ends on August 14th. You don't want to miss this year's conference in Seattle.

Consistent with our strategy of expanding Consultant and VAC membership, SCTC VAC membership at the end of July is now at 29 members. With that being said, I would also like to extend a warm welcome to all new VAC members who have joined SCTC in the recent months. Your experience and knowledge will be essential as we continue to grow the organization globally.

I look forward to discussing VAC Board positions and committee openings with new members to help us continue to prepare for the future. Should you have further questions regarding VAC director positions, please feel free to contact me at dave.clardy@mitel.com.

Also, I will be hosting an all VAC members webinar scheduled for Monday, August 14th. Save the date and watch for more details to follow.

Until then, as we enter the vacation season for many, I wish you all a safe, healthy, and restful summer break.

2017 VAC BOARD MEMBERS



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VAC Member Spotlight: Scott Amoros

Scott has spent the last 20+ years helping technology companies develop and leverage strategic relationships. Scott was recruited by Sprint Business to help develop a global consultant/advisor relations program supporting the entire Sprint portfolio. Prior to joining Sprint Business, he developed and managed a global consultant relations program for Vodafone, where he created an ongoing communications and engagement strategy that resulted in greater integration of relationships with key consultant/advisors focused on multinational companies across Europe and the Americas. Prior to that, Scott managed the Avaya consultant relations, expanding its reach into EMEA, as well as launching a digital communications strategy that included a quarterly eNewsletter, consultant webinar series and a briefing



template. Scott's earlier career included key roles with several start-ups, including NBX Corp., a pioneer in VoIP, which was acquired by 3Com. He stayed with 3Com for four years leading a global OEM team for the voice solutions division.

Scott lives in Maryland, and has been married for 30+ years to his wife Irene, whom he met in college. They have three adult sons, who all live nearby. He enjoys travel, golf, and is an avid reader (mostly historical fiction and biographies). He and Irene acted together in several plays for a local theater group in Maryland. Scott is a member of his church's refugee resettlement committee, helping to support families who have been designated as refugees by the UNHCR and the US State Department. He is also a die-hard New York Yankees fan.

Membership & Recruitment Committees are ON FIRE!

Our Membership & Recruitment Committees have been hard at work this quarter. We have received 14 new member applications and 11 have been approved over the past 3 months. Keep up the referrals of your colleagues to the SCTC!

Membership Committee

Denise Munro – Chair
Robert Harris
Rick Hathaway
Cheryl Graber
Pat Pittmon
John Lambert
Dave Clardy
Marki Callaway
Laura Gross

Recruitment Committee

Chuck Vondra – Chair
Molly Zraik
Laura Gross
Dave Clardy

SPOOFING GETS SOME WELL-DESERVED LOVE AND ATTENTION FROM THE FCC

Every year as the annual conference approaches, I send out a note asking if consultants and VAC members have specific questions that they'd like addressed. And every year, one consultant asks me if there's been any update or change in the legal issues associated with spoofing, and always, sadly, I say "no." That's no longer the case, RLH, and the case that's finally forced this issue to get the love (*read: attention*) it deserves is nothing short of a doozie!

First, a little background. I'm not sure I've ever met anyone who likes receiving robocalls, particularly the unsolicited kind. But when an entity undertakes mass calls to hundreds of thousands of people, and the caller id that pops up appears to be a local number—or shows a familiar name as the calling party, an unsuspecting caller is more likely than not to answer the call. Spoofers, being nothing if not creative, have done their homework too, and know that when the calling number looks even close to familiar—an unsuspecting target is more likely to pick up the phone than when the number is unidentified, either by name or number. So, since the goal is for you to answer the phone, they'll work creatively to mask their true identities.

When huge volumes of outbound calls are being made by devices, it's not unreasonable to assume that at least a good portion of those calls will go to numbers where such calls are forbidden by law. Think hospitals, emergency response centers and other mission-critical where a busy signal (*remember those?*) or a ring no-answer because the line is occupied by a spoofed call, can mean the difference between life and death. And this is what's gotten the FCC's attention. This, and a guy named Adrian Abramovich.

Over a three month period in late 2016, the FCC was able to determine that Mr. Abramovich's company/ies, Marketing Strategy Leaders or Marketing Leaders, made just shy of (... *wait for it...*) 100,000,000 calls, appearing to originate from local phone numbers and often identified as coming from Trip Advisor. The records contained the called number, time stamp, call duration and the caller's IP address. By relying on a new phenomenon called "neighbor spoofing," Abramovich's companies were able to spoof the first six digits (*area code and exchange*) of the numbers being dialed, thus making the recipient more likely to answer the call than ignore it because the number looked familiar.

As a point of reference, the first entity to bring the large-scale call volume to the FCC's attention in 2015 was a medical paging service company that provides paging systems for hospitals and emergency rooms. Hard to imagine an environment that's more critical. But I digress. Within months after hearing from this Virginia-based company, the FCC was notified by Trip Advisor that it too was the victim of large scale call spoofing, where calls were made under the company's name without permission or approval.

In any case, the FCC's response to the serial spoofer, which was approved at the Commission's June Open meeting has been to issue a Notice of Apparent Liability for Forfeiture (NAL). They found him responsible for perpetrating what may be the largest robocall operations that the FCC has ever pursued and assessed a forfeiture penalty of \$120,000,000. The actions

in question violate a variety of laws, statutes and regulations including the Telephone Consumer Protection Act (TCPA), the Truth in Caller ID Act of 2009, the Truth in Caller ID Act, along with federal wire fraud statutes and other FCC rules. Legal point: before the fines can actually be collected, the FCC is required to notify Mr. Abramovich of the violations of TCPA and wire fraud statutes. He then has the opportunity to comply with these rules. Without such compliance, additional hefty fines can be imposed (up to \$19,246 PER VIOLATION of TCPA and \$5,000 PER VIOLATION of the relevant wire fraud statute, under Section 503(b)(1)(D) of the Communications Act.

While it's unlikely the penalties assessed will cause anyone other than Mr. Abramovich and his employees great sadness, what's most relevant is that the FCC has issued two Notices of Inquiry related to the TCPA, one which seeks guidance on tightening industry standards to "discourage" caller ID spoofing, and the other which seeks guidance to identify methods for tracking reassigned numbers. At the base of both, however, is the robocall problem/epidemic. For more information on the reassigned numbers NOI, see <https://www.fcc.gov/document/fcc-takes-action-alleviate-robocalls-reassigned-phone-numbers-0>

Because the spoofing problem is of greater concern to consultants, I'll elaborate on it in more detail. For the full document, see (<https://www.fcc.gov/document/fcc-seeks-reliable-call-authentication-system-0>). While acknowledging that there may be some valid reasons for spoofing a number (*law enforcement, legitimate collection calls*), the FCC, in seeking comment, also recognizes that the harms to consumers outweigh the benefit of allowing spoofing which has created, as we've just seen, great opportunities for fraud and misuse.

With this in mind, the FCC has acknowledged the efforts of the Internet Engineering Task Force (IETF), the Alliance for Telecommunications Industry Solutions (ATIS), the SIP Forum and others to develop both protocols and a multi-phase framework "designed to validate calls and mitigate spoofing and fraudulent robocalling." The Commission is seeking comments on the implementation of authentication standards for telephone calls as well as on the proposals made by both ATIS and the SIP Forum. More specifically, the FCC is looking for guidance on what it can do to promote development and adoption of the ATIS/SIP framework, or other alternative frameworks. Finally, the Commission is also very interested in learning whether existing market incentives exist to encourage the adoption of authentication technologies, as well as determining how such authentication service providers can be validated. Once it's determined that validation is necessary will the Commission need to be the authority that actually does the certifying? Comments on these issues as well as others on governance and related public policy issues are encouraged. All are due by August 14th, 2017, with reply comments due by September 13th.

Finally, we're not that far away from this year's conference. If there are specific legal questions that you have related to communications technology (*or in Tom Brannen's case legal issues at the NFL*), please feel free to get them to me before the end of August so that I have time to do the required homework!

The Challenge of Meaningful Contact Centre Metrics especially for the SMB Market

By Cheryl Odee Helm

My interest in contact centre metrics was sparked while I taught Nortel's premise based enterprise ACD reporting application as they were breaking into the European market. That was back in the day when we still referred to it as a "call centre" because there weren't really other methods of communication for customers, except faxes or postal mail. I am dating myself, yet also demonstrating that in twenty-seven years of focus on contact centre routing technologies and related metrics, not much has changed other than adding new channels for customers to communicate – email, chat, SMS, video, social, mobile. We have a plethora of data and still struggle with how to evaluate that data to make meaningful business decisions. This is especially true for the SMB market, where getting the budget for contact centre business analysts can be a struggle, let alone finding qualified staff for those roles.

Our vendors have not made it any easier for the customer to create, schedule and build both historical and real-time reporting. They have provided more reports, data fields, and open databases, yet the standard report formats and real-time displays leave much to be desired. I shake my head every time a vendor or partner says, "...well all you need is a crystal reports developer on your team, or someone who can access a database, or it is as simple as just moving widgets around..." Contact centre reporting and analytics is more than pulling data from a database or multiple databases.

One of the first sites at which I instructed, the customer asked me point blank, "I understand this product has 50 standard reports that come predefined in the system, but what do they MEAN? How do I use the data to improve my business? What should I be reporting on to C Level versus to my supervisors or agents?" With those questions, I began a quest to assist customers in not only understanding how to pull a report and schedule it to print to a printer or folder on the network, but more importantly, what the report fields mean, what equations are being used to calculate the data presented, the benefit of Source (Customer) data versus Destination Data (agent skillset or workgroup), and why focusing on certain metrics can help improve business, along with the importance of the relationships between different data views.

It is important first to understand how that vendor's reporting application and database is set up. Does it have various data views or I referred to them as "perspectives" of the data? How one chooses to look at the data is dependent on what one needs to measure. From what point of view would present that information the most accurately?

Even after all the years of vendors and various organizations offering contact centre metrics courses, along with all the free webinars, customers still ask questions such as:

- "Why does this report data not match that one?"
- "Why does this not add up to that?"
- "Isn't availability the same as occupancy?"

- "Why does it give one service level output in Report A versus a different service level output in Report B?"
- "How come the ACD Talk Time for an agent does not match the talk time for the workgroup they are in?"



From my experience, regardless of the ACD "Box" used for contact routing, vendors or the implementation team, rarely ask the following questions of the customer that are critical to any call / contact routing design:

- What do you need to measure?
 - o Customer type? Language type? Number of calls or contacts sent to a third-party outsourcer? Service Level or ASA per customer type or product type?
- Will you have priority queuing of certain contact types?
 - o How that will impact the data?
- Will you use prioritization of agents?
 - o How that can affect agent statistics?
- How do you educate or train or agents?
- If introducing a virtual hold or call back queuing technology, how will impact service level, ASA and abandonment rate?
- Etc...

What I am finding is it is rare to have a person who knows any of the applications end to end, who meets with the customer from start to finish. I was fortunate to be that person in the early days of working with Nortel and its partners / customers. The challenging questions, the understanding of the customer's business, and knowing how a particular ACD application and routing design affect the data is vital to moving away from just having a lot of data, to doing something with it to move the organization ahead.

It is still true today, even as we have added additional channels of communication and increased the number and quantity of data available, we still have to start at the beginning:

- 1) Know what the customer needs to measure,
- 2) Understand the contact routing application and how it reports data,
- 3) Build contact routing designs, regardless of the channel, that will provide that data to the customer that is useful and sound,
- 4) Understand and explain how different routing methodologies and tools have an impact on data and its integrity.

Infrastructure Update



The infrastructure committee is in the final phase of the website transition project. After overseeing a successful migration to a new membership platform and website, work has been underway to fine tune the elements that are of the most importance to the members.

One element that has needed attention is the “find a consultant” search capability. We are in the process of re-developing that process to make it as easy as possible for prospective clients to find the best member resources possible. This process includes reworking the search page, the results page, and the member profile pages. While some of the changes are already underway, we are on track to

present the completed search process at the annual conference in September. We will also be sending out a communication with the pertinent details following the conference.

We are moving closer to the overall vision of a website that is more streamlined and offers an improved user experience to our members, prospective members, and potential clients. Stay tuned for more updates!

Tom Brannen

SCTC Infrastructure Committee Chair

Finance Update

With the transition to Cap Hill complete we have settled into a regular financial and budget review process and the board will be revisiting our overall financial priorities and goals at our board meeting in Seattle in September. Our intent of this discussion will be to focus our energies (and finances) on initiatives that can increase the value of the organization to our members. Heading into these conversations at the retreat, I would welcome input from any members regarding the organization’s financial priorities and / or budget.

Second quarter financials have been posted to the website. Revenue and expenses are both down a bit from the budget and overall we are anticipating close to a break-even year. If you have any questions, concerns or input on the organization’s finances, please contact me directly.

I look forward to seeing many of you in Seattle.

Molly Zraik
SCTC Treasurer

Fire Side Chat

We’re starting a new Education Series designed specifically for Consultant Members of SCTC. These sessions will be focused primarily on Practice Management Techniques and will allow you the time to speak with your colleagues and fellow members of SCTC regarding issues you deal with daily.

The first session is scheduled for Tuesday, August 22, 2017 at 2:00 pm ET. It will be a one hour session.

The topic for this session is “Social Media and How to Use it to Build Your Image as the “Expert” Clients Turn to First”. The session will be led by the Social Media Specialist at Capitol Hill Management Services, Victoria Ortiz. She will be making a short presentation on the latest news in the SM area to be followed by Q/A and group discussion.

An Overview Of Certain Elements Of Canada's Anti-Spam Legislation And Recent Developments

*By Christian S. Tacit, Founder, Tacit Law**

Canada's Anti-Spam Legislation (CASL), which has been in effect since July 1, 2014 prevents a number of practices related to electronic commerce that could harm the public. Among other things, it generally prohibits the sending of commercial electronic messages (CEMs) such as messages to email addresses and social networking accounts, and text messages sent to a mobile phone, without the recipient's consent. If a business or organization sends CEMs to promote a product or service, it must comply with CASL's requirements to: **(1)** obtain consent; **(2)** provide identification information; and **(3)** include an unsubscribe mechanism in each message.

There are two forms of consent for sending CEMs, namely express and implied.

Express consent means that a person has clearly agreed, either in writing or orally, to receive CEMs from a particular source. Since the recipient must take proactive action to indicate express consent, such consent must be obtained through an opt-in mechanism, such as, signing up at the originator's website. Since an electronic message that contains a request for express consent is also considered to be a CEM under CASL, a CEM cannot be used to obtain express consent. The key benefit of obtaining express consent is that it is not time-limited and will only cease if the recipient unsubscribes.

Implied consent may result from an existing business relationship based on: **(1)** a previous commercial transaction with the recipient; **(2)** having certain existing non-business relationships, such as, membership in a club or participation as a volunteer in a charitable organization; or **(3)** where a person makes its email address publicly available by publishing it on a website, unless it is accompanied by a statement indicating they do not want to receive CEMs at that address. If the statement is not present, in order to send a CEM, the message must relate to the recipient's business role, functions or duties in an official or business capacity. There is a time-limitation attached to the life of the implied consent.

During a three year transition period that recently ended, organizations had considerable flexibility for

grandfathering implied consent. As of July 1, 2017, organizations are required to adhere strictly to the express or implied consent rules in CASL. This means that organizational database criteria for establishing category compliance should adhere to the specific consent criteria of CASL, and should also include confirmation (*supported by corresponding evidence*) that the contacts in database have granted express or implied consent to receive CEMs and that the consent has not been revoked.

The Canadian-radio television and Telecommunications Commission (CRTC) is responsible for enforcing the aspects of CASL discussed above. The enforcement powers that the CRTC has in this regard, includes the ability to levy Administrative Monetary Penalties (AMPs). The maximum AMP for a breach of CASL is \$25,000 in the case of an individual for a first breach and \$50,000 for subsequent breaches, and \$10,000,000 in the case of a corporation for a first offence and \$15,000,000 for subsequent breaches.

A private right of action that was supposed to come into force on July 1, 2017 and could result in very significant statutory damages levied against a breaching party if it ever comes into effect, has been deferred by the government.

Breaches of CASL can have significant adverse financial and reputational consequences for organizations. The rules are complex and intricate and this article can only hope to scratch the surface in order to create very broad awareness of the legal framework and pitfalls relating to the consent requirements associated with CEMs. Any party that is unsure how to proceed is advised to obtain legal advice.

*Tacit Law is a boutique law firm based in Ottawa, Ontario, focused on technology, corporate, commercial, not-for-profit, governance, communications, privacy, competition, intellectual property, employment law, regulated industries and related advocacy and litigation. Christian Tacit is a SCTC member and holds an Electrical Engineering degree from the University of Waterloo, as well as a Bachelor of Laws and Master in Business Administration from the University of Ottawa. He is a licensed professional engineer, registered trade-mark agent and lawyer.