



2018 ANNUAL REPORT

OUR MISSION

The National Amtelco Equipment Owners is an association dedicated to education, networking, and the development of best practices among members.

OUR VISION

To be an indispensable resource for all Amtelco users.

CONTENTS

President	2
Conference	3
Financial	4
Future Directions	6
Healthcare User Group	7
Membership	8
Professional Development	10
Communications	11

PRESIDENT'S REPORT

It's hard to believe how quickly the year has passed and my term as NAEO President 2018 has nearly come to an end. I would like to begin by thanking our previous President, Lina Cunningham for her unbelievable dedication to NAEO. Serving as Past President, Lina has committed a tremendous amount of her personal time and energy to our Association and has been a confidant and mentor to me over the past year.

In 2018 NAEO added two new Board members and welcomed back another. Tifani Leal of A1 Professional Answering Services successfully re-ran for a second term on the Board and I want to take this opportunity to thank her for her dedication and commitment to our Association. Welcoming to the Board in 2018, Jason Miller of Southern Voices and Evelyn Portinari of Always On Call Answering Services. With a strong technical background and member of the FDC Jason was primed to take over as FDC Chair. With past experience working with the Conference Committee, Evelyn was appointed Conference Chair. In early summer Evelyn resigned from the NAEO Board due to a change in employment. Shortly thereafter, Marie McGuire of AnswerTel accepted the vacant Board seat. Thank you Marie for stepping forward and committing yourself to our association.

2018 marked the end of term for our service agreement with Ewald Consulting, who provides NAEO with Association Management Services. The Board tendered a RFP and reviewed numerous applications prior to Conference. At Conference in Ft. Lauderdale, the Board met with four management companies for formal presentations and Q&A sessions. I would be remiss without a heartfelt thank you to Tifani for taking on this tedious process. On behalf of the Board and our Association, I extended our partnership with Ewald Consulting for an additional 3 years. In addition, I am very pleased to announce that Gigi Sutton has taken on the role of Executive Director and Sarah Ewald has accepted the role of Event Manager.

In May of 2018, the Board travelled to Madison, WI for our annual Amtelco Summit to discuss current issues relevant to our Association and plan for the future. This year marked a 3 year review of our strategic plan. Led by Eric Ewald of Ewald Consulting, the Board endeavored to address questions around organizational growth and sustainability. The goal, to identify new opportunities for growth, to develop new initiatives with clear objectives and timeframes for tasks. On the final day of our in-person meetings, the Board travelled to Amtelco headquarters to meet with its senior management and officers. Our Agenda was a review of the previous conference and to provide feedback from our Conference and Future Directions Surveys.

In July, NAEO Professional Development Committee hosted our annual Summer Series Workshops in beautiful Chicago, IL. New for 2018, PDC added a Supervisor Leadership Workshop covering customer care, handling complaints and employee issues to name a few. As with previous years, I.S. Scripting

Workshops covered 3 full days of in-depth workshops on intermediate Intelligent Series programming and advanced Contact Based Architecture. I am pleased to announce Summer Series 2018 was the highest attended workshops to date. Congratulations PDC and a sincere thank you to this year's presenters and coaching group.

In October the Board travelled to this year's conference destination, San Juan, for our final in-person meeting of the year. Our Agenda focused heavily on conference planning with tours of the facility, property and nearby amenities. After Hurricane Maria ravaged Puerto Rico in 2017 the fall site visit was of paramount importance. The Board and I are very happy to report the city of San Juan and our hotel, The InterContinental, are in fantastic condition. The President and hotel manager met with the Board to discuss their role as a relief center after the event. Sadly many of us know the devastating effect of weather - hurricanes, fires, tornadoes and even blizzards (yes, I am from the North) and are familiar with disaster planning and emergency preparedness.

Thank you to our amazing community of businesses and members who came together this year to help support the NAEO Relief Fund. A special thank you to the Maryann Wetmore Foundation for your generous contribution. It has been my honor to serve on the Relief Fund Committee for the past two years. With your help, NAEO was able to assist those effected by the Wild Fires in Paradise, California and award \$12,000 to help 8 applicants who suffered from this tragedy.

Our committees have worked so hard this year and I can't even begin to thank them enough for their tireless efforts to promote and build strength in our Association. Each committee is vital to the success of NAEO and is made up volunteers from our member companies and supported by our vendor. If you have not served on a committee, I strongly suggest you volunteer. NAEO is an association dedicated to education, networking and the development of best practices. During my three year term on the Board I have built friendships that will last a lifetime. I can think of no better reason to suggest volunteering your time and helping our great Association. Thank you to the members of the Board of Directors, it has been a pleasure working with each of you and I look forward to serving as Past President. You have made this year a true success and I have been honored to serve with you.

Thank you,
Ian Cooke



SUBMITTED BY:

Ian Cooke,
NAEO President

CONFERENCE REPORT

In 2018, we Cruised Together Towards Tomorrow at our NAEO Annual Conference at the Hilton Fort Lauderdale Marina. We had over 180 members in attendance with a full agenda to make a great conference true to our mission in, "...education, networking, and development of best practices among members". This year, we were able to come in under budget, avoid a price increase for the cost of registration and fulfill a goal of reducing the cost of registration for the 2019 Annual Conference.

Our Keynote speaker, Gary Gzik provided a high energy talk for the Purpose Driven Company titled, "Build a Kick Ass Company". He delivered a great message and provided practical examples to help Find Your Mojo, build Legendary Leaders, and create Hell Yeah teams. In addition, some of the brightest minds in our industry volunteer their time and knowledge every year in our round table and breakout sessions. 2018 was no different as NAEO was able to provide three full days of relevant content for today's Infinity Contact Center.

At the business meeting, Gordon Mott ended his term on the NAEO Board of Directors. Evelyn Portinari and Jason Miller were elected to their first terms on the board and Tifani Leal was re-elected for her second term. Lina Cunningham, outgoing NAEO President, passed the gavel to our incoming NAEO President, Ian Cooke.

Honored this year at the conference was Dan Cropp as the Amtelco Employee of the Year for his efforts in being an advocate for our membership; Evelyn Portinari from Always on Call Answering Service, LLC received the President's Award; Jamie Hay from Spectrum Communications Ltd. received the Volunteer of the Year award; Ashley Andersen from The Legacy Connection was the Christina Collins Scholarship Winner; Kaylin Cowherd from Advanced Answering Center was the Curtin Scholarship Winner, and Mari Osmon was inducted into the Honorary Society.

Overall, the NAEO 2018 Annual Conference was a great success! The moment the 2018 conference came to an end, the amazing and dedicated volunteers on our conference committee started compiling and reviewing feedback from the conference survey to start planning the 2019 Annual Conference in San Juan Puerto Rico. This amazing group of volunteers has been working all year to ensure the success of our 2019 Annual Conference, all while working within budget to ensure that our membership is well served.

We are happy to announce that, with the help of our volunteers and your feedback from last year's conference survey, NAEO is providing three full days of content by hosting an amazing keynote, 18 breakout sessions, 11 roundtables, and 35 speakers to share industry and user group relevant content.

As Ian Cooke passes the gavel to Robert Bennett, we know that our membership will continue to be in good hands as we leap into the future with the tools and support we need to succeed in 2019!

NAEO would like to thank our 2019 Conference Sponsors:

- Platinum Sponsor: Amtelco
- Keynote Sponsor: PeoplePraise
- Welcome Reception Sponsor: Pulsar360, Inc.
- Breakfast Sponsor: ProHIPAA
- Round Table Sponsor: Phillips Consulting & Analytics

NAEO would like to take a moment to thank our incredibly hard-working committee members and the companies that support their participation:

- Adrian Trevino, Personalized Communications, Inc.
- Deborah Anders, The Legacy Connection
- Jamie Hay, Spectrum Communications, Ltd.
- Jillian Henry, Crocker Communications, Inc.
- Julie Sparklin, Main Line TeleCommunications
- Kim Lauer, Personalized Communications, Inc.
- Lainya Hohn, Bennett Answering Service
- Lina Cunningham, Extend Communications, Inc.
- Marie McGuire, AnswerTel
- Megan Webster, Wagner Communications, Inc.

As always, our conference content and format are completely directed by the results, comments, and suggestion of the previous conference surveys. Be sure to be on the lookout as the surveys are scheduled to arrive in your inbox on the last day of conference.



SUBMITTED BY:

Adrian Trevino,
Conference Committee Chair

NAEO — DID YOU KNOW?

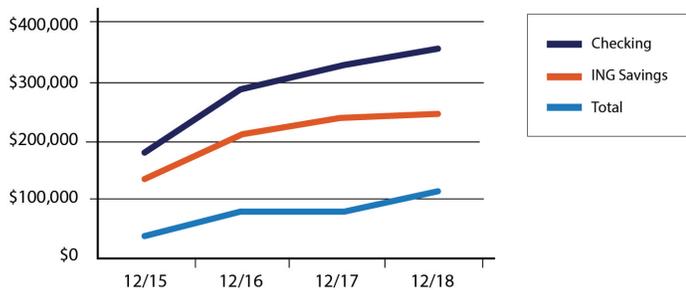
"We Survived Gloria for EVE" became the motto for the 1985 NAEO Conference (T-shirts were printed with this!)

In 1985, NAEO survived Hurricane Gloria in New Jersey. The storm was the first significant cyclone to strike the Northeast US since 1972 — and our meetings carried on with jiggling ceilings and torrential rains from the Cat 4!

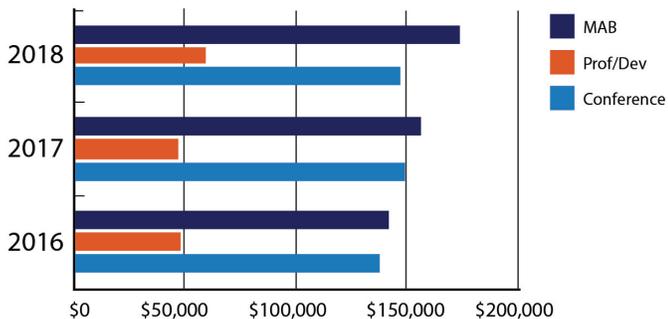
FINANCIAL REPORT

NAEO remains a financially healthy organization with continued growth in fiscal strength and stability. Financial statements are prepared monthly and are generally available by the 15th of the following month. In the past several years the board has generated positive cash flow and continues to build capital reserves.

The graph below is the increase in the Checking and ING Savings accounts. As of December 31, 2018, NAEO had a total of \$360,030.78. Years ago, the board put into place during their strategic planning a goal to have 18 months operating expense reserve set aside (approximately \$270,000). As of December 31, 2018, we have \$245,104 in reserve.



NAEO's operations/finances are organized into three functional areas: Conference, Professional Development (formerly Education/Workshops) and Membership/Administrative/Board (MAB). The graph below is showing the income for each functional area for the past 3 years. The Membership income has increased by 21.2%, (\$30,569) compared to 2017. The membership committee's retention program is producing positive results. The membership committee is also working with Amtelco's OneCall division and TUNE to recruit new members. The largest factor of administrative expenses is the management contract. This expense will continue to be the largest single item for the foreseeable future.



A comparative synopsis of 2018 vs 2017 results plus the 2019 budget is below. There are several reasons for the positive income for MAB in 2018. First is the Membership dues are up by \$30,569. Second, we are now providing HIPAA training and third, we now have superior agent service award. These two new products have been successful in bringing in new revenue for our membership.

	Conference	Professional Develop.	MAB	TOTAL
2017 Results				
Revenue	\$150,619	\$46,837	\$184,291	\$381,747
Expenses	\$106,004	\$32,343	\$216,988	\$355,335
Net Income	\$44,615	\$14,494	\$(32,697)	\$26,412
2018 Results				
Revenue	\$146,142	\$59,483	\$188,987	\$394,612
Expenses	\$125,855	\$58,606	\$173,569	\$358,030
Net Income	\$20,287	\$877	\$(15,418)	\$36,582
2019 Budget				
Revenue	\$135,225	\$53,850	\$162,300	\$351,375
Expenses	\$133,400	\$40,640	\$175,225	\$349,265
Net Income	\$1,825	\$13,210	\$(12,925)	\$2,110

The budgeting process is stable and the cost accounting system allows strong management of our finances. We are forecasting a \$2110 profit in 2019 based on revenues of \$351,375 and expenses totaling \$349,265.

Each member of the board and all of our committees continue to be good custodians of NAEO's resources.

A detailed summary of NAEO's financial performance is included in the following pages.



SUBMITTED BY:

JoAnn Fussell,
NAEO Secretary / Treasurer

	Annual Conference		Curtin Scholarship		Education & Workshops		Administrative (MAB)		Board of Directors(MAB)		Membership (MAB)		Total MAB		TOTAL	
	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET	JAN-DEC 18	BUDGET
ORDINARY INCOME/EXPENSE																
INCOME																
Advertising Income	0.00		0.00		0.00		0.00	1,000.00	0.00		830.00		830.00	1,000.00	830.00	1,000.00
Commission/SNUG Income	12,167.30	10,000.00	0.00		255.00	100	0.00		0.00		0.00		0.00		12,422.30	10,100.00
Curtin Scholarship Fund			1,469.00	500.00	0.00		0.00		0.00		0.00		0.00		1,469.00	500.00
Donations	0.00		100.00		0.00		1,050.00	300.00	0.00		0.00		1,050.00	300.00	1,150.00	300.00
HIPAA Training revenue	0.00		0.00		3,330.00	4,000	0.00		0.00		0.00		0.00		3,330.00	4,000.00
Interest/Investments	0.00		1.85	3.00	0.00		969.23	1,000.00	0.00		0.00		969.23	1,000.00	971.08	1,003.00
Membership Dues																
Regular Dues	0.00		0.00		0.00		0.00		0.00		174,663.27	150,000.00	174,663.27	150,000.00	174,663.27	150,000.00
Total Membership Dues	0.00		0.00		0.00		0.00		0.00		174,663.27	150,000.00	174,663.27	150,000.00	174,663.27	150,000.00
Product Sales	0.00		0.00		150.00	500	0.00		0.00		0.00		0.00		150.00	500.00
Registrations	104,225.00	104,225.00	0.00		51,473.00	45,000	0.00		0.00		0.00		0.00		155,698.00	149,225.00
Sponsors	29,750.00	21,000.00	0.00		4,275.00	4,250	0.00		0.00		0.00		0.00		34,025.00	25,250.00
SASA	0.00		0.00		0.00		0.00		0.00		11,475.00	10,000.00	11,475.00	10,000.00	11,475.00	10,000.00
TOTAL INCOME	146,142.30	135,225.00	1,570.85	503.00	59,483.00	53,850	2,019.23	2,300.00	0.00		186,968.27	160,000.00	188,987.50	162,300.00	396,183.65	351,878.00
GROSS PROFIT	146,142.30	135,225.00	1,570.85	503.00	59,483.00	53,850	2,019.23	2,300.00	0.00		186,968.27	160,000.00	188,987.50	162,300.00	396,183.65	351,878.00
EXPENSE																
Accounting Services/Taxes	0.00		0.00		0.00		725.00	750.00	0.00		0.00		725.00	750.00	725.00	750.00
Advertising	0.00		0.00		0.00		0.00	250.00	0.00		0.00		0.00	250.00	0.00	250.00
Awards/Gifts	1,311.50	1,100.00	0.00		0.00		0.00	300.00	743.11	1,000.00	0.00		743.11	1,300.00	2,054.61	2,400.00
Credit Card Fees	0.00		0.00		86.77	90	11,354.74	12,000.00	0.00		0.00		11,354.74	12,000.00	11,441.51	12,090.00
Equipment Rental	17,115.30	15,000.00	0.00		896.95	3,000	0.00		0.00		0.00		0.00		18,012.25	18,000.00
HIPAA Training expense	0.00		0.00		4,189.50	5,000	0.00		0.00		0.00		0.00		4,189.50	5,000.00
Insurance	0.00		0.00		0.00		1,456.16	1,500.00	0.00		0.00		1,456.16	1,500.00	1,456.16	1,500.00
Lodging	7,808.00	7,000.00	0.00		3,130.30	3,000	0.00		2,093.06	3,000.00	0.00		2,093.06	3,000.00	13,031.36	13,000.00
Management	0.00		0.00		0.00		107,608.98	110,000.00	0.00		0.00		107,608.98	110,000.00	107,608.98	110,000.00
Management Travel	3,682.92	4,500.00	0.00		0.00		0.00		69.82	100.00	0.00		69.82	100.00	3,752.74	4,600.00
Marketing	0.00		0.00		0.00	200	1,715.07	2,000.00	0.00		0.00		1,715.07	2,000.00	1,715.07	2,200.00
Meals	70,623.03	75,000.00	0.00		37,451.06	16,000	0.00		14,584.03	10,000.00	0.00		14,584.03	10,000.00	122,658.12	101,000.00
Meeting expenses	0.00		0.00		0.00		0.00		3,130.88	3,000.00	0.00		3,130.88	3,000.00	3,130.88	3,000.00
Membership Locator Site	0.00		0.00		0.00		0.00		0.00	0.00	0.00		0.00	0.00	0.00	0.00
Postage	4,146.11	4,000.00	0.00		162.53	150	1,607.23	1,600.00	0.00		0.00		1,607.23	1,600.00	5,915.87	5,750.00
Printing	3,603.54	4,000.00	0.00		2,152.55	2,000	1,455.55	1,500.00	0.00		0.00		1,455.55	1,500.00	7,211.64	7,500.00
Scholarships	0.00		0.00		500.00	2,500	0.00	300.00	0.00		0.00		0.00	300.00	500.00	2,800.00
Speaker Expenses	6,127.08	6,000.00	0.00		1,061.58		0.00		0.00		0.00		0.00		7,188.66	6,000.00
State Taxes	0.00		0.00		0.00		40.00		0.00		0.00		40.00		40.00	0.00
SASA Expenses	0.00		0.00		0.00		0.00		0.00		9,645.82	10,000.00	9,645.82	10,000.00	9,645.82	10,000.00
Supplies	4,855.32	4,800.00	0.00		1,473.78	200	51.51		0.00		0.00		51.51		6,380.61	5,000.00
Technology	2,500.00	4,000.00	0.00		3,360.00	4,000	5,837.13	6,000.00	0.00		0.00		5,837.13	6,000.00	11,697.13	14,000.00
Telephone	0.00		0.00		0.00		1,093.53	1,100.00	0.00		0.00		1,093.53	1,100.00	1,093.53	1,100.00
Travel	7,783.47	8,000.00	0.00		2,645.77	3,000	404.60		9,752.28	10,600.00	0.00		10,156.88	10,600.00	20,586.12	21,600.00
Warehousing	0.00		0.00		0.00		200.54	225.00	0.00		0.00		200.54	225.00	200.54	225.00
Webinar	0.00		0.00		1,495.20	1,500	0.00		0.00		0.00		0.00		1,495.20	1,500.00
TOTAL EXPENSE	129,556.27	133,400.00	0.00		58,605.99	40,640	133,550.04	137,525.00	30,373.18	27,700.00	9,645.82	10,000.00	173,569.04	175,225.00	361,731.30	349,265.00
NET ORDINARY INCOME	16,586.03	1,825.00	1,570.85	503.00	877.01	13,210	-131,530.81	-135,225.00	-30,373.18	-27,700.00	177,322.45	150,000.00	15,418.46	-12,925.00	34,452.35	2,613.00
NET INCOME	16,586.03	1,825.00	1,570.85	503.00	877.01	13,210	-131,530.81	-135,225.00	-30,373.18	-27,700.00	177,322.45	150,000.00	15,418.46	-12,925.00	34,452.35	2,613.00

FUTURE DIRECTIONS COMMITTEE

The Future Directions Committee has been working diligently to listen and communicate the needs and concerns of all of our members to Amtelco leadership. Recognizing the software needs of our members is a top priority of the FDC. The membership and participation in FDC has steadily increased over the past year. I look forward to working with the dedicated members of the FDC and Kevin Beale and his team in 2019.

This has been an active year for the FDC. Over the past year, the FDC has hosted five webinars. We look forward to hosting additional FDC Presents Webinars in the upcoming year as well as continuing to work with the professional development committee to host webinars on a wide range of topics including cloud infrastructure setup and best practices.

This past year the FDC has hosted two owner's and executive calls with great success. The first call took place post conference and provided a platform for owners and executives to have their opinions heard despite being unable to attend the session personally at conference. The information gained from this call was presented to Amtelco in the spring of 2018 at the in-person meeting. The second call took place in February 2019 and the information from this call was directed to Amtelco pre-conference. The FDC is discussing the possibility of hosting an additional call in the fall of this year. I look forward to having multiple post conference calls in 2019.

A top initiative the FDC has been continually working on this year is the creation and publication of the FDC Open Source / Freeware Library. This resource is now available on the NAEO website. This is a valuable tool for the NAEO community as these applications can save call centers money by increasing efficiency and helping provide a higher level of customer service to clients. Each of these applications has been reviewed by the FDC and the majority are currently in use in at least one of the members call centers.

The FDC made it a priority this past year to revive the monthly Innovation Machine calls with Amtelco and ensure that issues and proposals from our membership are reviewed in

a timely manner. This has been a tremendous success and in partnership with Amtelco we are now reviewing only the most recent submissions. This outcome was made possible by the collaboration and dedication of our membership and the Amtelco team.

Committee Members:

- Jason Miller - Chair
- Mike Crossman – Vice Chair
- Alan Tucker
- Alex MacLennan
- Eric Smith
- Greg Beale
- Ian Cooke
- James Sneed
- Jeff Farber
- Jeff Livingston
- Jeff Zindel
- Jim Wagner
- Kevin Beale
- Kurt VanderScheer
- Laurie Blow
- Mark Frey
- Matthew Crocker
- Michael Goumas
- Rossi Fraenkel
- Scott McIntyre
- Theran Mossholder



SUBMITTED BY:

Jason Miller,

Future Directions Committee Chair

NAEO — DID YOU KNOW?

The first joint EVE and PCMX meeting was held in St. Petersburg, Florida at the Tradewinds Hotel.

HEALTHCARE USER GROUP REPORT

In 2018, HUG met monthly to discuss:

1. What your department is currently focusing on
2. Any Challenges you may be facing that your member peers may be able to help you with
3. Other topics identified on the agenda

These meetings are a great way for Hospital members to collaborate with likeminded individuals. We are able to bounce ideas with one another and share best practices.

After becoming an official committee in 2016, we identified some of the core NAEO benefits that Hospitals can more readily take advantage of, as well as some of the unique challenges facing the not-for-profit Healthcare systems.

Our goals remain:

1. Improve the experience for all HUG members
2. Demonstrate the value of NAEO to 1Cal members
3. Increase the number of organizations and members in HUG
4. And NEW this year – add a Virtual Education Series w/a Hospital Focus

RYVER:

In 2018, RYVER was rolled out as a benefit for the entire NAEO membership. This allowed the HUG and 1Call members to network and interact with other likeminded people in real time.

Hospital Education:

Monthly webinars geared towards our hospital and healthcare members began in December and have been well attended.

- December.... Redesigning your IS/Agent SetupJ
- January Getting Ready for Genesis
- February..... Mergecomm

Virtual Education Series:

Spring of 2019 will bring our first Virtual Education Series. Similar to IS Summer series, this virtual series will give access to those HUG members and 1Call members who normally are not able to attend due to travel budget issues. The series will be 3 full days of intense learning in a virtual setting. No need for hotel rooms or travel expenses and the price is built into the 1Call membership.

1Call Sig Group:

NAEO dispatched Tifani to the 1Call seminar in Madison, WI to represent and man a booth donning NAEO giveaways and information. This year, the NAEO booth was included in the main

session room, encouraging more interaction with the attendees. The overall perception that NAEO was a division of Amtelco was clarified by our presence and PowerPoint presentation by Tifani and Rossi. Assisted by Linda Wilson and Rossie Fraenkel, spotlighting the valuable benefits of membership garnered a lot of attention, not to mention the tub of Tabasco products, a South Louisiana tradition, donated by A1 Professional Answering Service for a drawing. As mentioned, the Tub of Tabasco products, enabled us to collect contact information from attendees for follow-up after 1Call. Theran Mossholder was also in attendance where he presented a session on Code Call Scripting which was well received. We have gained 3 new members with several prospects on the horizon.

I would like to take this opportunity to thank all our HUG members for their hard work and diligence during this term. Keeping us current and your input was invaluable to our success.



SUBMITTED BY:

Rossi Fraenkel,
HUG Committee Chair

NAEO — DID YOU KNOW?

Amtelco installed its first Electronic Video Exchange (EVE) system at Spectrum Communications, located in Wauwatosa, Wisconsin, in May 1983, and debuted its new product at the Associated Telemessaging Services International (ATSI) meeting in June of that same year.

The following year the number of EVE system installations increased, and the new owners gathered in St. Louis, Missouri to network and discuss what additional features might be added to the EVE system to make it stronger. These discussions included John Morley, the original architect of the EVE system.

MEMBERSHIP REPORT

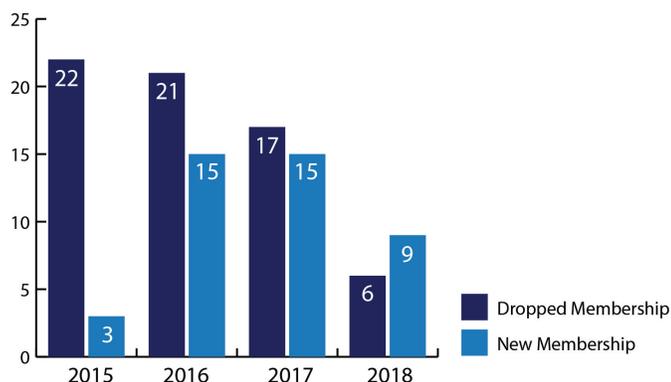
Monthly renewals for NAEO membership came to an end in December 2017. Annual renewals for all members at the end of each year allow the Membership Committee complete focus on those who renew, as well as encourage those who are on the fence. More emphasis is now spent encouraging past members to come back and the recruitment of new ones.

The Membership Committee under the leadership of Chair Tifani Leal and Vice Chair JoAnn Fussell began the year with 139 members. Their efforts harvested a recovery of 12 past members and 9 new members. Due to mergers and purchases, 6 members were lost ending the year with 164 dues paying members. This 12% increase is only the beginning as we will continue to pursue additional companies to improve these numbers.

The first task was to scrub the NAEO ListServ, PDC Library and RYVER of non-eligible participants. Alerting Amtelco of their non-participation in the group caused them to forfeit the 10% discount that is a great benefit for being a member of this group. This enabled the recovery of some of our win backs.

Next, we reached out to former members with emails and phone calls to remind them of the many privileges included in membership they would be missing and potential new members to advise them of all we have to offer.

Membership: 164 Current



Focusing our attention on more benefits for NAEO members, strategizing to attract SIG (Special Interest Group) memberships, developing more hospital participation as well as partnering with TUNe will define our goals for the future.

HIPAA Certification Program:

The HIPAA Certification Program was rolled out at our 2018 conference in Fort Lauderdale and has aroused a lot of attention. To date, 530 agents have been certified.

Special Interest Groups (SIG):

Special Interest Groups are beginning to see some growth. The gain of 3 new members from the TUNe Group and 3 from the 1Call Group is definitely an improvement.

NAEO dispatched Tifani to the 1Call seminar in Madison, WI to represent and man a booth donning NAEO giveaways and information. This year, the NAEO booth was included in the main session room, encouraging more interaction with the attendees. The overall perception that NAEO was a division of Amtelco was clarified by our presence and PowerPoint presentation by Tifani and Rossi. Assisted by Linda Wilson and Rossi Fraenkel, spotlighting the valuable benefits of membership garnered a lot of attention, not to mention the tub of Tabasco products, a South Louisiana tradition, donated by A1 Professional Answering Service for a drawing. As mentioned, the Tub of Tabasco products, enabled us to collect contact information from attendees for follow-up after 1Call. Theran Mossholder was also in attendance where he presented a session on Code Call Scripting which was well received. We have gained 3 new members with several prospects on the horizon.

Tifani and Linda are planning to attend the TUNe Annual Conference in New Orleans April 2019 to showcase NAEO Benefits in hopes of recreating the magic and success of our 1Call attendance!

Hospital Education:

Monthly webinars geared towards our hospital and healthcare members began in November. Spring of 2019 will bring our first Virtual Education Series. Participation continues to grow with each month due to these innovative efforts.

Positive effects of NAEO Membership expansion will help us reach the following goals:

- Avoid increased membership costs
- Opportunities to learn from different perspectives
- Decreasing conference fees
- Increasing Networking and Collaboration

Over the course of next year, NewsLinks will be spotlighting exclusive member benefits as well as Member Companies. If **YOU** would like to **SHARE YOUR** story, please contact us. We look forward to highlighting your accomplishments.

Remember, ALL members can assist in the recruitment of NEW members. You do not have to be on the Membership Committee to do so. However, please consider joining the committee as all help is greatly appreciated and a step towards becoming an NAEO Board member.

Membership Committee meets monthly by conference calls at no cost to you. Members lead and participate on various projects and seek new opportunities to improve on the existing. Please send any inquiries about volunteering for this committee or having your company spotlighted in Newlinks to membershipcommittee@lists.naeo.org.

I would like to take this opportunity to thank all our Membership Committee members and my Vice Chair, JoAnn Fussell for all of their hard work and diligence during this term. Keeping me current and your input was invaluable to our success.

Jana Olson with Amtelco was an integral part of our group this year and we owe her enormous appreciation as her support and commitment was incomparable.

Membership Committee Members

- Tifani Leal, Chair
- JoAnn Fussell, Vice Chair
- Robin Bailey
- Rob Bennett
- Rossi Fraenkel
- Jolie LeBlanc
- Whitney Murray
- Jana Olson, Amtelco Liaison (RockStar)



SUBMITTED BY:

Tifani Leal,

Membership Committee Chair

NAEO — *DID YOU KNOW?*

Fall 1984

Over 50 people attended the first Amtelco EVE Conference which was held at Lincolnshire in Chicago, Illinois. After much discussion and brainstorming, the group made the decision to form a formal equipment user group and selected their first board of directors (Mari Osmon, Jim Marchbank, Larry Gignac, Todd Kamp, Sandy Arbuthnot, Jan Cosby, Earl Kunz and Jeanette Parent). The user group was named NAEO (National Association of EVE Owners). We elected to hold two meetings per year and annual dues of \$100.00 per service. All association functions were carried out on a volunteer basis. Larry Gignac was named as the first president.

PROFESSIONAL DEVELOPMENT

The Professional Development Committee (PDC) has had another busy, productive and exciting year! We welcomed Jaimie Guidry as our new Vice Chair and our dedicated committee members worked hard to deliver another year of remarkable education content to all NAEO members. This year we focused on four major projects: adding more content to the Professional Development Library, scheduling educational webinars for the year, the Summer Series Workshops and the Advanced Technical Workshop. All of the success comes from the hard work and dedication of the Committee members.

Professional Development Library

The Professional Development Library gives all members access to the educational videos created by members of the PDC as well as create your own in-house online learning center – and it's included in your NAEO membership. The PDC members have been hard at work and have completed videos focusing on each section of UltraComm. They are continuing to work on publishing videos focused on Intelligent Series, Infinity O/C Scheduler, MDR and more.

Webinars

2018 was another great year of bi-weekly educational, operational and technical webinars. Thank you to all of our webinar presenters and hosts! Webinars continue to be an important resource for NAEO members and the PDC is working hard on the 2019 schedule. Keep an eye on the ListServ and the NAEO Website for updates.

Summer Series 2018

July 23-25th, 2018 we held our Annual Summer Series in Chicago, IL with an unprecedented 65 attendees! This year we offered an IS Beginner/Intermediate track, IS Intermediate/Advanced track and the first ever Summer Series Supervisor Leadership track. The knowledge, experience and willingness to help of our instructors Marie McGuire of AnswerTel, Kaylin Cowherd of Advanced Answering Center, Jaimie Guidry of Dexcomm, Rob Beattie of AnswerPlus and Julie Sparklin of Main Line TeleCommunications was more than amazing! We would also like to thank Amtelco for lending us the talents, knowledge and assistance of Michael Quimby and Jordan Beale. And of course thank you to our sponsors Amtelco & NotifUs! Conveniently located next door, this year we headed to Gino's East for some traditional Chicago-style deep dish pizza! It was another great evening filled with lots of food, laughs, networking and writing on the walls – a Gino's East tradition!

We are hard at work developing the 2019 Summer Series, which is headed back to Atlanta July 22-24th, 2019. The IS classes will be split again into two tracks, I.S. 101 (formerly IS Beginner/Intermediate) and I.S. 102 (formerly IS Intermediate/Advanced) and we will also offer the Supervisor Leadership track again this

year. The committee has also been working hard on adjusting the content of both I.S. workshops to include even more Contact Based Architecture and Contact Based Dispatching as requested. Some of the content from the I.S. 101 track is going to be moved to the Professional Development Library (for example: info pages, linking accounts, etc) so that attendees can dive right into scripting the first day!

Advanced Technical Workshop

The 2019 Advanced Technical Workshop is being held Sunday, March 10th. This year our topic is "Scripting with MergeComm 101". MergeComm is one of Amtelco's newest applications that can add automated dispatching capabilities to Amtelco's Intelligent Series platform based on inbound triggers such as an email, SMS or miSecureMessage. Covered topics will be: scripts involving auto dispatch, scheduling MergeComm jobs, inbound email/SMS/WCTP, automatic testing of SMS/Fax/Email, API integrations, IS Web triggers and more.

The PDC continues to have a strong core of highly motivated and dedicated members. This year we welcomed new committee members and continue to extend an open invitation to you. We're always looking for webinar ideas, webinar presenters, and assistance with our workshops. Please email professionaldevelopment@naeo.org with your ideas, feedback to volunteer to present on a topic, or to join the committee. We'd love to have you join us!

Finally, I'd like to thank all of our member companies that have lent us their star employees. A huge thank you to this year's committee members for volunteering your time, talents and efforts to benefit the NAEO membership. I can't thank you enough for all of your commitment and hard work. It's been an honor and absolute pleasure working with all of you!

Committee Members 2018

Jaimie Guidry, PDC Vice Chair; **Deborah Anders**, Educational Contributor; **Ashley Andersen**, Educational Contributor; **Mike Burkinshaw**, Educational Contributor; **Taylor Fawks**, Educational Contributor; **Michael Goumas**, ATW Instructor; **Jamie Hay**, Educational Contributor; **Tifani Leal**, Webinar Assistant; **Jason Miller**, Educational Contributor; **Marie McGuire**, IS Instructor; **Michael Quimby**, Amtelco Liaison; **Adrian Trevino**, Educational Contributor; **Justin Wiggins**, Educational Contributor



SUBMITTED BY:

ALANA NIKIFORUK,
PDC Chair

COMMUNICATIONS REPORT

The primary goal of the Communications Committee is to keep our members up to date about what is happening within NAEO. We do this through a few channels: NewsLinks and Social Media.

Our primary communication is our publication, NewsLinks. We do our best to get this out on a monthly basis. Content consists of inspirational quotes by Gary Blair, articles from Amtelco's David Drenk and committee reports, to name a few. We also get some great technical articles written by two of our talented members, Kevin Procter and Michael Goumas.

On the Social Media side of things, we primarily use Facebook and Twitter. Our NAEO Facebook page has really taken off! The page gets updated several times per week to keep members engaged. It's a fun way to learn about upcoming events, reminisce over photos from years past and even to see who has the cutest office dog or cat. We generally see an increase in our page visits prior to and just after our annual conference and our Summer Series Workshops.

Our committee is always looking for new content and fresh ideas. So, if you have a story, a thought or just want to highlight your writing talents, please consider submitting an article or joining the committee! We can always use an extra hand.

I'd like to give a heartfelt "thank you" to Kaylin Cowherd, Jamie Hay, Brian Doherty and Alana Nikiforuk for your dedication to NAEO and the Communications Committee. Thank you for all you do!



SUBMITTED BY:

Rob Bennett,

Communication Committee Chair

NAEO — DID YOU KNOW?

In 1988, Joe Everly and John Morley of Amtelco debuted a brand new concept in telemessaging, a PC-based open architecture system called PCMX. This paperless messaging system included an integrated voice mail system, allowing owners to enjoy the efficiencies of maintaining a single system. The users of both PCMX and EVE joined forces and renamed the organization National Amtelco Equipment Owners, maintaining the NAEO name.

In 1993, Amtelco introduced its new Infinity system, which integrated paperless messaging and voice processing with a significantly larger account capacity. It continues to be Amtelco's premier product today.

In 2003, the Intelligent Series module was added to the Infinity platform offering script-based message services — a major development in the industry. NAEO continues its tradition of working closely with Amtelco to make all of the Amtelco product offerings as strong and valuable to the industry as possible.

Current members of NAEO are composed of EVE and Infinity users. The organization now includes a combination of owners, managers, IT specialists, and others who work closely with the Amtelco equipment to ensure a smooth-running call center.

NAEO BOARD OF DIRECTORS

PRESIDENT Ian Cooke

Answer 365 | Halifax, NS Canada | president@naeo.org

PRESIDENT-ELECT / COMMUNICATIONS COMMITTEE CHAIR Robert Bennett

Bennett Answering Service | Flint, MI | presidentelect@naeo.org | communications@naeo.org

PAST PRESIDENT Lina Cunningham

Extend Communications, Inc. | Brantford, ON Canada

SECRETARY/TREASURER JoAnn Fussell

Voice Link of Columbus, Inc. | Columbus, GA | secretary@naeo.org

MEMBERSHIP COMMITTEE CHAIR Tifani Leal

A1 Professional Answering Service, Inc. | Lafayette, LA | membership@naeo.org

PROFESSIONAL DEVELOPMENT COMMITTEE CHAIR Alana Nikiforuk

Intercon Messaging Inc. | Drayton Valley, AB Canada | professionaldevelopment@naeo.org

HEALTHCARE USER GROUP COMMITTEE CHAIR Rossi Fraenkel

Allina Health | Minneapolis, MN | rossi.fraenkel@allina.com

CONFERENCE COMMITTEE CHAIR Adrian Trevino

Personalized Communications, Inc. | Duncanville, TX | conference@naeo.org

FUTURE DIRECTIONS COMMITTEE CHAIR Jason Miller

Southern Voices, Inc. | Winston Salem, NC | futuredirections@naeo.org

EXECUTIVE DIRECTOR Gigi Sutton

NAEO | Chicago, IL | management@naeo.org

2020 ANNUAL CONFERENCE

— SAVE THE DATE —

MARCH 15-18, 2020

Details coming soon at naeo.org