

#1

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, October 31, 2023 12:41:28 PM  
**Last Modified:** Tuesday, October 31, 2023 2:53:46 PM  
**Time Spent:** 02:12:18  
**IP Address:** 206.196.158.130

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**Q1**

Please provide the following information

Award Contact Name	<b>Brad Dietz</b>
Company	<b>Per Mar Security</b>
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**Q2**

**Respondent skipped this question**

Which Monitoring Center of the Year category are you entering?

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**Q3**

**TRAINING AND EDUCATION** - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

All new hires work one on one with a Monitoring Center Shift Training Specialist. The new hires are with that trainer for 3 weeks. We have a detailed training outline that each trainer follows to make sure all items are covered and all new agents are trained in the same outline. Granted not all new hires learn in the same way.

All of our training staff are long term employees with many years as operators & shift leads. They all competed with others and earn their roles. The training staff also completed a Train the Trainer course through Fred Pryor Seminars this past year.

We also use Docebo as our LMS. We have multiple courses regarding soft skills & basic customer service. We have also created multiple level tests that our agents complete thorough out the course of a few years. These courses cover basic dispatch to advanced items we handle here in the monitoring center. And of course all agents are entered in the TMA courses at set times in their training and should be completed with TMA level 2 by 90 days. We also do the recertification of all agents in the time required by tma.

Regarding incentives programs we implemented this year. Not only do the trainers get an hourly incentive for their direct time training they also get a bonus at 60 and 90 days if that new hire continues employment with us. In order to earn that bonus they need to check in daily with the trainee, review calls, complete reviews of progress and keep the supervisors informed of all progress.

All supervisors and Assistant supervisors were enrolled in Peer to Supervisor training.

All supervisors & Management were enrolled in a local community college course Front Line Leadership

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#### Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

Attached copy.

also we do quarterly in the MC we preform an emergency check to make sure all numbers and contacts are valid in a book we have at our supervisor/ lead station so if they need to vacate they can grab that book and know what to do

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#### Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

Monitoring center - We use multiple data analytics to make sure we are staffed correctly, alarms are being handled in a timely manner and that all receivers are communicating as expected. to name a few.

Customer support - we are regularly providing customers access to their own data so they can test or make account updates without having to call in. We have updated our phone system to a cloud based system that will give us access to things like Chabot's and automated collections. We use freshdesk as our ticketing system to make sure customer are responded quickly and professionally.

Training - our Docebo LMS we have recently moved forward with a 30000 course library which will give even more access to training tools in 2023 & beyond.

Marketing - we made a huge push for text/emailing customers on low priority alarms, pushing notifications via email, newsletters, and mailers. Texting customers on low priority alarms has made major change in the flow of alarms to live agents.

HR oversees our docebo LMS and they have made some major investments in time and money to enhance this product.

Accounting. We have moved to a new phone system that will give us the ability to automate collections efforts giving our support staff and accounting staff more time to focus on other pending items.

End users/subscribers. With the advancement of text and email notifications this will eliminate excessive agent interaction with low priority events. Customer can view their text and address when they can.

We also push toward customers accessing their accounts in apps or online so they can bypass calling in and they can test their systems at the touch of a button

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#### Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

for false dispatch on burglar alarms we do two call verification on all customers and in some areas we have added a 3rd call for verification before sending police.

We make sure out install techs provided detailed training once the install is complete.

On our videofied solution we have Calipsa monitoring the events before they even make it to operators which has greatly reduced false positives from hitting agent screens.

We have moved more and more in to Camera or video verification solutions and we are expanding that more and more.

Identifying offenders we have reports daily that share alarm volume and we will reach out to sales or contact customers directly depending on situations.

Training as mentioned aboved our agents all go through a through training and look out for issues and they will contact our repair or support staff to make system adjustments or repair orders

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## Q7

COMMUNITY ACTIVITIES - Detail how you help employees engage in community activities and causes. (10%)

To name some of the local community events we both sponsor and are very involved with.

-LeadHer sponsorship event, we had this in our parking lot with food truck and free food for employees, made shirts also

-Well Suited Embrace race table and luncheon sponsor multiple employees matched with local youth to share life experiences

-Charity committee fund employees contribute and the company matches

-Junior achievement, bowlaton & trivia nights employees will create teams and join in the fun

-Hand n Hand Chilli cook-off (HNN empowers Children and adults with disabilities to have the same opportunities for fun and learning)

we complete with who makes the best chilli and we run a table and multiple employees volunteer

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## Q8

METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)

With the advancement of video verification we are reviewing daily the volume of alarms some sites are sending in. We are in contact with sales and customers depending on how those alarms come in.

We monitor stats on what agents handle vs the automation.

response time on emergency alarm.

We review daily all UL alarms to make sure we are in compliance

Daily call volume and speed to answer we look for 90% in 60 seconds or less answered.

We also run daily shift reports that track things by hour of the day, number of agents at that time. any alarm responses and actual alarms

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## Q9

EMPLOYEE RECOGNITION - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

We do various things related to employee recognition. each shift will run a monthly incentive things no missed calls, attendance in a certain window response times X we will order in food for that shift.

have 5 categories each month and if you get had something like highest calls or volunteered for a duty and various others you get entered in a drawing for cash in hand.

we have daily goals that earn points and if you complete individual items you get a point or team items the whole team gets points.

that earns a gift card to a local restaurant or something like amazon.

birthday cards, anniversary cards.

to name a few of the things we do.

Employee referral bonus \$350 total.

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### Q10

QUALITY OF RECORDS (Alarm history, recordings, etc.) - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

Record retention. our monitoring software maintains storage of all alarm and agent activity for 7 years related to customer alarm traffic. As a company we maintain individual agent data related to things call volume and alarm handling volume, talk time, speed to answer etc... forever.

There are many times we will look at last year, last week or the year before to see where we are today as far as things like call volume & alarm traffic.

One of the largest things today we are looking at is agent involvement vs automation and no agent involvement.

We also categorize things like Burglar received vs dispatched, monitored customers this month vs last.

We use the multiple tracked records to see challenges, productivity on groups or agents were we are really doing great things.

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### Q11

RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)

This was an eye opener for me. I recently moved in to this roll just over a year ago replacing a 45 year tenured monitoring center manager. I did not even think about getting more directly involved with AHJ's until this section.

Our installations managers and service managers all have very close working relationships with ahjs. Our local sales and operations staff deliver lunch to local public safety groups, and meet with them regularly.

Donated to them monetarily

However the monitoring center until reading this question had no thoughts of being involved directly.

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### Q12

BUSINESS STRATEGY/CUSTOMER RELATIONS - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)

In the monitoring center we really want our agents to focus on dispatch, however the few things we really try and voice to the customers are text or email of low priority events vs phone calls. The other we try to voice is access to an app to put your system in and out of test. The customer can also check alarm activity and make call list/ passcode updates though the online service.

Most of or communication with customer fall to our Marketing and Customer Care & Inside Sales staff. They are always looking for ways to contact customers using bulk mailers, email & phone calls to talk about things like phone lines or other system updates

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### Q13

ENGAGEMENT WITH INDUSTRY GROUPS - Identify relevant industry association memberships that you center maintains. How does your company participate in or contribute to these associations? (5%)

Our CIO is on a TMA committee. I emailed to try and join a committee

Or COO is on multiple boards including NetOne

NFPA

UL

FM

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## Q14

### ADDITIONAL INFORMATION

Per Mar is celebrating their 70th year in business this year. We have been a member of TMA and the Alarm Industry for many years and I don't see we have ever won this award.

I kind of mentioned above that the monitoring center recently replaced a retiring monitoring center manager who had been in her position for 45 years.

She ran an amazing team, and though all the adversity with changing leadership this Monitoring Center crew maintained smiles on their faces, they worked hard while short staffed, they embraced all my wild ideas and they shined brighter then ever!

Our employee referral jumped.

Leaders were allowed to lead and they have made this a great environment!

Monitoring center is now more involved then ever in company events, the supervisors are excited to come in and are empowered to make changes or seek out ways to improve which has lead to some exciting changes.

Of course I am biased. Being apart of & knowing this team they would be so excited to know they were even considered to be Monitoring Center of the year out of all other monitoring centers involved.

They truly deserve a win!

Thank you for your consideration

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## Q15

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

**DisasterRecoveryPlan2023.docx (489.2KB)**

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#2

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, February 06, 2024 1:08:24 PM  
**Last Modified:** Tuesday, February 06, 2024 1:12:58 PM  
**Time Spent:** 00:04:33  
**IP Address:** 206.108.31.34

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**Q1**

Please provide the following information

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**Q2**

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

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**Q3**

TRAINING AND EDUCATION - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

At TELUS, we have established a structured training and career ladder known as the Agent Life Cycle. This life cycle consists of four levels: Junior Monitoring Specialists, Regular Monitoring Specialists, Senior Monitoring Specialists, and Expert Monitoring Specialists. Currently, we have over 170 monitoring agents at various levels within this life cycle.

To support our team members' training and development, we have designed a curriculum that is segmented to ensure learning and growth occur in a structured environment. Each segment focuses on a specific area of the monitoring business, allowing agents to master it before progressing to the next level of knowledge, skills, and responsibilities. This controlled progression ensures better integration of team members, promotes expertise, enhances knowledge retention, increases employee retention, and ensures equitable growth for all.

New hires undergo 13 days of instructor-led classroom training, followed by hands-on experience on the floor as soon as possible. The training curriculum includes practice modules and simulations to familiarize new hires with the types of calls and situations they will encounter. Trainers demonstrate real alarm treatments, and quizzes are conducted after each module to evaluate understanding. Throughout the training period, trainers provide evaluations for the managers to review. On the last day of training, new hires handle real alarms in an academic environment with the support of trainers or experienced agents. After training, they are paired with a Subject Matter Expert (SME) who listens to their calls and provides support for three days, ensuring they are ready to handle calls independently.

During each level of the Agent Life Cycle, agents spend a minimum of six weeks practicing the material covered in training, handling alarms and scenarios at that level. After the practice period, they undergo evaluations based on the quality and efficiency of their alarm treatments or inbound calls. Supervisors conduct coaching sessions with specific topics to ensure agents' success. If an agent fails the evaluation, we provide additional support to help them succeed in a retake. Successful completion of Level 2 (Regular) training and holding a TMA certification is a requirement to maintain employment with us.

Coaching is an integral part of our culture at TELUS. We aim to create a coaching culture where team members unlock and leverage their potential, leading to greater individual and business impact. Coaching sessions occur monthly and consist of conditioning sessions, professional development sessions, and quality assurance sessions. Conditioning sessions focus on performance results and utilize internal coaching tools to identify gaps in knowledge, presenting agents with areas requiring additional training. Professional development sessions concentrate on personal and professional goals, recognizing individual achievements. Quality assurance sessions involve leaders conducting active listening sessions, performing evaluations, and reviewing customer feedback to provide team members with feedback for development and recognition. This feedback guides leaders in providing necessary support, such as training or creating individual action plans.

Our trainers possess years of hands-on experience as monitoring agents before transitioning into a training role. They are selected based on aptitude, judgment, knowledge, and a passion for developing skills in others. Trainers must complete the TELUS certification program, which involves reviewing the training plan and modules, participating in new-hire training as a participant and training assistant, studying the modules, and delivering training content alongside experienced trainers. They must deliver at least 90% of the content in the next new hire class and co-facilitate complex topics. Finally, they deliver the full training with an experienced trainer to obtain official certification as a trainer.

At TELUS, we foster a pay-for-performance culture that serves as a powerful incentive for our team members to develop, grow, and excel in their roles. We believe in recognizing and rewarding exceptional performance and aligning individual achievements with organizational success. Through our performance-based compensation structure, we provide tangible incentives that motivate our team members to go above and beyond, continually improving their skills and delivering outstanding results. This culture of meritocracy empowers individuals to take ownership of their professional development, driving a sense of purpose and engagement. By valuing and rewarding exceptional performance, we cultivate a high-performing workforce that thrives on continuous improvement and contributes to our collective success.



## Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

TELUS has implemented a comprehensive and sophisticated disaster recovery solution that encompasses multiple layers of protection. This solution comprises three key components: geographic and systems redundancy, disaster mitigation and recovery playbooks, and coordinated response teams.

To ensure uninterrupted service in the face of potential disasters, TELUS has strategically established multiple sites across Canada, spread geographically and designed to be redundant to one another. This means that crucial systems such as telephony, customer relationship management, and alarm monitoring have full backup capabilities, safeguarding against any disruptive event. For example, TELUS relies on multiple telecommunications vendors and network paths, reducing dependence on any single provider or network. Additionally, each site is equipped with generators and Uninterrupted Power Supplies (UPS) to ensure a continuous supply of electricity, even during prolonged disaster situations.

At TELUS, we are dedicated to seamlessly integrating our disaster recovery plan into the fabric of our day-to-day business operations. This integration goes beyond a mere acknowledgment of the plan's existence. It involves the deliberate infusion of disaster recovery procedures and protocols into our routine activities and processes. By seamlessly embedding these practices into our regular workflow, we ensure that our team members become intimately acquainted with the necessary actions and responses, enabling them to operate with greater proficiency and preparedness in the face of any potential disaster.

We place immense importance on conducting periodic testing and evaluation of our disaster recovery plan to ascertain its effectiveness and identify areas for improvement. Through meticulous evaluation processes, we subject the plan to simulated disaster scenarios that closely mimic real-world incidents. This allows us to gauge the response mechanisms, scrutinize the plan's performance, and gain invaluable insights. By collecting feedback from our team members who participate in these tests, we gather a wealth of knowledge that empowers us to refine the plan, rectify any shortcomings, and elevate our overall state of readiness.

We have developed meticulous disaster mitigation and recovery playbooks that serve as comprehensive guides for responding to various scenarios. These playbooks contain detailed information about system owners, vendor contacts, site primes, and communication templates, enabling swift and effective responses to mitigate and recover from disasters and outages. Following each significant incident, TELUS conducts a thorough Post-Incident Review to identify any gaps and document valuable lessons learned. This ongoing process allows TELUS to continuously improve its playbooks and better prepare team members involved in the response. One of the tactics employed in these playbooks is the activation of pre-programmed call center changes to prioritize the handling of critical alarm signals over other inquiries, such as billing-related matters.

Disaster recovery planning is not a static endeavor, but an ever-evolving process. At TELUS, we have embraced the concept of continuous improvement as a fundamental aspect of our disaster recovery strategy. We consistently scrutinize and update our plan to reflect advancements in technology, changes in our business operations, and emerging threats. By diligently examining the lessons gleaned from both training exercises and real-world incidents, we strive to fortify the plan's effectiveness and adaptability. This commitment to ongoing improvement ensures that our disaster recovery measures remain agile, robust, and aligned with the evolving landscape of potential risks.

TELUS relies on coordinated response teams that vigilantly monitor operations around the clock. These teams promptly engage the appropriate stakeholders whenever a system or site experiences an outage, ensuring that the necessary actions are taken to address the situation effectively. In addition, these response teams are on standby to swiftly respond to events with advance warning, such as major storms. To maintain preparedness, regular mock exercises are conducted by these teams on a monthly basis. These exercises help keep the team members well-versed in the response protocols and ensure that processes are continuously updated to reflect evolving circumstances.

## Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

At TELUS, the utilization of technology is integral to our pursuit of operational excellence and business intelligence across multiple domains:

### Monitoring Operations

Our real-time Tableau reports empower operations managers with actionable insights on contact center performance, including wait times, service levels, and live alarm buffers. By analyzing trends and current conditions, these dynamic dashboards enable swift decision-making and provide a visual representation of daily performance. Through weekly and monthly operational reports, we maintain a comprehensive overview of our operations, ensuring that teams remain on track to meet service level and quality targets.

We have had a dedicated team focused on increasing alarm automation from 33% in December 2022 to an outstanding 59% in October 2023, representing a significant boost of 2,600 bps, which has resulted in substantial annualized OPEX savings of \$1.5M. The implementation of alarm automation through technology has brought about a significant transformation in our response times. By handling signals automatically, it has alleviated our agents of repetitive tasks, allowing them to redirect their attention towards priority alarms. The year-over-year statistics paint a vivid picture of this improvement: for high-priority alarms, we've seen a remarkable increase in service level achievement from 76% in FY 2022 to an impressive 83% in Nov YTD, marking a gain of 700 basis points. Meanwhile, medium-priority alarms have surged from 83% to an outstanding 94%, reflecting an even more substantial gain of 1,100 basis points. Low-priority alarms have shown a leap from 82% to a staggering 95%, an increase of 1,400 basis points. Moreover, the response times have seen an equally striking transformation. High-priority alarms have experienced a dramatic reduction from 61 seconds in FY 2022 to an astonishing 24 seconds in Nov YTD, marking a significant drop of 37 seconds. Medium-priority alarms have witnessed an even more staggering decline, plummeting from 927 seconds to 216 seconds, a remarkable decrease of 711 seconds. Finally, low-priority alarms have undergone an astonishing transformation, plummeting from 6,123 seconds in FY 2022 to an incredible 1,067 seconds in Nov YTD, a reduction of 5,056 seconds. This shift not only reflects improved efficiency but also showcases the substantial impact that alarm automation has had on our operations.

We also introduced an 'abort by zone' initiative, leveraging technology in our monitoring software, resulting in a reduction of 9,000 alarms monthly.

We've streamlined our internal process for dispatching guards in response to alarms through automation, significantly reducing the effort required from our agents. Previously, agents had to manually dispatch guards, involving the completion of time-consuming forms that took several minutes. This year, with the integration of our technology, agents can dispatch a guard with just a simple click within their software. This transformation has made the entire process much more efficient, turning minutes into mere seconds.

### Customer Support

To track key performance indicators and measure agent call center performance, we employ integrated data and scorecards within Tableau. Additionally, we leverage automated email surveys and customer feedback to gauge satisfaction, measure repeat calls, and assess first-call resolution. These data-driven insights enable managers to swiftly identify areas for improvement, ensuring an optimized client experience.

### Training

Through our Verint platform, all agent calls are recorded to support quality coaching and training initiatives. Managers and trainers utilize this application to closely observe frontline agents' customer interactions, aiming to continuously enhance their handling of calls and adherence to proper procedures. Furthermore, our internal feedback and development tool, Echo, facilitates prompt coaching and feedback delivery, enabling leaders to provide valuable guidance to agents.

### Sales & Marketing

TELUS harnesses diverse data sources to gain an in-depth understanding of customer behavior and build churn models utilizing artificial intelligence and machine learning. These models enable proactive identification of customers at higher risk of churn, allowing us to implement targeted retention campaigns and reduce cancellations of security services. Additionally, our churn mapping capabilities enable us to pinpoint issues related to monitoring services in specific geographies or segments, empowering operational

managers to coach operators and refine processes.

#### Accounting

By meticulously tracking customers and monitoring costs, extracted from billing systems and SAP respectively, we ensure precise matching of revenue and expenses. This comprehensive understanding of our cost structure facilitates identification of areas for operational efficiency, optimizing our cost management and resource allocation.

#### HR

In our commitment to streamline and expedite hiring processes, TELUS utilizes the advanced business intelligence capabilities integrated into our Human Resources portal. This platform accelerates and simplifies hiring procedures, offer management, approvals, and onboarding. Additionally, the portal provides real-time reporting, offering TELUS users invaluable insights into hiring progress and statistics, ultimately enhancing our talent acquisition initiatives.

#### End User Experience

The end user experience is greatly enhanced by the features offered through Alarm.com. With the ability to remotely control and monitor their security systems, users enjoy convenience, peace of mind, and a heightened sense of security. The alarm cancellation feature empowers users to address false alarms promptly, reducing unnecessary disruptions and costs. Additionally, features such as video verification and two-way voice provide an extra layer of assurance and enable effective communication with monitoring professionals. Alarm.com's user-centric approach ensures a seamless and user-friendly experience, promoting customer satisfaction and confidence.

We launched the ADC In-App Cancel feature for our customers in mid-May, which allows customers to self-serve alarm cancellations, enhances the customer experience and reduces operational costs simultaneously. The introduction of the Alarm.com in-app cancel feature reflects a commitment to reducing customer effort. 314K security customers now have the convenience of canceling alarms with a single click, enhancing their overall experience and keeping them informed about their alarm system. This instills confidence in our service and strengthens the bond between TELUS and its customers. The impact has been significant, as evidenced by the impressive figures: year-to-date, a total of 1,871 hours have been saved, with an annualized estimate of 9,858 hours. This not only demonstrates the tangible benefits of the new feature but also underscores our unwavering commitment to enhancing customer satisfaction and efficiency in every possible way.

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## Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

TELUS upholds alarm procedures that adhere to industry guidance, CANASA, ULC, and feedback from Authorities Having Jurisdiction (AHJs), prioritizing exceptional service to customers while considering operational and industry requirements.

Employing advanced processes and technology, TELUS has implemented various measures to mitigate false dispatches. These include alarm cancels, enhanced call verification, video verification, two-way voice, and the implementation of "double knock" requirements, wherein action is taken only when two signal events occur within a specific timeframe. TELUS has also integrated electronic alarm cancellation capabilities, such as through the alarm.com mobile app, empowering customers to promptly address false alarms and alleviate the burden on operators. Electronic dispatch protocols are likewise leveraged to expedite the dispatching of mobile guard response services.

In addition, TELUS has established a comprehensive False Alarm Reduction (FAR) program, successfully reducing the volume of signals by 750,000 in 2022 and an additional 58,300 in 2023. This achievement was realized through various initiatives, including analyzing accounts associated with excessive alarm signal generation, prioritizing these accounts, training frontline agents to assess them, and engaging with customers to provide education on alarm best practices and resolve technical issues. For cases that require on-site assistance, technicians are dispatched. The FAR program effectively achieves three objectives: reducing false alarms at the source to alleviate operational pressures, enhancing the customer experience for TELUS security customers, and diminishing the strain on emergency services by avoiding unnecessary dispatches, thus bolstering first responder availability for genuine emergencies. TELUS has received numerous expressions of gratitude from customers who appreciate the proactive approach and support in reducing false alarm occurrences.

Additionally, with Alarm.com, end users have the convenience and control to cancel alarms directly from their mobile app, resulting in a streamlined process that reduces the need for monitoring station involvement. This feature empowers customers to quickly and easily address false alarms or accidental triggers, avoiding unnecessary dispatches and associated costs. By allowing users to take immediate action through the app, Alarm.com enhances the customer experience, providing a sense of empowerment and reducing potential frustrations. This functionality not only improves efficiency and response time but also strengthens the overall security ecosystem, fostering a more seamless and user-centric approach to alarm management.

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## Q7

### COMMUNITY ACTIVITIES - Detail how you help employees engage in community activities and causes. (10%)

At TELUS, we prioritize community engagement and encourage our employees to actively participate in various charitable activities and causes. Our commitment to giving back is deeply ingrained in our company values, which emphasize putting customers and communities first. We firmly believe in making our communities stronger and healthier, and we leverage the power of our technology to create positive social outcomes.

To facilitate community involvement among our employees, we have established a dedicated committee within our Central Alarm Monitoring teams. This committee works diligently to organize, promote, and actively participate in community giving events throughout the year. Our aim is to host at least one community event per quarter, providing our employees with meaningful opportunities to make a difference.

In 2023, we have accomplished several noteworthy community initiatives. Early in the year we conducted a successful Food Bank Drive across multiple locations including Calgary, Montreal, Vancouver, Ottawa, and Victoria. With the participation of 160 employees, we raised \$515 to sponsor lunch, prepared breakfast and lunch for 210 individuals, and packaged over 3,000 pounds of food.

In the spring, we organized a Spring Cleaning with a Meaning campaign, involving 422 employees in locations such as Calgary, Montreal, Vancouver, Ottawa, and Victoria. This initiative aimed to make a positive impact by encouraging employees to contribute to meaningful causes through their time and efforts.

Just before the new school year, we planned a School Supply Drive event, with 103 participants and \$2400 in donations to support educational initiatives and empower students to achieve their goals.

Finally, in December we hosted 12 Days of Kindness, where we encouraged team members to give back to their community for the first 12 days of December, in a way they felt was meaningful. Some members shoveled snow for their neighbours, others volunteered at the local SPCA, and some team members contributed to fundraising efforts for families in need over the holidays.

In 2023, our commitment to community engagement and employee participation was exceptionally strong. During the TELUS Days of Giving campaign, an impressive 95% of our team members actively participated, collectively contributing over 8,000 hours of volunteer time, where the team was recognized as TELUS Social Purpose Champions. This remarkable level of involvement demonstrates our employees' genuine dedication to giving back and making a positive impact in their communities.

By embracing these initiatives, our employees are empowered to engage in community activities and causes close to their hearts. Through their collective efforts, we continuously foster a culture of philanthropy, making a tangible difference in the lives of others and creating stronger, more resilient communities.

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## Q8

**METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)**

KPIs and data reporting play a crucial role in managing day-to-day operations and driving performance excellence within our Central Alarm Monitoring (CAM) teams. These metrics enable us to measure agent productivity, performance, and the achievement of business goals that ultimately contribute to delivering exceptional customer service.

The availability of these KPIs and data reports allows leadership to gain valuable insights into team members' operational performance and their ability to meet customer needs and expectations for a high-quality experience. These metrics are regularly reviewed in-depth during Monthly Coaching Conditioning sessions between team members and their leaders.

The following KPIs are reported on a daily or weekly basis, enabling management to effectively manage their teams and maintain service levels:

1. **First Alarm Resolution:** Measures the average number of fire and burglary alarms where agents successfully prevent repeat alarms within the threshold, demonstrating their ability to resolve issues effectively.
2. **Quality Evaluation:** Assesses the average score from team manager-driven evaluations of agent work quality, providing insights into adherence to established standards.
3. **Efficiency Evaluation:** Evaluates the average score from team manager-driven evaluations of agent efficiency and tool usage, highlighting opportunities for improvement and optimal resource utilization.
4. **Average Handle Time:** Tracks the average duration of incoming calls, helping to optimize call handling processes and ensure efficient customer interactions.
5. **Customer Top2Box Survey:** Measures customer satisfaction during interactions, with a score of 89.43% indicating that a significant proportion of customers surveyed rated our monitoring service as "Excellent" or "Very Good," underscoring their likelihood to recommend it to others.
6. **Team Member Engagement:** Assessed yearly through the Pulsecheck survey, team member engagement is a vital metric that provides insights into the overall satisfaction and commitment of team members. The Monitoring team has achieved world-class engagement results, with an 82% engagement score and 91% team member survey participation in October 2023.

In addition to these CAM-specific metrics, operational contact center KPIs are also monitored on a daily and real-time basis. These include:

**Service Level:** The threshold within which all calls and alarms should be answered and processed, ensuring timely and efficient service delivery.

**Alarm Volume:** The number of alarms handled, reflecting the overall workload and operational demands.

**Longest Alarm Waiting (LAW):** Tracks the longest waiting time for an alarm, aiding in identifying potential bottlenecks and opportunities for optimization.

**Average Speed of Answer (ASA):** Measures the average time it takes for calls and alarms to be answered, ensuring prompt response times.

**Calls Offered:** The number of calls that reached the queue, indicating the volume of customer interactions.

**Percentage of Calls Abandoned:** Reflects the proportion of calls that were abandoned by customers, providing insights into customer satisfaction and service levels.

**Percentage of Calls Transferred:** Measures the rate at which calls are transferred to other departments or agents, highlighting potential areas for improvement in first-call resolution.

Churn: Tracks customer attrition rates, enabling the identification of trends and potential areas for customer retention efforts.

Scheduled Frontline Hours and Load Factor: Evaluates the scheduled hours for frontline agents and their workload, ensuring optimal resource allocation.

Occupancy: Measures the percentage of time that agents spend actively handling customer interactions, optimizing productivity and workload management.

By monitoring and leveraging these KPIs and data reports, our day-to-day operations are effectively managed, enabling us to drive performance, ensure customer satisfaction, and continuously improve our service delivery.

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## Q9

**EMPLOYEE RECOGNITION** - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

At TELUS, recognizing employee excellence is a vital aspect of our culture and is supported through various programs and initiatives. Our comprehensive recognition program encompasses four pillars: Compensation, Team Member Awards & Recognition, Recognition through Bravo, and Industry Awards & Recognition.

Under the Compensation pillar, we follow a "pay for performance" approach that rewards team members based on their individual contributions and achievements. This merit-based philosophy ensures that compensation and performance bonuses are aligned with goals and values assessments. We offer a 5% performance bonus target to all frontline positions, promoting a culture of recognition for exceptional performance.

The second pillar, Team Member Awards & Recognition, includes aspirational employee awards such as promotions and lateral moves. For example, our Leading Stars program recognizes team members who consistently excel in their roles and demonstrate TELUS values. Additionally, the Customers First Champions Award acknowledges exceptional customer-facing team members who consistently deliver exceptional experiences. Leadership Values in Practice (LVIP) Awards, Connections Honors Leaders of Excellence (CHLOE) Awards, and Zenith Awards further celebrate role models and exceptional contributions within our team.

The third pillar, Recognition through Bravo, is a corporate tool that facilitates meaningful recognition across the organization. With Bravo, leaders and peers can easily extend recognition through Bravo cards, points, or award nominations. This tool fosters a culture of appreciation and aligns recognition to our core values and strategic priorities. In 2023, our Central Alarm Monitoring team members were awarded 3.2 million Bravo points, totaling \$32,000 in recognition rewards.

Furthermore, we value external recognition and industry awards. Being voted Canada's Most Trusted Alarm Service by BrandSpark two years in a row and winning Stevie International Business Awards and Stevie Awards for Customer Service Department of the Year highlights our team's achievements and the positive impact we make in the industry.

These recognition programs and initiatives play a crucial role in motivating and acknowledging our team members' excellence in productivity, quality assurance scores, attendance, and more. They foster a positive work environment, encourage personal and professional growth, and contribute to our overall success as a team.

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## Q10

**QUALITY OF RECORDS (Alarm history, recordings, etc.)** - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

At TELUS, we have a robust records retention process that ensures the preservation of alarm history for 7 years and voice recordings of phone calls for 3 years. These records serve as a valuable resource for evaluating current challenges, assessing productivity, and measuring effectiveness.

By analyzing the alarm history data, our team of data analysts can establish baseline alarm volumes and identify any emerging challenges or trends. This information is instrumental in our forecasting activities, allowing us to schedule our team members effectively and meet our target service levels across different intervals. Additionally, unexpected spikes in signal volume are closely examined to uncover potential process gaps that may require further investigation and resolution. This analysis helps us refine our operations and enhance efficiency.

The alarm history and voice recordings also play a crucial role in quality monitoring. Our management team utilizes this data to assess the level of service and adherence to quality standards provided to our customers. It guides our agent coaching and performance assessment activities, enabling us to continuously improve the customer experience. Furthermore, the historical data helps us gauge customer sentiment and understand their satisfaction with the service they receive from our monitoring team members. This feedback is essential for our customer-centric approach and drives our efforts to consistently deliver exceptional service.

One specific example of leveraging historical data is our First Call Resolution program. By analyzing the patterns and trends in alarm and phone call history, we gain insights into the reasons behind customer contacts. This understanding allows us to make informed changes to our Interactive Voice Response structure and continually optimize our processes. The goal is to maximize the number of customers who can have their inquiries resolved with just one phone call, eliminating the need for additional transfers and enhancing overall customer satisfaction.

In summary, the retention and analysis of alarm history and phone call records enable us to evaluate current challenges, drive productivity, assess effectiveness, and understand the needs of our customers and employees. These insights empower us to make data-driven decisions, improve our operations, and provide exceptional service to our valued customers.

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## Q11

RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)

We recognize the importance of collaboration with public safety agencies and the need for dedicated support in this area. Within our Central Alarm Monitoring team, we have established a specialized group called the Agency & Monitoring Support (AMS) team. This team is responsible for fostering strong relationships with Authorities Having Jurisdiction (AHJs) across Canada.

The AMS team actively engages with AHJs to maintain open lines of communication, ensuring that we can better serve our customers. Through regular interactions, we share concerns, practices, and insights to collectively minimize false alarms and improve the overall effectiveness of our operations. The team works closely with AHJs on matters such as permitting, bylaw amendments, and identifying problematic trends in order to proactively address potential issues.

Furthermore, the AMS team plays a crucial role in knowledge dissemination. They ensure that any feedback, learnings, or best practices shared by AHJs are effectively communicated to all TELUS team members. This information is also shared with our customers through newsletters and other channels, empowering them with valuable insights and guidance on reducing false alarms and enhancing their security systems.

By actively engaging with AHJs and maintaining a strong line of communication, our AMS team helps us stay aligned with industry standards and regulatory requirements. Their efforts ensure that we are continuously improving our operations, addressing any concerns or trends identified by AHJs, and providing our customers with the most up-to-date information and support.

In summary, the AMS team within our Central Alarm Monitoring team plays a vital role in establishing and maintaining relationships with AHJs. Their focus on collaboration, information sharing, and incorporating AHJ feedback helps us reduce false alarms, improve service delivery, and stay ahead of industry trends. Through their efforts, we strengthen our partnerships with public safety agencies and ensure that our customers receive the highest level of service and support.

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## Q12

**BUSINESS STRATEGY/CUSTOMER RELATIONS** - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)

We prioritize effective communication and maintaining strong relationships with our customers. We have several strategies in place to solicit the voice of our customers and keep them informed about business developments, advancements, and new products or services.

Voice of Customers Surveys:

We regularly conduct voice of customers surveys to gather feedback on the customer experience. These surveys allow us to measure customer satisfaction and identify areas for improvement. Our monitoring supervisors review survey results, listen to customer calls, provide coaching and recognition to team members, and collaborate on action plans for improvement. If an issue is identified, supervisors engage with the appropriate teams to address and resolve it, ensuring customers are informed about the resolution.

Event Response Program:

Our Event Response Program is designed to provide exceptional support to customers following a real-life event such as a fire, burglary, or medical incident. A specialized team reaches out to customers within hours to verify their safety and offer additional assistance. This can include arranging hotel accommodations for customers displaced from their home due to a fire, providing virtual counseling sessions through our partnership with TELUS Health for customers who are the victims of a crime or who have suffered property loss, or sending gift baskets or flowers to delight customers. We go above and beyond industry standards to support our customers during vulnerable times, demonstrating our commitment to their well-being and satisfaction.

Marketing & Proactive Technology Upgrade Programs:

We utilize various marketing channels, including television advertisements, social media platforms, billboards, email campaigns, and radio commercials, to keep our customers informed about business developments, advancements, and new products or services. Additionally, we have proactive technology upgrade campaigns where we identify aging systems and proactively reach out to customers through outbound calls and direct mail campaigns. These efforts aim to educate customers about new products and the benefits of upgrading their systems.

Cross-Selling and Recontracting:

Our call center teams are trained to identify opportunities to share new products and services with customers during interactions. Through cross-selling and recontracting efforts, we ensure that customers are aware of the full range of solutions we offer and can take advantage of the latest advancements in security and automation.

By actively soliciting the voice of our customers through surveys, providing exceptional support during challenging times, and implementing targeted marketing and upgrade programs, we foster open and transparent communication. We strive to keep our customers well-informed, address their needs and concerns, and offer them the best possible solutions and services. Through these efforts, we build strong customer relationships, enhance satisfaction, and continue to meet and exceed their expectations.

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## Q13

**ENGAGEMENT WITH INDUSTRY GROUPS - Identify relevant industry association memberships that your center maintains. How does your company participate in or contribute to these associations? (5%)**

TELUS maintains memberships with several relevant industry associations to actively participate in and contribute to the advancement of the security industry.

### CANASA:

TELUS is a member of the Canadian Security Association (CANASA), a national not-for-profit organization dedicated to advancing the security industry. As a member, TELUS actively participates in CANASA conferences and trade shows, securing a booth to showcase our products and solutions. We also send members of our management team to these events to network with industry peers, stay updated on industry trends and best practices, and participate in educational sessions.

### TMA:

TELUS holds a membership and has obtained the Five Diamonds Certification from The Monitoring Association (TMA). Additionally, all our agents undergo TMA certification at level 2 training as part of our comprehensive training program. This certification ensures that our team members are well-equipped with the necessary knowledge and skills to provide top-quality monitoring services.

### ULC:

TELUS adheres to the standards set by Underwriters Laboratories of Canada (UL Canada), an independent product safety testing, certification, and inspection organization. We install fire monitoring systems in accordance with ULC standards and issue ULC certification for our customers. Our monitoring stations are ULC compliant, and our specialized agents and field technicians receive training on ULC standards to ensure proper response and servicing of these systems. We also conduct annual inspections and retain inspection reports in accordance with ULC guidelines.

### Info-Crime:

TELUS is a key sponsor of the Montreal Info-Crime program, which encourages citizens to anonymously and confidentially report criminal acts. Our Director of Monitoring, Sophie Gravel, serves on the Info-Crime Board of Directors, actively contributing to the program's mission of fighting against crime. The board monitors policies, shares expertise, and works in partnership with the City of Montreal, the media, and the police to promote citizen engagement in reporting criminal activities.

By maintaining memberships in these industry associations, TELUS demonstrates its commitment to staying connected with industry developments, sharing knowledge and expertise, and actively contributing to the advancement of the security industry. These associations provide valuable platforms for collaboration, networking, and staying informed about industry trends, standards, and best practices.

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## Q14

### ADDITIONAL INFORMATION

TELUS is a dynamic, world-leading technology company powered by purpose with \$16 billion in annual revenue and 15.2 million customer connections. We are transforming healthcare and making our food supply more sustainable while reducing our environmental footprint and connecting Canadians, offering both personal and business solutions (security, internet, mobility).

TELUS Smart Security & Automation has experienced remarkable growth in the industry, propelled by our cutting-edge products, services, and strategic acquisitions of successful alarm companies across Canada. Our journey began with the acquisition of AlarmForce in 2018, which brought us 40,000 security customers. Since then, we have continued to expand, acquiring notable companies like ADT Canada, Vivint Canada, and Brinks Canada. This strategic growth has led us to achieve significant milestones, surpassing 1 million subscribers in March 2023.

We take pride in being recognized as Canada's most trusted and fastest-growing security and automation company, having earned the prestigious title of Canada's Most Trusted Alarm Service by BrandSpark in both 2022 and 2023. Additionally, our Smart Security & Automation team has received esteemed accolades, including the Stevie International Business Award for Customer Service Team of the Year in 2022, two Stevie Awards for Women in Business in 2023, and three Stevie Awards for Sales & Customer Service in 2023, including gold in Achievement in Customer Experience and Service Department of the Year, along with the People's Choice Award.

Beyond our success in the security industry, TELUS has driven substantial growth in our adjacent businesses through effective cross-selling efforts. Since 2018, TELUS Smart Security & Automation has generated 647.4K revenue-generating units across our mobility and home services businesses, further solidifying our position as Canada's leading security company.

Another notable achievement is the establishment of our Event Response Program, which has provided exceptional support to over 4,300 customers, deploying over \$190,000 in goodwill gestures. This program is designed to assist customers following fire, burglary, or medical events, going above and beyond industry standards to ensure their safety, comfort, and well-being.

These accomplishments reflect our commitment to delivering innovative solutions, exceptional customer service, and a seamless experience for our subscribers. As we continue to evolve and expand, we remain dedicated to providing the highest level of security and automation services to our growing customer base.

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## Q15

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

**TELUS%20Logo.jpg (623.1KB)**

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#5

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, February 23, 2024 4:19:55 PM  
**Last Modified:** Friday, February 23, 2024 4:31:16 PM  
**Time Spent:** 00:11:20  
**IP Address:** 72.172.87.66

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Page 1

### Q1

Please provide the following information

Award Contact Name	<b>Scott Goldfine</b>
Company	<b>Elite ISI</b>
Email Address	<b>sgoldfine@eliteisi.com</b>
Phone Number	<b>3107207576</b>

---

### Q2

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

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### Q3

**TRAINING AND EDUCATION** - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

Agents receive 50 hours training initially and continuous training throughout their career.

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### Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

The SOCC runs disaster recovery training drills every 3 months.

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## Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

Elite uses proprietary processes to weave together the Ai and command/control tools to be able to address high volume of traffic from video streams to reduce the number of false alerts and allowing agents to have a gamified experience in preventing crime.

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## Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

Response protocols vary in different situations. Elites' primary objective is Crime Prevention. The way we accomplish this is by utilizing our Digital Guards (Cameras on Property), these cameras are configured by our technicians to alert our trained Agents of any movement on property. The configuration process has many elements to it. The Cameras are configured using A) Analytics B) Dwell Time C) Masking D) AI Program (Calipsa). By incorporating all these elements, we can catch real live events of human or vehicle movements on property, reducing false alerts and only responding to real events of human/vehicle detection. Our trained Agents then investigate the alerts sent to them from the Digital Guard System (Sureview) and analyze the event. The technology stack reduces the false alarms and our agents' asses/investigate the real live movement on a property. Once the event is analyzed and investigated, the Agents will close out the process in several ways. This is where our response protocols will vary, and false dispatched alarms will be vetted. Below is a sequence of responses to certain events that are analyzed on a daily/nightly basis.

Events that are regular/routine movement/foot traffic/vehicle traffic are closed out as No Malicious Activity after being investigated  
Events where subjects/Vehicles are loitering on property or are in a designated restricted area- The Agents will conduct a Voicedown using speakers on property (PA System) that are calibrated with the Digital Guards. They will instruct the subjects on property to depart the property and advise them of their trespassing. This is Elite's primary objective in deterring crime via the PA Speaker system. This event would be closed out as a Voicedown once the subjects depart the property and is cleared. This is documented in the daily report sent to the client along with a photo of the event.

Events where subjects/vehicles refuse to depart after a Voicedown has been conducted or are observed attempting to commit a crime. This event would be escalated to police call for a trespasser/possible crime in progress/crime in progress. Agents would make the call to the local police department designated to the area of the property, and Agents remain on the line with Police Communications until the call is complete. Agents relay all pertinent information to the dispatcher on what is being observed. Agents will also guide the officers to the exact location to aid in officer safety. Once the call is complete the agent will get the dispatcher and incident number for our written incident report that will be emailed to the client detailing the incident and what the outcome was. Video evidence is provided in real time to local law enforcement to aid in prosecution of any crimes.

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## Q7

**COMMUNITY ACTIVITIES** - Detail how you help employees engage in community activities and causes. (10%)

Elite works closely with our Law Enforcement Advisory Board to build relationships with communities. We have a dedicated team of current and former law enforcement professionals who allow us to engage with communities and agencies for the betterment of security.

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## Q8

METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)

KPIs are kept on a weekly basis. They are used to assess productivity on different platforms. They range from:

Alarm/Event Totals on a Daily Basis- What properties alert the most and why

Voicedown-Crime Prevention Totals daily

Police Calls Conducted- How many police calls are conducted daily and weekly total

Response Time Reports- The time it takes an agent to respond to an alert

Elite ISI monitors its average response time on a weekly basis through Crystal Reports, which tracks the average time it takes a security agent to process and respond once the security agent receives an alert. Dwell times are tracked by management to help incorporate new innovative ideas to lower the dwell time and help security agents succeed in responding to any event in an efficient and timely manner. The lower the response time the faster a security agent can detect suspicious activity on a property and respond to it accordingly. As of the end of 2023 and recently through 2024, Elite's Command Center averaged a 10 second dwell time and continues to lower the dwell time in 2024, surpassing industry standards and setting the bar.

As of 2019 to 2023 we have prevented 204,596 crimes resulting in over 3,247 detainments and arrests, proving that our remote guarding system is effective at backing up law enforcement leading to more arrests, less crime and an industry leading real time view of events in under 10 seconds. Numbers for each year include:

- 2019
  - o 21,183-Voicedowns-Crime Preventions
  - o PD Calls-827
  - o 380-Arrest/Detainments
- 2020
  - o 29,835-Voicedowns-Crime Preventions
  - o PD Calls-1,067
  - o 584-Arrest/Detainments
- 2021
  - o 32,504-Voicedowns-Crime Preventions
  - o PD Calls-1,112
  - o 622-Arrest/Detainments
- 2022
  - o 48,197-Voicedowns-Crime Preventions
  - o PD Calls-1,274
  - o 651-Arrest/Detainments
- 2023
  - o 72,877-Voicedowns-Crime Preventions
  - o PD Calls-1,697
  - o 1,010-Arrest/Detainments

The above numbers are used to staff up operations and conduct specific crime prevention in certain areas if we see an uptick in crime or Voicedowns for suspicious subjects

## Q9

**EMPLOYEE RECOGNITION** - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

We have an employee of the month bonus-Agent with the most events-alerts-voicedowns-PD calls and best attendance wins, along with daily arrest bonuses for all SOCC Agents

Incentive programs include Bonuses for the following

Promotions

Arrest Bonuses

Agent of the Month Bonus-Includes

Attendance

Proactiveness

Customer Service

Police Calls

Crime Preventions-Voicedowns

Events Handled

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## Q10

**QUALITY OF RECORDS** (Alarm history, recordings, etc.) - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

Our Sureview system platform keeps a record of every event handled by an agent. The previous history will tell us

Dwell time- How long it took the agent to acknowledge the alert/event

What cameras alerted and what he saw

What cameras were used to track a subject/vehicle if needed

PTZ Functions

Thermal Cameras

Details- If the agent opened the details tab to find out pertinent information on the property

Notes-Pertinent information for the specific property

Address

PD/FD Numbers

Arm/Disarm hours

Emergency contacts list

Our Vonage system records all phone calls.

Our IVR System tracks when employees Arm/Disarm their sites

The systems are used to help track productivity, along with our KPIs. Sureview helps with the system history and performing these tasks

The history is used to assess each property's needs in security. They range from:

Hot spots where we see spikes in crime-More Voicedowns and police calls will be made in these areas

Areas will be put on high alert with information gathered with our history to help stop and deter crime

Non-Alarming areas- Technicians will assess and see if the property is alarming correctly

IVR History will be used to tell us when certain employees come on to the property. Notes will be updated with these actions

Stat records are provided to each client as well and include:

Alerts-Events-Voicedowns-Police Calls

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**Q11**

**RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)**

Our Law Enforcement Board actively reaches out to police departments and educates them on our services to their community and how our system works. They help educate officers on how the technology works and how it helps reduce false alerts. Calls are only made for real live events by trained agents

Through the years we have built a solid foundation with multiple police departments as they answer our calls for service for real live events in progress. By relating information in real time and guiding officers to the location for their safety, they have gained our trust in our services

Remote guarding provides many benefits for clients and helps law enforcement be more effective while helping maximize and extend limited resources. Collaborations between the security industry and law enforcement are key to maximizing the impact remote guarding can make in our communities. Some of the benefits of remote guarding include:

- Eliminates false alarms
- Real-time eyes on protected sites through the implementation of military-grade artificial intelligence
- Immediate verification and response coordination with law enforcement for valid alarms
- Averaged dwell time of 10 seconds in 2023 and continued reduction of dwell time this year 2024
- Engaging nuisance activity through digital guard systems to get intruders or trespassers to leave without law enforcement intervention
- Guiding responding law enforcement officers through the use of cameras, i.e. digital guards, and audio during the event as officers approach suspects, helping ensure officer safety and that officers will never walk into the unknown
- Providing effective investigation and prosecution support for the resolution of crime by furnishing both audio and visual recordings of the event
- Reporting to clients every morning of any activity involving their premises during the hours of closure

The alarm industry is experiencing the revolutionary emergence of a tremendous improvement over long-standing conventional approaches to protecting property. This revolutionary process, remote guarding, now puts real-time eyes on protected sites through the implementation of military-grade artificial intelligence. Remote guarding provides for immediate verification and response coordination with law enforcement for valid alarms or resolves the intrusion without the need to involve law enforcement through its voice-down capabilities. Because Elite's remote guarding systems eliminate the number of false alarms, law enforcement agencies can focus on pro-active patrol.

Elite ISI's remote guarding expertise is provided to its 415 protected sites in 12 states through the implementation of more than 10,000 digital guards. A digital guard is a "Smart Camera" that utilizes a specific or set of multiple sensors such as high-definition imaging or thermal sensors for detection applications to then produce a set type of alert for crime and catastrophe proactive prevention purposes. Typical applications include trespassing, vandalism, theft, arson prevention, and water or fire damage mitigation measures. Elite's protected sites include Government officials, corporate headquarters, apartment complexes, automobile dealerships, shopping centers, schools, high-value residential properties, movie studios, warehouses and logistics, religious institutions, corporate campuses, and high-rise commercial buildings.

A digital guard is designed, engineered, and placed on a property as a tool for commercial or residential security and remote video applications. They can be set with customized coverage distances to execute outstanding detection with visible surveillance into a highly reliable "prevention alarm" for indoor and outdoor asset protection.

For these applications, "Digital Guards" combine the strengths of machines and people, using video analytics to watch the scene automatically, and alerting security agents with video when a response is needed. This allows remote guarding companies to tie the two applications together – detection and surveillance – to create a video detection solution to prevent crime and mitigate catastrophes.

Key features include thermal and HD intelligent sensors, pan tilt zoom capabilities, embedded video military grade analytics in cameras, artificial intelligence engines and machine learning systems on-board, geo registered and auto stabilization, distance detection range coverage, enhanced detection clarity, and improved accuracy detection in variable conditions such as low lighting

areas and weather factors like wind and rain.

In the case of conventional alarms, something or someone at a protected site sets off an alarm. The alarm company advises law enforcement, and a unit is hopefully dispatched within a reasonable period of time. The reality is that responses are often not seen by officers as a high priority because of the absolute institutional cynicism resulting from the historically high percentage of false calls associated with conventional alarm systems. A typical scenario is where often-overworked officers arrive as soon as priorities allow, and if it was an actual intrusion (remember, most conventional alarms are false), the suspects are long gone. It is common for video systems to have captured images of the intruder(s), but most often they are wearing identity disguising attire.

In the case of true remote guarding systems, there are no false alarms! A disturbance or intrusion at a protected site immediately activates a series of audio and visual monitors in the Elite Command Center and provides continuous live video oversight of exactly what is occurring. Elite security agents are able to provide visual, real-time information to responding law enforcement units of a crime in progress, which greatly increases the likelihood of suspect apprehension. The ability to be the eyes and ears of responding officers provides a tremendous safety advantage for them. Like conventional burglar alarms systems, there are also situations which can activate false alarms, but, unlike conventional systems, remote guarding immediately distinguishes between those things that do and do not necessitate a law enforcement response. Law enforcement is dispatched only when an actual intrusion is being personally observed by an Elite Command Center security agent. Additionally, because Elite remote guarding real-time camera systems are augmented with audio capability, situations that might otherwise result in a law enforcement response (trespassing, skateboarding, transients, graffiti violators, illegal dumping, etc.) are typically resolved by Command Center personnel "voice-downs". Because Elite's remote guarding state-of-the-art equipment has the capability of recording audio and visual when an incident is occurring, Elite is able to provide law enforcement and clients with a visual and audio record to aid in prosecution. Finally, in remote guarding systems such as those provided by Elite ISI, each client receives a report every morning of any activity involving their premises during the hours of closure.

The above realities, coupled with an exhaustive review of Elite's procedures and processes, resulted in Elite receiving the coveted Underwriters Laboratories UL Certification.

Elite ISI interacts with law enforcement agencies on a daily basis. These positive interactions allow Elite the opportunity to provide quality service to its clients. Elite is committed to working with law enforcement agencies to make our communities safe. Elite also presents responding agencies and officers with its Law Enforcement Appreciation Award and a monetary donation to a charity of the agency's choosing.

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## Q12

**BUSINESS STRATEGY/CUSTOMER RELATIONS - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)**

Our team works closely with our sales and marketing department to build reporting, engagement, communication with our customer base via email, direct calls and visits, as well as account reviews for proper management.

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**Q13**

ENGAGEMENT WITH INDUSTRY GROUPS - Identify relevant industry association memberships that you center maintains. How does your company participate in or contribute to these associations? (5%)

UL Certified-First Remote Guarding Company to get certified

FBI LEEDA

TMA

SIA

ESA

PSA

A fundamental element of Elite ISI's accomplishments involves building relationships with law enforcement from the highest executive levels to the responding officers. These partnerships are a powerful component of Elite ISI loss and crime prevention success.

Relationships include Elite ISI's corporate partnership with FBI-LEEDA ("FBI – Law Enforcement Executive Development Association"), the nation's premier association of senior law enforcement executives. Elite ISI is the only remote guarding service provider to train FBI-LEEDA's members about the value and application of remote guarding. This seven-year partnership between leaders in this revolution in domestic security and law enforcement has yielded great results. This partnership has provided FBI-LEEDA's members with vital educational and training opportunities. These programs ensure that its members lead their organizations in the introduction, use, and benefits of remote guarding. The training and educational programs help these law enforcement leaders establish the appropriate roles and boundaries for this truly revolutionary addition to their tactical capabilities. In addition, this partnership represents an important continuation of efforts to help promote and support leadership roles of membership in security-oriented organizations.

Elite ISI is formally introducing FBI-LEEDA to the revolutionary, paradigm shifting impact that interactive remote guarding has in the domestic law enforcement and commercial security fields. The U.S. Military has recognized the critical importance that the addition of remotely managed activities and assets has become in the formulation of their strategies and tactics. However, until now, there have been no similar, sweeping additions to our domestic approaches to protecting private and public assets using remote guarding capabilities.

Additionally, Elite ISI is affiliated with several nationally recognized alarm industry organizations, including Security Industry Alarm Coalition ("SIAC"), InfraGard, and ASIS International.

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**Q14**

Respondent skipped this question

ADDITIONAL INFORMATION

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**Q15**

Respondent skipped this question

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

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#6

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, February 26, 2024 9:35:34 AM  
**Last Modified:** Monday, February 26, 2024 9:54:55 AM  
**Time Spent:** 00:19:20  
**IP Address:** 206.197.209.254

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Page 1

**Q1**

Please provide the following information

Award Contact Name	<b>Carolynn McMasters</b>
Company	<b>ADT Security Services</b>
Email Address	<b>carolynnmcmasters@adt.com</b>
Phone Number	<b>610-331-1759</b>

---

**Q2**

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

---

**Q3**

**TRAINING AND EDUCATION** - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

At ADT, we take great pride in fostering a culture of learning starting from our New Hire Training program. Our comprehensive training ensures that our employees acquire the essential skills to handle a wide range of calls from delivering exceptional customer service to effective emergency call handling. Our curriculum is designed based on established instructional design models such as ADDIE and Bloom's Taxonomy, aiming to provide our employees with the most comprehensive and effective learning experience. We have integrated cutting-edge modules into our training content, including our resiliency course aimed at prioritizing our employees' mental wellbeing. Specifically designed for agents handling emergency calls, this course covers crucial topics like compassion fatigue and burnout. It empowers employees to identify stressors and provides personalized coping strategies and self-care techniques. In addition to mental health, our training curriculum includes in-depth content on our monitoring technology, encompassing AVS-01 and Video Verification. To assess the effectiveness of our new hire agents and our training, we use both quantitative and qualitative evaluation criteria. Through formative and summative assessments, we measure knowledge retention, compliance, and agent readiness. Our internally developed content adheres to TMA Five Diamond principles and utilizes various methods like e-Learning and Instructor Led Training (ILT). These methods seamlessly integrate interactive elements such as role-playing, realistic simulations, gamification, on-the-job training, and project-based learning.

To ensure we continuously learn and address knowledge gaps, we have implemented a range of strategies. Our training and communication departments collaborate to develop a well-rounded strategy that aligns with our training objectives and fosters skill enhancement. Through this collaboration, we offer targeted reinforcement training, keep team members informed of latest protocols and company updates, and assess the comprehension of frontline leaders to ensure the implementation of efficient training approaches. Additionally, our Customer Experience & Quality Managers listen to calls to provide personalized coaching and mentoring plans for individuals, while our Enablement Managers collaborate with the Workforce Management team to offer ongoing education opportunities that drive improvements.

Our trainers are employees promoted from within the organization based on their extensive operational expertise and training background. They must have at least 2 years of experience in training/coaching as well as at least 12 months' experience working in an inbound/outbound call center setting. To ensure their proficiency, trainers participate in programs such as the Aubrey Daniels Leadership Training and obtain certification through ADT's Trainer Certification Program.

We strongly believe in supporting our employees' growth from day one. To motivate and reward our agents, we've implemented the Blue Bravo initiative, which offers spendable dollars as rewards for active participation and exceptional achievements. In 2023, we dedicated more than \$500,000 exclusively to training expenses and incentives for our customer care and monitoring teams. Our commitment lies in investing, nurturing, and supporting our employees throughout their professional journey.

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## Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

As a publicly traded company providing critical life safety services, business continuity is at the forefront of ADT's strategic and operational planning. The planning includes strategies to avoid disruptive incidents and rapid recovery procedures that mitigate operational disruption should an outage occur. The effectiveness and reliability of our business continuity plan was evident in 2023, as we experienced zero outages.

ADT's alarm monitoring architecture exceeds traditional automation system redundancy designs. Automation computing resources are located at two geographically dispersed locations that eliminate the possibility of a regional disaster simultaneously impacting more than one center. Our load sharing architecture distributes alarm processing across four servers, two in each location. The two servers in each center operate in a redundant configuration. All four of the servers are sized to handle 100% of the alarm processing function, should that ever be needed. While highly improbable, servers in our testing labs provide a fifth level of backup. Alarm signals that require action are sent to a custom designed virtual alarm queue which distributes alarm events to dedicated alarm monitoring agents across three geographically dispersed locations. The following provides additional details as requested:

- Each ADT site is required to have a current incident response plan, which is reviewed and updated annually. The attached Business Continuity document provides an overview of the processes and structures consistently followed by all sites.
- ADT conducts several disaster recovery exercises each year, each focusing on different applications that support all areas of ADT's diverse business.
- Site Supervisors or Area Administrative Managers review the emergency response plan at least annually. The review includes disaster management, evacuation plans and procedures, evacuation management, alarm systems, and reporting procedures. Simulating local, regional, and national disruptive events are part of the exercises.
- Backup of the data is performed regularly to two geographically dispersed locations.
- Business continuity is prioritized through comprehensive training and backup support for our teams. Our testing and validation process includes orientation, tabletop exercises, walk-throughs, functional tests, and full-scale drills to ensure readiness. After each test, we debrief to reflect and make necessary changes to our plan, documenting, and reporting everything to the Business Continuity Management Office.

Business Continuity Outline Page is attached.

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## Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

ADT leverages advanced business intelligence (BI) tools to enhance operational efficiency across all areas of the business. These BI tools allow for real time and periodic tracking and reporting, empowering both tactical and strategic decision making.

By utilizing historical and real time data from various sources such as Human Resources, Monitoring Operations, alarm metrics, weather forecasts, social trends and local/national events, ADT can forecast schedules more accurately to optimize staffing levels. In 2023, ADT efficiently managed 9 million alarm calls, boasting an average response time of just 15 seconds. This optimization directly contributes to achieving customer satisfaction goals.

Furthermore, BI tools are instrumental in measuring and enhancing the effectiveness of local, regional, and national marketing campaigns for both dealer-driven and direct sales efforts. Marketing initiatives like sales programs, media advertising, and sales promotions undergo continuous measurement and evaluation. Customer feedback post sales and installation allows BI tools to analyze customer satisfaction and identify paths for improvement.

ADT's BI tools have been incredibly valuable in delivering excellent outcomes for our customers. One notable achievement is the development of a program that utilizes virtual assistance technology to enhance the customer experience. This innovative tool allows ADT specialists to troubleshoot effectively by gaining a visual understanding of the customer's environment. Consequently, it overcomes barriers associated with technical terminology, reduces the need for callbacks and unnecessary visits and ultimately ensures enhanced customer satisfaction. In 2023, this virtual assistance tool successfully resolved 1.1 million cases, conducted 350,000 video sessions, and achieved a Truck Roll avoidance rate of 79%.

In our response under Section 7, we provide detailed information on how technology and business intelligence (BI) are utilized to reduce false alarms. Furthermore, in Section 9, we delve into the utilization of BI tools for measuring key performance indicators (KPIs) and taking appropriate actions.

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## Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

Reducing false alarms is a top strategic initiative for ADT. At the forefront of this initiative is ADT SMART Monitoring™ (SMART). SMART implements ADT-developed technologies and monitoring center workflows as extensions of ADT's implementation of MAS MasterMind. The processes that drive false alarm reduction are seamlessly integrated into the regular workflows followed by ADT operators.

ADT empirically tracks alarm events that are canceled by SMART. Since SMART was introduced in January 2021, an estimated 7 million alarm notifications have been successfully canceled. As a result, the number of false alarms, which would have previously triggered notifications to emergency services, have been reduced by more than half. This achievement is made possible through continuous measurement and analysis using intelligent business tools that feed valuable insights back into SMART, ensuring ongoing improvement.

The crucial component behind this significant reduction is the Alarm Messenger application. Once a customer's alarm system is activated, Alarm Messenger swiftly sends alerts to notify the primary contact and other designated emergency contacts via text messages. Each contact receives a link to an Alarm Messenger group chat dedicated to that specific alarm event. Within this group chat, any contact can confirm if emergency response is necessary or choose to cancel response to the alarm.

Alarm Messenger automates 911's inquiry on homeowner or keyholder response. In cases requiring police assistance, customers can provide their current location status and ETA if they are not at home. The app facilitates text-based communication between monitoring center agents and customers. Furthermore, customers can request a one-time extension of 60 seconds to respond to queries.

ADT played a significant role in shaping the TMA-AVS-01 American National Standard. Currently, ADT is piloting AVS with several 911 ECCs/PSAPs. The use of the AVS standard has significant support within the Public Safety community. While not directly aimed at reducing false alarms, AVS helps optimize how law enforcement allocates resources for alarm responses. As public safety increasingly adopts AVS, Alarm Messenger offers customers additional prompts that contribute to SMART alarm processing related to AVS scoring.

To identify frequent offenders, ADT generates two weekly reports which allow our team to proactively reach out and assist these customers. We provide a white glove service by addressing issues through service appointments, equipment checks and if necessary, work orders. Additionally, we offer Virtual Assistance empowering customers with expert video guidance from ADT specialists so they can remotely replace or add security devices.

Our training program extensively covers crucial training on managing alarms and false alarms. Apart from our comprehensive courses, we also offer a specialized training called "Take 5 Training; Reducing False Alarm Dispatches." This course provides guidance and resources that emphasize ADT's recommended approaches for minimizing false alarms.

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**Q7****COMMUNITY ACTIVITIES - Detail how you help employees engage in community activities and causes. (10%)**

At ADT, nurturing community engagement among our employees is deeply ingrained in our commitment to creating a safe and inclusive environment. To facilitate this, we have implemented various initiatives that empower our workforce to actively participate in community activities and causes.

ADT's corporate social responsibility program, known as Safe Places, exemplifies our dedication to building safer and more sustainable communities. Our employees enthusiastically engage in a wide range of local and national volunteer projects. We collaborate with esteemed organizations such as Fight Blight BMore, Requity, and Habitat for Humanity. For example, in Baltimore, our employees actively support Fight Blight BMore's Hack Hub by providing technical resources and entrepreneurial education. They also install smart home security systems generously donated by ADT and create donation boxes for books and canned goods. Through Requity, we empower students at Carver Vocational Technical High School by offering trade skill education opportunities while simultaneously renovating blighted houses. This not only provides an employment pipeline but also creates mentorship possibilities for our employees. On a national level, we contribute to the construction of safe, smart, and sustainable housing through partnerships with Habitat for Humanity. Additionally, we participate in community renewal projects such as cleaning local parks, gardens, and other communal spaces. In Boca Raton—where our headquarters are located—ADT employees collaborate closely with the YMCA to promote the development of safe communities that provide inclusive spaces for children and families to learn and thrive.

To foster greater involvement within our communities, ADT has established Business Employee Resource Groups (BERGs). Each BERG receives financial support for donations to nonprofit 501(c) organizations aligned with their missions. These groups focus on destigmatizing mental health and promoting awareness for diverse groups like women, LGBTQ+, Black, Asian, Veteran, Hispanic, individuals with disabilities, and young professionals. In 2023, we introduced the Sustainability BERG to highlight our commitment to environmental sustainability. This BERG provides ADT employees with opportunities to actively participate in and learn about eco-friendly practices that resonate with ADT's values. Employees are allotted 2 hours per month to participate in meetings and events related to the BERGs.

To acknowledge and appreciate the commitment of our employees towards volunteering and contributing to the community, we feature their stories in monthly newsletters and video updates. This helps us emphasize the importance of these contributions to the entire ADT team, fostering a sense of safety for everyone. The ongoing expansion of the BERGs and growing participation in the Safe Place program stands testament to the positive outcome of this approach.

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## Q8

**METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)**

The use of Key Performance indicators (KPI) is a best practice throughout ADT business operations. Business Intelligence tools enable KPI best practice usage for individual as well as departmental metrics.

Business system integrations enable all incoming and outgoing calls and alarm/event activity to be directed to a trained Emergency Dispatch Operator (EDO) specifically for the call and/or event type with KPI tools measuring performance in real time as well as historical comparisons. Reporting for these KPIs is accessible in real-time, hourly, daily, weekly, and monthly. Fundamental KPI metrics measured include alarm response times, agent satisfaction, call-handling time, call abandonment rate, first-call resolution, and call transfer rate. Additionally, tracking tools provide Quality Assurance (QA) and compliance measurement to track each operator's adherence to established alarm processing workflows and policies.

Management dashboards enable historical performance analysis and quick response to negative trends. EDO's access personal dashboards with an "Agent Scorecard" measuring individual performance, highlighting top performers, and indicating areas for additional training. This system facilitates prompt resolution of issues like increased call handling time or call abandonment through immediate notification to supervisors and managers.

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## Q9

**EMPLOYEE RECOGNITION - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)**

ADT takes a comprehensive and multi-faceted approach to recognize and celebrate employee excellence across various performance metrics. Our recognition initiatives aim to highlight outstanding achievements in areas such as productivity, Quality Assurance (Q/A) scores, customer satisfaction surveys, and attendance.

Recognition begins through internal communications, where employees receive weekly and monthly recognition emails. Furthermore, acknowledgment takes place during monthly Town Halls led by ADT leaders, creating a platform for widespread recognition. Additionally, team members are individually recognized by their direct management during Team Meetings and Huddles.

The ADT Circle of Excellence award is presented to individuals embodying the company's core values, including urgency, accountability, collaboration, discretionary effort, and the voice of the customer. Award winners receive an all-inclusive trip as a testament to their consistent dedication and impact on the organization.

The LifeSaver Award Program is another significant initiative, originating from direct customer feedback. Recognizing exceptional skill and quality demonstrated by employees, this program involves an on-site meeting with the customer, agent, installation technician, and emergency responders, highlighting the positive impact the employee had on the customer's life. We invite you to explore these firsthand by visiting our LifeSaver page. <https://www.adt.com/stories>

ADT's Blue Bravo platform rewards team members for their contributions, offering points redeemable for various items. With referral bonuses of up to \$2000, ADT recognizes the crucial role employees play in attracting top talent and fostering a culture of engagement. The company's dynamic career progression model, coupled with financial bonuses and rewards, aims to reduce attrition. The impressive 40-year tenure of our Monitoring Director in 2023 showcases the success of this approach. ADT's commitment to recognition programs is evident in our thriving, engaged workforce, with many employees having tenures well over a decade.

**Q10**

**QUALITY OF RECORDS (Alarm history, recordings, etc.)** - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

At ADT, we prioritize the management of our records across the organization, ensuring compliance with legal requirements and regulatory standards. Our comprehensive data management strategy plays a crucial role in this endeavor, particularly when it comes to our Business Intelligence (BI) tools, discussed in other sections, that rely on the extensive data stored in ADT's repositories. To ensure the relevance of stored data, mitigate compliance risks, minimize legal exposure, and establish clear guidelines for retaining and archiving various types of data, we have implemented a comprehensive data retention policy. This strategic approach not only guarantees compliance with regulations but also aligns with our commitment to making informed decisions based on data. Alarm data identified within UL listing requirements is available online within the MasterMind automation software for thirteen months. Alarm history data required to support customer requests is available for at least two years. To accommodate the business needs identified above, as well as identified in other sections of this application, data is available for research for seven years.

Within monitoring operations, data retention includes alarm processing information, operator actions and phone call recordings. This valuable dataset serves as the basis for analytical tools that provide managers with key metrics related to customer interactions, satisfaction levels, agent alarm handling compliance and overall trends within the monitoring center. We also use historical data to understand broader trends and identify opportunities for improvement. By studying patterns from the past, we gain insights into current challenges, enabling us to proactively address issues and optimize our operations. This approach helps maintain high customer satisfaction and supports the professional growth and training of our employees.

Our dedication to leveraging historical data is apparent in our utilization of monitoring center analytics tools. By analyzing this information comprehensively, we gain valuable insights into key performance indicators (KPIs). These tools help us thoroughly assess customer interactions and satisfaction to ensure that we meet our service quality standards. Additionally, analyzing how agents handle alarms helps us improve operational efficiency and effectiveness.

Furthermore, our data history is crucial for developing and refining ADT SMART's algorithms for detecting and preventing false alarms. By using past alarm event data, we continuously enhance the effectiveness of these algorithms, making our security infrastructure more reliable and responsive.

ADT's records retention process is pivotal in our data management strategy—especially when it comes to alarm history and phone calls. It ensures compliance while serving as a valuable resource for evaluating current challenges, boosting productivity, and comprehending the dynamics of our business, customers and employees. Our strategic utilization of historical data reflects our dedication to excellence and continuous improvement in delivering best-in-class security solutions.

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## Q11

**RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)**

Life safety, our industry's primary mission, requires a strong collaboration with public safety, including law enforcement, fire, and emergency medical services, and 911 emergency call centers. ADT's commitment to advocating for programs within the public safety sector is extensive, aligning with our strategy for fostering these strong relationships, with the added benefit of positively impacting TMA members.

ADT is instrumental in recruiting public safety leaders to serve on the PPVAR board and TMA standard development committees including fire chiefs, police chiefs, and PSAP/ECC subject matter experts. Additionally, ADT actively participates in public safety association events, such as APCO, NENA, IACP, NSA, and IAFC, to promote alarm monitoring relationships and programs.

Throughout 2023, ADT engaged in proactive collaboration with ECCs/PSAPs, frequently conducting in-person meetings to promote the adoption of the TMA AVS 01 standard. This collaborative effort resulted in the successful initiation of AVS pilot programs, with multiple programs implemented in California and Florida. ADT also established partnerships with other monitoring companies to extend the reach of AVS pilots. Our continuous outreach initiatives within the public safety sector are geared towards fostering the widespread adoption of AVS across the entire alarm monitoring industry.

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## Q12

**BUSINESS STRATEGY/CUSTOMER RELATIONS - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)**

ADT employs a robust communication strategy to effectively engage and communicate with our customers, tailoring our approach to meet their unique needs. Our communication channels include emails and prominent social media platforms such as Facebook, LinkedIn, and Pinterest. We also have a monthly customer newsletter, a previous SAMMY Award winner from SSI Security Sales and Integration for Best Newsletter or Content Marketing, to further enhance our customer interactions. Additionally, our customers receive SMS notifications through our dedicated ADT+ app, providing updates on their system status and marketing offers. This proactive engagement ensures our customers are well-informed about our business developments, and it enables us to continually enhance their experience with our products and services.

To ensure we stay attuned to the voice of the customer, ADT utilizes Medallia, a powerful tool for collecting real-time feedback. Through surveys, we measure the Net Promoter Score (NPS), enabling us to gauge customer satisfaction and loyalty. This data-driven approach empowers our leaders to assess the performance of our monitoring and customer service representatives. Immediate insights from customer feedback allow us to identify opportunities for improvement, enhancing the overall customer experience. Moreover, this feedback loop provides valuable input for our training and upskilling initiatives, ensuring our team is equipped to deliver our goal as the best service in the industry.

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### Q13

**ENGAGEMENT WITH INDUSTRY GROUPS** - Identify relevant industry association memberships that you center maintains. How does your company participate in or contribute to these associations? (5%)

ADT is committed to supporting industry organizations through significant participation and financial funding. As a member of The Monitoring Association (TMA), Electronic Security Association (ESA), Security Industry Association (SIA), Partnership for Priority Verified Alarm (PPVAR), and the Security Industry Alarm Coalition (SIAC), ADT plays a crucial role in shaping the security industry's landscape.

At the leadership level, senior executives demonstrate a strong dedication to industry organizations, with several having served as presidents of TMA and PPVAR. ADT associates currently hold key positions on the Board of Directors for TMA, SIA, SIAC, and PPVAR, along with executive committee roles for SIA and TMA. ADT's subject matter experts take on active roles, including committee chairs, in government relations and standards committees, showcasing the company's commitment to guiding industry standards and practices. They also participate within organizations like UL, NFPA, NENA, and APCO, contributing valuable insights and expertise.

Additionally, ADT's local office managers are actively involved with state alarm associations, playing a crucial role in addressing issues and staying updated on industry trends at both the state and municipal levels. This collaborative effort reinforces ADT's dedication to fostering strong participation and commitment to industry associations.

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### Q14

**ADDITIONAL INFORMATION**

At ADT, we believe that everyone deserves to feel safe. This foundational principle motivates us to enhance our innovative monitoring services and seek new ways to enhance the well-being of our customers, employees, and the security industry. We are at the forefront of efforts to elevate the safety of our communities. We greatly appreciate the opportunity to apply for TMA's Monitoring Center of the Year.

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### Q15

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

**ADT%202023%20BCP%20Outline%20Page.docx (128.2KB)**

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#7

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, February 26, 2024 10:18:51 AM  
**Last Modified:** Monday, February 26, 2024 10:39:25 AM  
**Time Spent:** 00:20:33  
**IP Address:** 198.17.112.250

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Page 1

**Q1**

Please provide the following information

Award Contact Name	<b>Anthony Iannone</b>
Company	<b>Affiliated Monitoring</b>
Email Address	<b>anthony.iannone@affiliated.com</b>
Phone Number	<b>201-752-3818</b>

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**Q2**

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

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**Q3**

TRAINING AND EDUCATION - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

Affiliated's dedicated Chief Learning Officer (CLO) is responsible for our company wide training programs which includes both our new hire training as well as ongoing training and professional development.

We have been able to increase operator training success through a combination of new techniques including our interactive learning management system (LMS) that was implemented in 2016.

New hires participate in an eight-week training program that culminates with a certification process.

The first 2 weeks include a combination of instructor led training (ILT) and individual skills building and testing through our LMS system. Additionally, our dedicated training classroom allows for operator trainees to participate in:

- Demonstrations and Simulated Alarm Situations with role playing
- Side-by-side instruction on company protocol, phone procedures, keyboarding, etc.
- Interactive, web-based E-Learning tools are used to reinforce classroom topics and to perform knowledge assessments used to track a new hires progress through the curriculum
- Recordings of each trainee are reviewed and critiqued by the trainer
- A thorough explanation of the interaction between different departments by an experienced Customer Service employee
- Customer Service, which is the last stop before on the job training, and offers a great cross training opportunity for all new trainees. Trainees listen in as Customer Service staff members interact with customers in order to better understand how the department functions.

Weeks 3 and 4 are OJT (On-the-Job Training) for all personnel. Each trainee is assigned a checklist, ensuring that each facet of the position is covered. This includes dispatch procedures, how to use our systems, etc. This training is conducted by special OJT instructors who go through structured classes to become skilled at training. This system is designed to promote uniformity and guarantee trainees are receiving the same instruction in accordance with company protocol.

After one month, the first round of training is completed. A supervisor then sits with the trainee and reviews their checklist to make sure that all necessary skills have been learned. A job specific exam is then administered, and a passing score must be achieved in order to move on to the last phase of training.

Once our position specific exam has been passed, trainees are given the TMA Level 1 Operator Certification test. Passing the test is a critical milestone since Affiliated prides itself on complying with TMA standards for central station dispatch.

Before graduating from the training program, the trainee meets with the Training Supervisor to ensure there are no knowledge gaps and reviews all subjects covered. This is a final assessment for all Central Station trainees.

The moment training ends, quality control begins for all central station employees. Affiliated has a dedicated Quality Assurance team. This includes regular scheduled evaluations, a review of any interesting or difficult calls, and a checklist is used to measure the progress of the trainee. A meeting occurs between the Training Supervisor and the employee to go over any difficult cases and close any knowledge gaps. In this sense training never ends for our central station employees. We are dedicated to making sure each dispatcher receives continued education to keep current on procedures, protocols, and maintain the quality of our service.



## Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

Affiliated operates two interconnected and fully redundant load-sharing monitoring centers.

Affiliated Monitoring established a documented disaster recovery plan for our central station in 2011 in tandem with the construction of our New Jersey monitoring center and the planned move from our previous location. The plan is fully reviewed in Q4 of every year but was significantly revised and improved with the addition of our Houston, Texas monitoring facility in 2016. The plan was last reviewed in December 2023. Influenced by our successful performance during a wide variety of emergency events, spanning from the September 11 terrorist attacks and the 2003 Northeast Blackout, to Hurricane Harvey and the COVID pandemic, our disaster recovery planning includes utilization of redundant backup power as well as fully redundant networks to receive signals and send communications.

One of the most significant tests of our disaster planning and redundancy came when Hurricane Sandy landed in 2012 and, as a result, our New Jersey facility did not have access to local utility power for over eight days. Our monitoring center and personnel were able to operate continuously throughout the storm and its after effects, proving the success of our disaster-recovery plan. Since this event, we have continued to refine and improve our disaster recovery plan, and, with the addition of our second facility in Houston, Texas, our disaster recovery plan has been expanded to cover operations in Texas as well as to provide for the shifting of signal traffic and operations between facilities as required.

Affiliated's Houston location successfully operated through Hurricane Harvey in the fall of 2017, and our New Jersey location weathered Hurricane Ida, with unprecedented rains and flooding, in September of 2021. In both cases, signal handling and response times were not impacted.

The COVID epidemic was also a significant test of our disaster recovery plan. When a public health emergency was declared, we were able to leverage the preparations we had made as part of our disaster recovery planning to quickly support a shift from conventional monitoring to nearly 100% home-based monitoring specialists. We were able to make this change in just a few days. Our preparations around having extra equipment and laptops, combined with our secure, flexible network infrastructure, helped us to pivot to remote monitoring during a rapidly evolving emergency situation.

All Affiliated Monitoring's disaster recovery plans start with situations that may arise at our two locations. These include power failure, telephone failure, network failure, etc. In no particular order the following responses have been put in place and all procedures have been documented both online and in a printed Emergency Procedures Manual:

- Power Failure – Our NJ facility employs two 600kw Caterpillar diesel generators with automatic switchover and 16 days of fuel on site. Our TX facility employs two 150kw Cummings generators, one fueled by diesel and one fueled by natural gas.
- Power Failure – Our NJ facility uses twin redundant Twin Liebert 150KVA Uninterruptible Power Supply (UPS) systems with 4 hours of battery backup capacity. Our TX facility utilizes dual 150KVA Uninterruptible Power Supply (UPS) system with 4 hours of battery backup capacity.
- Telephony Failure – We have established redundancy with two independent telecom providers that supply both copper and fiber service over completely diverse paths to Affiliated in NJ. Telephone service to our TX facility originates from our NJ location and is also dual path redundant, and can survive a complete failure of our NJ facility.
- Telephone Switch Failure – Multiple patch and carrier trunk routes combined with channel bank redundancy serve to make in house operations redundant without the need for a manual cutover of any type.

- Network Failure – Both our NJ and TX Local Area Networks (LANs) provide for dual redundant independent switches into Affiliated with dual Network Interface Cards (NICs) at every workstation and server, so at any given moment the central station can be broken off into two independent LANs, thereby avoiding any single point of failure that exists over our extended WAN.
- ISP Failure – We use multiple Internet Service Providers (ISP's) at both our NJ and TX facilities with Border Gateway Protocol (BGP) in place to automatically reroute IP data as needed.
- Server Failure – All critical servers are dual redundant with dual power supplies connected to independent power sources. The Mastermind (MAS) software automation, our most critical application, has six completely redundant servers.

Affiliated's Disaster Recovery planning also includes information and instructions on our response to perhaps the most important part of the monitoring center – the people. We continue to have contingencies in place to make sure that we are not only adequately staffed during even the most difficult circumstances, but that our team members are properly cared for, including the provision of meals, extra clothing, sleeping accommodations, and dedicated shower facilities.

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### Q5

**USE OF TECHNOLOGY - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)**

As Affiliated has grown, it has become more and more important to properly instrument our performance and report on business activities. This level of business intelligence enables us to maintain our continued upward growth trajectory. To support these reporting needs, Affiliated has assembled an industry leading team of data mining and reporting professionals that make up the Affiliated data analytics team.

This team is made up of experienced data specialists, including DBAs and experts who are well versed in technologies like SQL, PowerBI, and SSRS. They help our business by generating informative reports on almost very conceivable metric of performance of our teams and our business. Examples are as diverse as on-time attendance percentages for our monitoring team, A/R payment aging, support call handling times, and new monitoring specialist performance.

Perhaps more important than reporting on these items are the deep trend analyses performed by the team. By reviewing these trends, our leadership team can quickly determine if things are getting better or heading in the wrong direction and apply corrective measures before a problem manifests.

## Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

Affiliated monitors alarm systems in all 50 states, Canada and many US territories and is totally committed to minimizing false dispatches wherever possible.

Ongoing Comprehensive Efforts to Minimize Unnecessary Dispatches:

Affiliated regularly reaches out to dealers to coordinate a plan of how alarms should be handled during inclement weather or other events that may generate large numbers of false alarms. Since we monitor for a variety of dealers, we make sure to work closely with the dealers to ensure our procedures minimize the number of false dispatches.

AlertMessage™ 2.0:

In 2016 Affiliated introduced AlertMessage™ our text message driven customer notification and response system. By texting to call list contacts, AlertMessage helps us to radically reduce false alarms. AlertMessage is in use by a vast majority of our dealers. No single false dispatch technology or procedure has had as profound an impact in the history of the alarm industry. AlertMessage was recognized by TMA as an industry leading solution through its 2020 Marvel Award. In 2022, we released AlertMessage 2.0, which improved AlertMessage by allowing users to interact with the system via text message from any mobile device. This change has driven increased adoption and even better metrics around false alarm reduction. Please visit [www.affiliated.com/amvideo](http://www.affiliated.com/amvideo) to watch a short video on its capabilities.

Video Verification:

Another method used to reduce false dispatches is video verification. Affiliated strongly promotes the use of video verification technology to its dealer customers and has dedicated technical resources on staff to help dealer adopt video technologies.

The High and Excessive Alarm Reduction Team (HEART):

Developed in 2015, Affiliated assigned dedicated employees to work with our dealers as part of a HEART Team to reduce false and excessive alarms. Over the past eight years, the HEART Team has helped to eliminate over 28 million signals and over 1,600,000 unnecessary alarm events from reaching our monitoring centers. The HEART Team has been the recipient of the Affiliated Rock Star Department of the Year award at our annual company awards gala multiple times since its inception. Over the past few years, we have added automated reporting to let dealers know of issues as quickly as possible, and we continue to find new methods to reduce unnecessary alarm traffic and false alarm.

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## Q7

COMMUNITY ACTIVITIES - Detail how you help employees engage in community activities and causes. (10%)

Affiliated has made a concerted effort to contribute to the communities in which we operate. Here are just some of our efforts:

### BATTLING FOOD INSECURITY:

Each holiday season Affiliated employees contribute hundreds of pounds of non-perishable food goods to those in need. To help encourage support for the St. Michael's Food Pantry and Elizabeth Branch Food Pantry, Affiliated matches all food donations by employees and rewards them with prizes in return for their generous donations to these worthy causes.

### SUPPORTING ADULTS WITH DISABILITIES:

Affiliated works closely with JobPath, an organization that supports people with developmental disabilities by helping them find paying jobs and play valuable roles in their communities. Affiliated is proud to currently employ three JobPath placed employees.

### TRAINING TOMORROW'S LEADERS:

Affiliated is a proud participant in the corporate work/study program of the inner-city based high school Christo Rey. Each year, a promising high school student joins us for a year-long work study program, providing valuable work experience and exposure to a professional environment. Inevitably, the session ends with Affiliated employees having learned as much or more than the student. We are proud to have graduated two students through their entire high school experience and on to college.

### ANNUAL COMMITMENT:

Continuing an annual tradition, Affiliated asks employees, dealers and members of the community to help us choose from three worthy local charities in New Jersey and Texas to receive the coveted Affiliated Community Service Award. The organization with the most votes receives a significant financial contribution.

Prior recipients include the WISE Center YMCA Branch Senior Services, Alliance Center for Independence Community, and the Food Bank of New Jersey.

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## Q8

METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)

Affiliated utilizes a clear set of KPIs that the entire management team is focused on. Affiliated KPIs include:

- Alarm Response Time
- Speed to Answer
- Customer Service QA scores

Average operator response time to a signal is monitored constantly and displayed prominently on supervisor screens as well as on our 40 foot display wall. Supervisors make changes in staff allocation in based on these response time changes.

Affiliated uses an industry leading Workforce Management (WFM) software suite to manage our staffing and ensure optimization for our response times.

Our shift supervisors and alarm traffic managers use a real-time adherence dashboard created by our team of 20+ software developers. This dashboard gives the management team real-time actionable data and allows for agile decision making. Operators are shifted between queues and priorities throughout the shift in response to changing traffic conditions.

Our internally developed software tools provide customized reports measuring operator performance as well as showing any deviation from previously set Affiliated standards.

Examples that have enhanced our services include an advanced CTI (Computer Telephone Interface) which provide screen "pops" on incoming traffic, the introduction of IVR (Interactive Voice Response) technology for low priority signal notification and verification, and the increasing use of virtual software-based alarm signal receivers that have vastly improved signal throughput time.

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## Q9

**EMPLOYEE RECOGNITION** - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

Affiliated has engaged an external consulting company to help it ensure that its incentive and retention programs were meeting the needs of the team. We engaged with these experts to craft an environment that cultivates the right working culture and expectations for the applicants we are now hiring. The core of our incentivization and retention relies on the following:

- Internal Growth: We find that employees stay at companies where they see an opportunity for advancement. We highlight employee success stories and highlight internal postings. Employees are encouraged to grow within the company by enhancing their skills through cross-departmental training.
- Employee Recognition: Affiliated offers a suite of recognition programs including our quality assurance department's quarterly awards, our monthly recognition of employee anniversaries, our "Care Bonus" for employees who go outside the scope of their position to aid customers along with a traditional set of recognitions one would expect.
- Customer Feedback: We have prominent digital signage located throughout both monitoring centers and we highlight success stories we receive from customers.
- Employee Referral Program: Employees have become our best resource for attracting new talent to Affiliated.
- Benefits: A complete benefits package is offered to all employees including full medical, dental, hospitalization, and prescription drug coverage. Based on a survey of national call centers, our benefits were ranked in the top 10%.
- Retirement Program: A 401k program with employer match is offered to all of our employees after 90 days of service.
- Shift Premiums: Staff members who work overnight or weekend shifts are incentivized with a supplement to their base salary.

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## Q10

**QUALITY OF RECORDS** (Alarm history, recordings, etc.) - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

Data is one of Affiliated's most valuable commodities. As such, data on calls and alarm response are maintained for as long as practicable, and reporting on these metrics, as we have mentioned earlier, is critical to our success. Our leadership team is guided by the reports generated and trends exposed from the data collected and created by the monitoring team.

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## Q11

RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)

Affiliated has undertaken many efforts to improve the relationships between our dealers and their AHJs. We know that the alarm industry has a somewhat checkered reputation with many AHJs and response agencies, and as a face of the industry, we feel it is our responsibility to do everything we can to show our industry's commitment to the successful protection of life and property.

Fire Chief Initiative:

Affiliated created a multi-year initiative in coordination with our dealers to promote education among fire chiefs. We have conducted dozens of trainings and tours of our facilities in concert with our alarm dealers.

ASAP to PSAP:

Affiliated has fully implemented the Automated Secure Alarm Protocol (ASAP) to PSAP. Affiliated Monitoring was one of the first dedicated contract monitoring company in the nation to implement this system.

We have worked with TMA's ASAP to PSAP team to lobby PSAPs, AHJs and local political leadership to promote the advantage of and the continued adoption of the ASAP to PSAP program in additional jurisdictions. We are especially excited about our success in areas with significant population growth. To date, we have dispatched tens of thousands of alarms via ASAP that would have otherwise required a telephone call.

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## Q12

BUSINESS STRATEGY/CUSTOMER RELATIONS - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)

One of Affiliated's key pillars is partnership. Partnership is behind everything we do at Affiliated, as we see our dealers not just as our customers but as partners to which our own success is tied. With this in mind, we are as open and communicative with our dealers as possible, including regular email newsletters and direct telephone outreach from our dedicated account management team. We also engage in regular surveys of our dealer base to determine our NPS (Net Promoter Score), which helps us understand satisfaction levels and identify areas in which we may need to improve.

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### Q13

ENGAGEMENT WITH INDUSTRY GROUPS - Identify relevant industry association memberships that you center maintains. How does your company participate in or contribute to these associations? (5%)

Affiliated takes its commitment to industry associations very seriously. Affiliated principals and employees have dedicated thousands of hours to the industry.

The Monitoring Association (TMA):

Stanley Oppenheim, our President, has served on the board of The Monitoring Association for almost thirty years. His efforts on behalf of the association and the industry have been recognized by TMA multiple times. In 2008, Mr. Oppenheim was the recipient of the President's Award, and in 2014, he received the President's Special Recognition Award.

In 2009, Stanley was honored to receive the Stanley Lott Award, the highest award presented by the association.

In yet another example of following in his father's footsteps, our CEO Daniel Oppenheim joined the board of The Monitoring Association and just this year was named a Vice President of TMA. He also continues to serve as co-chair of TMA's ASAP-to-PSAP committee.

Positive outcomes of the Oppenheim family's involvement in the association include:

- The re-branding effort of the CSAA to The Monitoring Association.
- The success of the Insurance Liaison Committee
- The existence of the Burglary Protection and Fire Protection Manuals
- Participation in the creation of the ASAP to PSAP program
- Improvements to the technology behind the ASAP to PSAP program

Medical Alert Monitoring Association (MAMA):

Affiliated has taken a leadership role in PERS / medical alert monitoring and is one of the largest providers of PERS medical alert monitoring in the United States. In 2006, our CEO Daniel Oppenheim helped found the Medical Alert Monitoring Association, the industry trade association dedicated to the PERS industry. He has served on the board and in a number of capacities during the past 16 years. He was most recently President of the association, holding that role for six years.

New York Fire Alarm Association (NYFAA) / Fire Department of New York City (FDNY):

Affiliated employees have been consistent contributors of time to the NYFAA and its liaison efforts with the Fire Department of New York City. Affiliated executives served on the committee that negotiated the adoption of new fire alarm monitoring center permitting procedures.

Others:

Affiliated supports through financial and time contributions numerous local and state industry trade organizations across the United States. We also proudly host local events at no cost to the industry in both our Texas and New Jersey monitoring centers. Manufacturers as well as local alarm associations regularly use these facilities for meetings and educational seminars.



## Q14

### ADDITIONAL INFORMATION

Since our founding over 45 years ago, we have dedicated ourselves to our dealers, their customers, our industry and our community. We believe that this application for the award reflects not only our current capabilities and efforts but also the sum of our years of experience and devotion to the mission.

We humbly believe we are worthy of this award because of the following combination of efforts and achievements which make us unique in the monitoring industry:

#### Commitment to Innovation:

From assembling what we believe to be the largest in-house software development team of any monitoring services provider to our eagerness to apply new technologies, we feel we have helped to advance the state of the art in our industry.

#### Commitment to Continuous Improvement:

From our hiring of a Chief Learning Officer (CLO) to the implementation of the AlertMessage™ priority text chat platform, Affiliated has made investments in departments and areas which are often overlooked.

#### Commitment to Facility Design:

We believe our monitoring centers have set a new benchmark for design and the role of the monitoring center as a partner to alarm professionals. Feedback we have received from those who have visited our facilities confirm our belief; Integrating the functional needs of a central station while meeting the broader requirements that the modern dealer needs to attract and retain both customers AND employees.

#### Commitment to Core Values:

Though the alarm industry has evolved over the last 45+ years, Affiliated's commitment to providing its dealers with the most reliable monitoring services delivered by caring well-trained monitoring specialists has not changed. Our dealers rely on us to protect their customers and their own businesses, and we believe our application for this award reflects the seriousness with which Affiliated takes on that charge.

We take our core values so seriously that we begin every weekly managers meeting by repeating them and picking out an Affiliated employee who has demonstrated at least one of them over the prior week.

#### Our Core Values are:

- We Make Our Partners Happy
- We Treat Everyone with Empathy and Respect
- We Execute with Excellence
- We Own It and Follow Through
- We are Team Players with a Positive Attitude

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## Q15

Respondent skipped this question

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

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#8

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, February 26, 2024 1:43:39 PM  
**Last Modified:** Monday, February 26, 2024 1:55:12 PM  
**Time Spent:** 00:11:33  
**IP Address:** 96.60.248.155

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Page 1

**Q1**

Please provide the following information

Award Contact Name	<b>David Smith</b>
Company	<b>COPS Monitoring</b>
Email Address	<b>dsmith@copsmonitoring.com</b>
Phone Number	<b>9545455708</b>

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**Q2**

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

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**Q3**

TRAINING AND EDUCATION - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

The specific details of our proprietary evaluation/analysis and methodology (called Gradation) are proprietary and confidential, but we will share high-level information.

First, we believe that selecting the right people is crucial to the success of any training program, especially for a dispatcher position. We firmly believe that no one can perform well in this role unless they fit the job perfectly. Our hiring process is not limited to just experience, education, and attitude; we also evaluate specific underlying personality traits such as empathy, a sense of duty, the desire to help others, and a professional demeanor, among others. To ensure that we match the right person with the right job, we hired an Industrial Psychologist experienced in evaluating candidates for the job. We have also contracted with a company that specializes in helping to identify ideal candidates by having them complete an online personality trait profile.

The design of our hiring process, interview questions, personality profile screening, skills testing, proprietary algorithms, training, proprietary Gradation program, rewards, motivational, and retention programs were all designed with the assistance of an Industrial Psychologist with the goal of creating the industry's best monitoring team.

Though the process is complicated, the concept is simple: Hiring the wrong person for the wrong job results in poor performance and high turnover. Matching the right person with the right job results in better performance and lower turnover. However, by combining Industrial Psychology and our 46+ years of experience, we believe we can match the right person with the right job, train them extensively, give them regular feedback, reward and recognize them, and support them with a strong culture of like-minded individuals. The result? Much lower turnover and Superior Performance.

**DISPATCHER TRAINING:** After our extraordinary selection and hiring efforts, we are ready to begin training. In addition to being TMA Five Diamond Certified at a certain point during their training, every dispatcher starts with many hours of classroom-off-line training followed by many hours of tandem training where they are paired with an experienced dispatcher who supervises and helps them respond to limited/specific types of alarms.

After initial training, dispatchers begin our initial 18-month proprietary 6-level Gradation program that might just be the industry's most rigorous training and evaluation system. The proprietary program is an "up or out" process that is designed to accomplish three things: 1) help us identify and purge employees who do not embrace the values of the industry or fit within our culture of working in a fast-paced environment while maintaining a high level of excellence, 2) improve retention through recognition for those who demonstrate they are the very best in their roles, and 3) provide continual forward-moving reward system (recognition / continual raises) and ongoing motivation through goals and accomplishments. The system was created to be tough but fair. Gradation is highly detail-oriented and continues throughout the dispatchers' tenure to provide continual training, reinforcement, and cross-department instruction and to quickly identify any knowledge gaps. In the first year alone, each dispatcher receives a minimum of 12 evaluations on a total of 1,263 specific measurable skills.

Each dispatcher also attends a continual cycle of recurring training modules on the following targeted skills: Conflict Resolution, Handling Customer Emergencies, Customer Service Skills, Dependability, Disaster Preparedness (local office, local community, and nationwide), Empathy & Patience, Internal & External Communication, Interpersonal Skills, Knowledge of Company & Services Offered, Listening Skills, Multi-functional Dexterity (multi-tasking without sacrificing quality or efficiency), Problem-Solving, and Time Management. Select employees also receive HIPAA training depending on the dispatcher level and job responsibilities.

Those who reach Level 6 and can maintain the status enjoy higher pay, recognition, and periodic rewards (please see Question 10 – Employee Recognition)

**TRAINERS:** As a testament to our hiring practices and strong culture, we are proud to report that 96% of our managers started in an entry-level position. As a result, all our trainers were once dispatchers themselves and have many years of dispatching and central station experience. They are also highly versed in all the training mentioned above and have worked in some dispatch supervisory capacity. Our trainers are educated by other high-level managers using proprietary methods and tools we have developed over the past 46+ years.

**Q4**

DISASTER RECOVERY - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

We feel uneasy when we hear the term 'Disaster Recovery' because 'recovering' from a disaster denotes some measure of downtime, meaning we have already failed. Instead, we operate under a "High availability" or "Disaster Preparedness" mindset - with the goal of providing "failsafe" monitoring and preventing downtime. However, we do have a comprehensive Disaster Recovery plan that exceeds UL requirements at every measurement. We were also among the earliest pioneers of failsafe monitoring when we established our first redundant location over two decades ago, far ahead of other companies.

As a high-level overview, all our sites are networked, staffed 24/7, and actively share in handling the alarm traffic. With real-time load sharing, our 'backup plan' is essentially always in effect as an ordinary course of business, meaning if one site "fails" or cannot monitor for any reason, there is no "disaster recovery plan" to enact since the other sites are already actively monitoring. Services continue uninterrupted at normal service levels, even during unexpected events.

Though we are prepared for technical and communications issues with an exceedingly high level of technological redundancies and failovers, our experience has taught us that service interruptions and staffing complications come from more probable causes, such as severe weather, flooding, hurricanes, snowstorms, and even civil unrest. One careless placement of a backhoe can disable a monitoring center altogether. All of these can negatively impact other monitoring companies' response times because they simultaneously 1) significantly increase alarm activity and 2) cause difficulties with the ability to get staff to and from work.

While we can easily redirect ALARMS and PHONE CALLS to other sites, NO COMPANY can "redirect" STAFFING if one site is inoperable. This clearly demonstrates the equal importance of both TECHNOLOGY and PEOPLE in a robust disaster preparedness and recovery plan. We certainly feel our disaster plan is among the best in the industry and hope you will too!

**TECHNOLOGY:** We operate 3 hot-redundant, real-time load-sharing sites with mission-critical technology in multiple locations (receivers, automation, communications, etc.). Each site also has diversified communications paths that utilize several IP/telephone carriers and telecom facilities, using diverse routes to our facilities (triple-redundant at each site), both aerial and underground feeds from different telephone carrier COs. Suppose these local layers of communications or equipment redundancy fail; in that case, our geo-diverse central stations allow us to AUTOMATICALLY redirect signal traffic to another location to overcome a local outage impacting a single facility. If a single connection path goes down, all in-process calls and alarms will fail over to our other locations and continue without interruption. As an added layer of disaster preparedness, we have also contracted with Bold's Manitou Receiver Cloud as a backup to alarm receivers at our sites.

Striving to build the highest availability environment takes both leadership focus, a commitment to hiring the needed expertise, and financial support. Several components of our infrastructure are being upgraded (both hardware and software platforms). From Q4 2023 to Q3 2024, we will have made more than a \$1,000,000 investment into our network and systems to provide leading technology and further harden our resiliency.

**PEOPLE:** We feel that distributed staffing is a critical and often undervalued element of disaster plans. After all, what is professional monitoring? It is a connection to a live person when you need them most. However, NO monitoring company can adequately support 100% of their customer base and provide acceptable response times with just 50% (or less) of their staff if one site were offline. This is precisely what happens if a company with just 2 locations loses the ability to monitor at 1 site. Each COPS site is comparably staffed, which is extremely important – especially during an outage.

Staffing diversification also makes COPS better prepared for things like outbreaks (COVID-19) since our staffing is separated across different states. This advantage is considerable over companies with fewer sites or cold backup locations. If something unexpected were to happen to one of our monitoring stations, we still have enough staff at our other locations ready to handle alarm traffic with acceptable response time. Plus, we can over-staff each of our other sites to compensate for the loss of a site, bringing our staffing levels near 100%.

We have a short video that illustrates how our redundancy and staffing react in real time to local conditions:  
<https://www.copsmonitoring.com/redundancy>

## Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

**TO IMPROVE SECURITY:** We believe that even the best technology is useless and could even prove harmful unless it is deployed or maintained correctly. For instance, did you know that the Equifax breach in recent years exposed the personal information of 147 million Americans that could have been prevented with a software patch that had already been released? In other words, human failure contributed to the data breach. What you probably didn't know is that the hackers went 76 DAYS undetected, accessing 51 databases on Equifax's servers. There are an average of 2.5 hacks per day in the U.S. alone. In January 2024, there was a supermassive breach comprising an astounding 12 terabytes of information, spanning over an astonishing 26 billion records. The leak, which contains LinkedIn, Twitter, Weibo, Tencent, and other platforms' user data, is the largest ever discovered. The reason? A "firewall misconfiguration," which was fixed (after the data was stolen, of course).

Ransomware attacks are on the rise, which can be introduced on your network with a single click of a phishing email from a well-intentioned employee. 91% of successful data breaches started with a spear phishing attack, the average ransom is \$1 million, the average downtime is 29 days, and almost 20% of the companies never recover their data. Imagine a monitoring company down for 29 days!

Situations like these should be a concern to every monitoring company. However, our expertise is monitoring, not cybersecurity, which is why we sought out independent verification from experts in the field.

In 2017, we became SOC 2 certified. We believe we are the first monitoring company ever to attain this certification (and may still be the only one). Like a UL certification, SOC 2 provides independent verification that we have security, systems, and control procedures in place to safeguard our dealers, subscribers, and their sensitive information reliably. Unlike a UL certification that takes days (maybe up to a few weeks), a SOC 2 certification takes 6 months. We believe a UL listing is essential for all monitoring companies. However, like all standards, it creates minimum requirements for certification. SOC 2 addresses areas that UL does not standardize, and we are surprised that more monitoring companies are not pursuing this critical certification.

We utilize two-factor authentication regarding employee credentials, perform periodic network penetration tests (by a leading cybersecurity firm) and randomly test all employees with phishing tests that provide immediate feedback if someone clicks something they should not have opened. In addition to utilizing Mimecast, Palo Alto firewalls, CrowdStrike, and other cyber-related safeguards, we also carry cyber insurance should something unexpected occur within our system.

**TO IMPROVE SERVICES:** In addition to the multiple layers of "Fault Tolerance" in our critical systems that we mentioned in a previous question, COPS is the only wholesale monitoring company in the industry with its own UL-listed monitoring platform (called Generations). Along with Generations, our in-house team of programmers has also developed MPower dealer and subscriber access and several tools that monitor and report on our monitoring system, HR/Training systems, network, and many other mission-critical systems. Over the past several decades, COPS has continually enhanced MPower using the input from Dealers to give them the specific tools they need to run their business. We are getting ready to launch MPower 2.0, which is more powerful and built on a platform that will allow us to deliver new and exciting tools to our dealers.

**BUSINESS INTELLIGENCE:** With thousands of dealers representing millions of monitored accounts, we handle over a half billion signals per year and interact with customers millions of times per year (from the monitoring center alone). All this, combined with the thousands of our own employees, scheduling information, and quality statistics over the decades, means that we have a MASSIVE amount of data at our disposal. The analysis of the data and accurate forecasting are critical to the success of our company in many ways, such as creating extreme efficiencies, cost control that we can pass along to our dealers, informed business decision-making, reward structure for employees, helping our dealers make decisions and avoid pitfalls, and so much more.

It's difficult to share specific details of our analysis without revealing trade secrets or competitive advantages, but at a high level, some of the metrics we monitor include: predicting alarm activity and inbound telephone call patterns for staffing; types of alarms to

assist with skills-based staffing; alarm-to-accounts ratios for each individual alarm dealer and customers to identify irregularities and potential false alarm issues quickly; use of electronic alarm verification and notification services and how they affect signal and call rates; the impact of the pandemic on businesses based on certain metrics to predict attrition. This data (and more) helps us to determine OPTIMAL dispatcher productivity services levels to 1) prevent over-staffing, 2) keep dispatchers interested and engaged, and 3) prevent burn-out. We track response times with auto-alerts for threshold exceptions; systems uptime and performance; calls made, received, and answered along with talk time; number of calls to reach a customer (so we can make adjustments); analysis of customers giving incorrect passcodes to assist with retraining or system enhancements; complex employee performance and evaluation scores, employee turnover, and much more. We also have an internal proprietary system that collects dealer and customer complaints to determine the ratio of issues reported to problems substantiated so we can objectively track our service levels.

**TECHNOLOGY TO IMPROVE EFFICIENCY:** Balancing technology and efficiency is also essential. Over the past few years, we have been leveraging our technology, such as IVR, SMS, & MyAlarmChat (see next question), to improve the customer experience and the speed and efficiency of information delivery. By doing so, we have reduced non-emergency traffic to such a degree that we were able to reduce the number of monitoring centers while improving response times. The efficiencies gained have been magnified by new workforce management tools that have helped us better control staffing - our most expensive resource.

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**Q6**

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

COPS takes false alarm prevention seriously and offers several false dispatch prevention and mitigation measures.

VIDEO: Video verification helps reduce false dispatches (and escalate response when necessary). To support the current demand and prepare for future growth of professionally monitored video, we created a branded service called AlarmWatch Video that supports hundreds of existing cameras and NVRs. (<https://alarmwatchvideo.com>). Alarms are handled by a designated group of operators specifically trained to monitor video.

ECV: We have enhanced ECV capabilities by allowing up to four numbers before dispatching authorities. Other false dispatch reduction methods include duplicate signal suppression rules to prevent repetitive dispatches.

CHAT: Though ECV (Enhanced Call Verification) has proven to be valuable in reducing false alarms, we have found that many people do not answer the phone when we call to verify alarms. Instead, it has become very apparent that most people prefer text messages to phone calls and voicemails. MyAlarm.Chat is a free service that leverages the preference for text messaging by sending an immediate SMS message upon receipt of an alarm. The message includes a link to a secure group chat room experience where users communicate to make informed decisions about canceling or escalating alarm signals.

Today, we have over 250,000 customers using MyAlarm.Chat. Just by communicating with customers the way they prefer; we have reduced false dispatch rates by 67% when chat is used in conjunction with electronic cancel signals! This represents a more significant reduction in false alarms than any other program or technology.

FEATURES: COPS also offers a service called "Suspended Dispatch" that can remove the dispatch instructions and telephone numbers from accounts for several days when a new account goes online with us. This allows new customers to learn and interact with their systems without the fear of dispatching. After the initial learning period, when customers are comfortable using their systems, the dispatch instructions and numbers are automatically added to the account. A dealer may elect to activate dispatch suspension on all new accounts or individual accounts to help reduce false alarms during the first few days of owning their new alarm system.

TOOLS: We utilize several proprietary tools in our monitoring software to help our dealers identify and modify handling on high-activity accounts and our in-house produced online video tutorials to assist with dealer education and step-by-step instructions on how to enter and edit accounts properly.

PROACTIVE SUPPORT: Using the data and analytical point we mentioned in a previous question, we have a team dedicated to proactively analyzing alarm data and dealer activity to identify ways to modify alarm response to improve the customer experience and reduce false alarms using modified alarm handling techniques on repeated zone trips; we vigorously pursue dealers to fix accounts in excessive activity and runaway status.

LITERATURE: We provide complimentary end-user literature to our dealers to let customers know what to expect. For instance, we have a leave-behind brochure called "Knowing Your Monitoring Station" that educates the alarm users on how an alarm signal is sent, our procedures, and terminology along with a tear-out passcode card. We have found that with information that is both easy to understand and sets clear expectations, customers do a better job preventing false alarms.

PENALTIES: As a very compelling motivator to eliminate false alarms, we even charge dealers for excessive activity if the issues are not addressed on the same day. To help dealers void penalties, we proactively send notifications to dealers for their most active accounts to help them reduce false alarms.

## Q7

COMMUNITY ACTIVITIES - Detail how you help employees engage in community activities and causes. (10%)

Giving back to our communities is extremely important to us, and we have a longstanding tradition of doing so. With a strong presence in 3 states and a large team of caring individuals, we are fortunate to be able to touch so many lives in so many different ways.

COPS regularly supports or holds company-sponsored charitable fundraisers, hosts blood drives, donates to the Red Cross after emergencies, and supports other local initiatives. For the past 10 years, COPS has supported sponsored Mission 500 at ISC West and other events. One of our favorites with Mission 500 is the annual school kit build that donates supplies and backpacks to every child at a Title I school near our Florida location. The backpack also includes a note of encouragement to the child and a notification to the parent or guardian that we are hiring close by. We have also sponsored the ESA's annual Youth Scholarship for many years.

During the height of the COVID-19 pandemic, we donated laptops to a VA Memorial Home in NJ so its quarantined elderly residents could be reunited with their loved ones through video chat, resulting in reduced anxiety, improved spirits, and better overall health. The gesture was recognized by New Jersey Senator Steve Sweeney, Governor Phil Murphy, and NJ First Lady Tammy Snyder Murphy.

While giving back as an organization is important, we believe that our employees' individual coordinated efforts to make a difference in their local communities are what truly showcase our team's personal dedication to "people helping people" – the cornerstone of our industry.

Here are some of the organizations our employees in New Jersey, Florida, and Texas have taken upon themselves to support: Children's Miracle Network; Second Harvest Food Bank; Eleanor Corbett House - Safe Haven for Women - SPCA fundraiser and drive; Holiday Giving Tree; Mental Health America MHA; Toys For Tots Drive; John Hopkins Children's Center Toy Drive; Donations to Local Food Banks; Freedom Church Toy Drive; Freedom Church School Supplies Drive; Bea Gaddy Family Center Toys, Food, and Clothes Drive; Fund Raising for Animal Rescue; Food Relief for Bahamas Hurricane Victims; Children's Home Toy Drive; Walk for Autism; Thanksgiving Food Drive For 'Monroe Lead The Way' (Help those in need within our community); Drive to Support Local Food Pantry; Monroe Township Sports Program Donations and Sponsorships; Collection for Alzheimer Awareness Foundation; Collection for Bella's Cause (Autism Support); Donated Money and Supplies to Victims Of Local Fire.

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**Q8**

**METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)**

As stated previously in this application, we recognize the significance of our organization's enormous volume of data. We leverage this data to closely monitor our performance, ensuring that we adhere to our high standards in quality, speed, accuracy, and procedure adherence. Within the organization, we have several proprietary qualitative measures, and three of the most crucial ones, particularly concerning alarm monitoring, are as follows:

1. **Alarm response time:** Consistently reliable response times are crucial to maintaining customer confidence. We closely monitor our response times in real-time, and over the past 12 months, our average response time for 3.3 million priority alarms (burglary and higher) was only 20.9 seconds. Response times for medical, panic, and fire alarms are even faster. We take pride in being the only monitoring company to publish its response time to alarm signals on their home page.
  2. **Productivity Levels:** We regularly monitor the productivity levels of our dispatchers to ensure that we maintain the optimal staffing levels and appropriate workload for each dispatcher. We understand that overworked employees cannot provide the necessary level of service to maintain the proper balance between friendliness and professionalism. Similarly, idle staff can become distracted, bored, and detached, leading to a reduction in service quality. Maintaining a properly balanced productivity level is crucial in helping us deliver our desired alarm response time and ensure the quality of service our dealers and customers depend on.
  3. **Founded Inquiry Ratio:** COPS' team of programmers has developed a proprietary tracking program to monitor quality, accuracy, and adherence to standards and procedures. This program collects and measures error ratios based on end-user and dealer inquiries, random alarm event inspections, and random call recording reviews. The system helps us to ensure that any potential problems are exceptions and are appropriately addressed before they have a chance to become systemic. We measure our error rate against every 10,000 alarm activations. Charting this data helps us to easily identify trends that need to be addressed through systemic system improvements or staff education.
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## Q9

**EMPLOYEE RECOGNITION** - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

At COPS, we often refer to our "esprit de corps," which means a feeling of pride, fellowship, and common loyalty shared by the members of a particular group. We place high importance not only on our people but also on our unique culture and how we function as a team. Our people are not only responsible for our professional monitoring, but they are also the lifeline to our customers in their greatest moments of need. Above all, we believe that attracting, qualifying, and retaining the right kind of people is the key to our success. We take pride that our average tenure across all our employees is over 7 years. 50 employees have been with COPS for over 10 years, and some even for 20+ and 30+ years. What is most telling is that 96% of our upper-level positions are filled by employees who once started in entry-level positions, giving COPS a substantial depth of knowledge, and indicating that we are doing something right!

The secret isn't just from 'esprit de corps' and shared mission, but also because our employees enjoy many traditional benefits such as flexible hours, extremely competitive pay, above-average health benefits (mostly paid by COPS), vacation time, active encouragement of a healthy work/life balance, tuition reimbursement, gym membership discounts, discounted AAA membership, 401(k) with a very generous company match, regular pay increases, proactive market and situational pay raises, periodic and annual bonuses, discounts on computer equipment and cell phones, along with some other unique incentives to ensure our employees stay sharp, motivated, and excited about COPS and the work they perform. All told, we estimate we have reinvested more than \$5 million back into our employees in the last 2 years (millions in recurring expenses).

As previously explained, our proprietary Gradation program is divided into 6 progressively challenging levels. Once an employee reaches level 6, they become eligible for our employee incentive program, known as 'Club 6'. This reward program is exclusively designed for experienced dispatchers committed to excellence. To qualify for Club 6, employees must pass their quarterly reviews and complete the 18-month qualification period. Once an employee qualifies for the program, they are rewarded each quarter with a day off and an all-expenses-paid elaborate day trip for themselves and a guest. Many of our staff members are part of Club 6 and enjoy unique excursions four times a year, creating unforgettable experiences with other members and their guests. These excursions may include trips to amusement parks, sporting events, plays, museums, lavish dinners, and other unique experiences. The success of Club 6 is not only due to team-building exercises but also the fact that guests are invited. It's a way to recognize and acknowledge our employees' hard work and dedication. When guests point out that their company doesn't do anything like this for them, it makes our employees feel proud to work for COPS Monitoring.

At a higher level, our operations shift managers who oversee dispatcher shifts on a daily basis are rewarded with an annual Shift Manager Retreat paid for by the company. Each shift manager from every site is invited to attend, along with a guest of their choice. The destinations for these multi-day retreats have included Las Vegas, the Bahamas, Mexico, Aruba, Grand Cayman, Vail, Disney World, and many others. These trips are designed to balance work, education, and play, and serve as an excellent team-building initiative for the company. They also help ensure that each of our monitoring stations remains in sync and is properly administering our proprietary Gradation program.

We organize additional trips and events throughout the year, such as company picnics and appreciation events. These events are designed to celebrate each other, mark another successful year in business, and show our appreciation for our employees who make it all possible.

We also have a longstanding tradition of hosting extremely extravagant holiday parties for all of our locations with fantastic food, entertainment, and lavish prize giveaways.

## Q10

**QUALITY OF RECORDS (Alarm history, recordings, etc.)** - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

We retain records from our UL-listed monitoring software system for 7 years. This includes all alarm activity, account details, and service/billing information.

All operator voice interactions are recorded and saved for 3 years. We closely monitor and measure our performance to ensure quality, speed, accuracy, and adherence to standards and procedures. We have multiple qualitative measurements within the organization and have outlined them in previous questions.

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## Q11

**RELATIONS WITH AHJs** - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)

COPS highly values its relationship with AHJs (Authorities Having Jurisdiction) across the United States. We actively participate in various state and local-level associations and maintain regular communication with authorities throughout the country. Our company has a track record of hosting dealer meetings at all our locations and have extended invitations to association representatives and AHJs to attend and present to our dealers. Additionally, we have sponsored events hosted by AHJs. We are proud members of TMA, SIAC, ESA, and AICC, which strengthens our support of the industry and its relationships.

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## Q12

**BUSINESS STRATEGY/CUSTOMER RELATIONS** - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)

We highly value our relationships with our dealers and make a point to meet them in person whenever possible. In the past, we have hosted face-to-face meetings at all our locations and have also held meetings in conjunction with national industry trade shows such as ISC West/East and ESX, as well as trade shows hosted by local and state associations. However, due to the pandemic, we had to shift to email communication, and we organized over 30 webinars on various subjects to stay connected with our dealers. These webinars were interactive, where dealers could ask questions and participate in the discussion.

As things started to return to normal, we resumed in-person events in 2022 and launched our SYNERGY Conference in Orlando, FL, Dallas, TX, and Philadelphia, PA – where our Keynote Speaker was a Ret. 3-Star USMC General. The SYNERGY Conference is based on the idea that "the whole is greater than the sum of its parts." In other words, individual parts cannot achieve the same results as they can when they work together. Similarly, dealers, vendors, and professional monitoring all depend on each other to exist, and we can only achieve a certain level of success through the synergies we create. Working together and leveraging our unique strengths helps us all reach our full potential in protecting customers and growing our businesses. If you want to learn more, please visit <https://synergyconference.com>.

For more personal interaction, we have Account Executives assigned to specific dealers who proactively contact and travel to dealers' offices to share information and to provide proactive support. Dedicated Relationship managers, as well as a team of Dealer Support Representatives, are committed to supporting our dealers.

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**Q13**

ENGAGEMENT WITH INDUSTRY GROUPS - Identify relevant industry association memberships that your center maintains. How does your company participate in or contribute to these associations? (5%)

Over the past 46 years, members of COPS have been actively involved in several industry associations, served on various industry boards, and contributed to signaling and training standards. Our Dealer Support Manager currently serves as the Director of the New Jersey Electronic Life Safety Security Association. Our Account Executives who reside in different states are also involved with the associations in their assigned states.

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**Q14**

ADDITIONAL INFORMATION

We appreciate the opportunity to apply for the TMA Monitoring Center of the Year award, and thank you for reading our detailed responses. While we hope our answers give you some insight into our company, we believe it is impossible to fully capture the time, effort, and expertise that goes into running a modern monitoring facility.

Another thing we wanted to mention relates to our decision to operate smaller monitoring centers in different states, rather than larger mega-centers. They are not just for technical and staffing diversification but also to ensure our team members feel valued and invested. Our approach to smaller sites fosters a sense of community and teamwork and enables us to hire talented individuals from different job markets.

Lastly, we understand that many dealers still prefer local monitoring, and we can accommodate this better than most companies due to our presence in multiple states. We have also created a short video that highlights the value of our 'hometown' monitoring approach:  
<https://www.copsmonitoring.com/local>

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**Q15**

Respondent skipped this question

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

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# #10

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, March 07, 2024 10:28:29 AM  
**Last Modified:** Thursday, March 07, 2024 10:46:31 AM  
**Time Spent:** 00:18:02  
**IP Address:** 71.176.65.180

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Page 1

## Q1

Please provide the following information

Award Contact Name	<b>Christopher Denniston</b>
Company	<b>Rapid Response Monitoring Services, Inc.</b>
Email Address	<b>christopher.denniston@rrms.com</b>
Phone Number	<b>315-956-1051</b>

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## Q2

**Enterprise (40,001 subscribers or more)**

Which Monitoring Center of the Year category are you entering?

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**Q3**

TRAINING AND EDUCATION - Please provide detailed information on your new hire and on-going training programs. Please specifically address content, testing, evaluation/analysis, and methodology. Share the qualifications and training for your trainers. Define additional training modules and target skill sets. Explain how you determine and address training and knowledge gaps over time. Describe how training programs are allocated and include any incentive programs that you have implemented around training. (25%)

Employee training is a cornerstone of Rapid Response. We believe how we hire and train our team members is a vital differentiator in our industry, especially since we are hiring tomorrow's leaders today.

All Rapid Response new hires must successfully complete a rigorous six-week training program. This course is identical for each of our three facilities. Training begins in our state-of-the-art classrooms equipped with touchscreen displays and advanced computer systems designed to maximize the learning experience. Over several weeks, classroom trainers introduce new hires to the industry and teach them how alarm panels work, how to navigate our automation platform, follow action plans, respond to the various alarm types, how to deliver unmatched care, empathy, and concern to our Dealer's customers and much more.

One of the most unique aspects of our program is how we engage trainees in adverse situational awareness training. Protecting life and property is as important as it is challenging at times. We place trainees in mock scenarios designed to feel like the real thing. We subject them to easy situations and to some of the most difficult scenarios a Monitoring Specialist could ever experience. Our goal is to present them with the challenges in training, so they are fully prepared for the real thing.

In addition to a classroom training environment, new hires also experience working in the monitoring center under the instruction of our Training Specialists. Here they are exposed to what alarm monitoring is like in the monitoring center environment along with how to utilize the incredible support that management and fellow team members provide.

Successful completion of the course includes passing grades on weekly tests and an 85% or higher on the final exam which is written and practical. The hands-on component is a custom-designed simulator that puts the trainee through a gauntlet of real-world situations that they must respond correctly to in order to pass. Failure is not an option. Our Dealers depend on our service, and we take that mission seriously. Those that don't make the cut will not move forward as a Rapid Response employee.

Our Training Team is made up of team members that have either an educational and training background or years of experience within our Monitoring Centers.

After the initial training, Specialists have the opportunity to grow their knowledge over time, building upon their skills to achieve new skill set levels such as two-way voice, video monitoring, DoD monitoring or Sonitrol. There are a total of 16 different skills that they will learn over the next 18 months. Each skill requires training and testing to ensure that no Specialist will be presented with an alarm event that they are not trained on.

Our Quality Assurance team continually reviews calls from all Specialists and identifies retraining opportunities and ways to enhance the initial training course. If a knowledge gap is identified, that team member may return to the classroom or train with a mentor.

As an employee grows and their knowledge expands, they are eligible for pay increases based on the skill sets they achieve.

Another unique aspect of our training is our approach to new technologies. We have a dedicated team that works with new vendors, new alarm systems, and new response plans. Custom training modules and documentation are made for each and Specialists engage in specialized training before a new technology is approved for monitoring.

Lastly, we dedicate substantial training resources to our Hosted Monitoring Dealers. These companies have opted to migrate their alarm automation and signal processing to Rapid Response and utilize our system to provide customer monitoring from their own center. Our training team generates custom materials for each Hosted Monitoring Dealer and trains them in the same way we train our own team members to set them up for success.

## Q4

**DISASTER RECOVERY** - Please explain your center's disaster recovery solution. Provide details relevant to its scope, how you train to the plan and how/when you test the plan. (Note: It is acceptable to submit a copy of the outline page of your plan.) (10%)

Disasters come in many forms. They can be a storm, earthquake, or other natural disaster or they can also be a cybercrime, a pandemic, or a fiber cut three states away.

We are one of the only centers that has two geographically separate full-load data centers. We have enough capacity in both centers to run the entire operation. This includes all phone lines, internet, alarm receivers, servers, etc. We switch primary usage every month and run both centers in an active-active mode. All servers, receivers, and telephone systems are hot all the time and are designed to process alarms in parallel. We don't just test failovers, we switch and run each center every month which gives us confidence that everything will be fully operational when it's needed.

However, it's not enough to just have redundant infrastructure, you also have to be able to process the signals when they come in. Most monitoring providers have a larger main office and then a smaller one somewhere else that they call a DR center. Rapid Response has three facilities that are all working together with enough staff to manage the load even if one center goes down.

In addition to having three fully staffed Monitoring Centers, we have an Interactive Voice Response (IVR) system utilizing natural language speech recognition. This application runs within our dual data centers and works similarly to voice assistants, like Siri, that we've all become accustomed to. In fact, our IVR can do everything but handle a dispatch, and it does so while maintaining a fully natural speaking tone, not a computer-generated voice. It can call and get passwords and call RPs to notify them of alarms. Our system supports up to 400 ports of this application which can be deployed during any kind of disruption.

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## Q5

**USE OF TECHNOLOGY** - Explain how technology is used to support business intelligence for monitoring operations; customer support; training; sales and marketing; HR; accounting; and, end users/subscribers. (10%)

We maintain one of the largest Software Development and Technical Services teams in the business. All members are fully on-staff employees, not contractors. This positions us to develop and maintain our own automation platform and tools that are proprietary to Rapid Response and our Dealers.

Our custom-engineered automation platform provides us with unlimited metrics that are used to manage nearly everything. A breakdown on some of the key metrics is included in question eight particularly as they relate to monitoring operations.

With regard to customer support, we harness data and generate actionable reporting that is celebrated by Dealers. One of our favorite Dealer quotes is "I know more about my accounts now than I did when I was monitoring them myself!" Our Signal Management Team responds to abnormal signal activity and works closely with Dealers to resolve any issues (often with the panel programming or communication path).

As mentioned in question number one, training is a key part of what makes Rapid Response successful. Use of technology is a big part of that. Our advanced training facility features giant touchscreen displays and computers systems that provide an enhanced learning experience. We use technology to simulate an immersive situational awareness training that "places" the trainee in the most difficult monitoring scenarios to train them for success.

On the Sales and Marketing side, we embrace the latest technologies used by people to communicate important messages or to connect. Platforms like LinkedIn have often replaced use of business cards and now serve as a way to reach customers with news, updates, or just to check in. Our Dealer portal incorporates real-time notifications as well as a marketing suite where Dealers can customize a profile and download custom-branded marketing materials that help them sell services to their customers.

Our Human Resources team has incorporated the use of apps and an employee intranet to engage with employees.

Accounting is driven by data from our automation platform. Invoicing is based on the services used, but more importantly, analysis of the services used helps to illustrate the types of services that are most widely adopted.

Today's end users demand technology, and we deliver. We arm our Dealers with custom branded end-user facing apps, web portals, and interactive SMS services that meet their customer needs.

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## Q6

**FALSE DISPATCH PROCEDURES/REDUCING FALSE ALARMS** - Explain standard alarm procedures and how your monitoring center uses technology to reduce false dispatches. Outline your approach for identifying offenders and corresponding remediation. If applicable, identify any training programs that you have developed for key stakeholders, inclusive of employees, end users, or others. (10%)

Rapid Response has been hyper-focused on reducing dispatches for decades. We started with bi-directional SMS messaging back in 2011. That was a game changer back then, but it was hard to convince many Dealers that it could change things.

In 2013, we rolled out our first rapidSMS application. This application was different because not only did it have bi-directional communication with the Monitoring Center, it also provided a chat service between people on a call list.

In 2020 in response to the COVID-19 pandemic, we launched rapidSMS gen 2 and pushed all of our users to it. This immediately resulted in a reduction in dispatches by 42%.

Since then, we have established new reporting for clearance levels and we are pushing to get Dealers to maintain clearance levels above 90% or higher.

All of this is in addition to following CSV-01 protocols and our belief that no other contract monitoring center comes close to what we do to reduce, track, and report false alarms.

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## Q7

**COMMUNITY ACTIVITIES** - Detail how you help employees engage in community activities and causes. (10%)

#TeamRapid cannot be successful without the support of the communities in which our teams live. It's important for us to give back locally and engage our team members too as well.

We support many local charity organizations through fundraisers and walks/runs including Breast Cancer Awareness/Research, Suicide Awareness, and Pediatric Cancer Awareness/Research just to name a few. We also support the environment in our communities through Adopt-A-Highway, Earth Day Cleanups, and Arbor Day tree plantings. #TeamRapid has a lot of love for animals, so we hold pet food drives and organize volunteer outings at pet shelters.

During the holiday season, we come together to fundraise for local children's hospitals and hold toy and food drives for families in need.

Arts and sports are important to our communities and our staff too. We support a variety of local performing arts and collegiate as well as professional sports teams through sponsorships and ticket purchases which are given away to our team members in appreciation of their hard work.

We encourage our team members to participate in our many community activities and we capture the moments on video and photo for all team members to enjoy. Making an impact is incredibly important to our team and being active in the community is just one way we accomplish that.

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## Q8

METRICS - Identify KPIs and frequency of reporting. Explain how these reports are used to manage day-to-day operations. (10%)

We are a data-driven company with the mindset that you cannot manage what you don't measure. We track overall use in tenths of seconds to make sure that when time matters, we are counting fractions of seconds not minutes or hours.

We use metrics for almost everything, but here are a few major areas relevant to this specific question.

- Employee Attendance
    - Employee shrinkage and effectiveness
    - COVID-19 cases and regional stats
    - Overtime
    - Weather and how it might affect staffing
  
  - False Alarm Rates
    - Every Dealer is rated on their clearance rates
    - Stats and types of dispatches are shared with management every eight hours
    - ASAP-to-PSAP stats
  
  - Alarm Response Times
    - Real-time dashboards with current in-queue response times are running in all facilities and closely monitored by Monitoring Center management
    - Average times for every alarm type are sent out to management via SMS and email every eight hours
  
  - Staffing Levels
    - We have been using a workforce management platform since 2003. Our platform analyzes data from our phone switch, our automation system, and seasonal weather patterns to identify the number of Monitoring Specialists that need to be working at any given time to reach our preset service levels based on alarm type. The result is a staffing metric specific to every 15-minute period in a day, which allows us to assign people to one of our 48 shift start times.
  
    - We also have break and meal scheduling integrated into the workforce management platform. This allows us to manage how many staff members are in the seats based on the current activity, the people going on and off shift, and the expected traffic coming in the next 15-minute period.
-

## Q9

**EMPLOYEE RECOGNITION** - Explain your center's approach for recognizing employee excellence in areas of productivity, Q/A scores, attendance, etc. Provide information on any employee referral programs and retention bonus programs. (5%)

Our employees are our greatest asset, so we are thrilled anytime we get to celebrate them.

**Milestones:** We celebrate employee milestones with recognition on internal monitors, our company intranet, employee newsletter, features on social media, and recognition gifts.

**Outstanding Performance:** We applaud our team members' outstanding performance anytime life and property are protected or saved. We share these success stories through our employee newsletter, intranet, and internal displays in appreciation of a job well done and to emphasize the importance of the impact our team makes every day. We have also made videos where team members can share their successes with others. These appear on our website today.

**Employee of the Quarter:** Each quarter, Rapid Response selects one employee on which to bestow the title of Employee of the Quarter. Management submits nominations of employees based on their merits and the nominations are reviewed by executive management who selects the top performer for the honor. The EOQ is recognized in our employee newsletter, on social media, on internal display screens, and attends a luncheon with the company President.

**Attendance:** We salute those who have stellar attendance and recognize their achievement and dedication to the team and to Rapid Response.

**Reward Programs:** We utilize reward programs such as STRIVE and Awardco to recognize Q/A scores, productivity, and performance for all monitoring center personnel. These are valuable tools for our management team, but more importantly, the programs are enjoyed by the staff and they get the opportunity to select their method of recognition. Many select Rapid Apparel and proudly wear the Rapid logo as a showcase of their achievements.

**Referral Programs:** Our employees are our best recruiters. Our referral program features a new contest every quarter that utilizes a point system and an ever-changing set of rewards to keep things exciting. Referral bonuses are often as high as \$3,000!

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## Q10

QUALITY OF RECORDS (Alarm history, recordings, etc.) - Detail your center's records retention process, including its approach for alarm history and phone calls. Explain how you use history to evaluate current challenges, productivity, and effectiveness. Lastly, how is history used to understand current business, customers, and employees? (5%)

Maintaining quality records is a vital part of professional monitoring. We maintain all alarm history, including call recordings and video for a minimum of seven years. The data is redundantly stored in two Rapid Response owned fully secure data centers that are geographically separated. The data is accessible by our Dealers on our proprietary app or web interface the moment a call or alarm ends.

Every Email or fax Rapid Response has received over the last 15 years is attached to the account as a digital document allowing the Dealer or a Rapid Response team member to easily view and track account information and changes. Account changes made by Dealers or end-users via secure apps or web portals are logged to the account in such a way that you can see who made the change and what information was on file before and after.

Our Quality Assurance team reviews calls and processed alarms for every Monitoring Specialist monthly. They review for process and procedure, but also delivery of care, empathy, and concern. Outstanding service is celebrated and less than perfect service is used as a retraining opportunity and if trends are found we use them to enhance our initial training course.

We closely track alarm activity metrics to understand trends across the business, but also at the individual Dealer level. Our Dealer web portal provides Dealers with instant and historical data that can be used to manage their business and support their customers. We also hold regular meetings with Dealers and provide health reports on their account base.

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## Q11

RELATIONS WITH AHJs - Explain how your monitoring center works with public safety to increase effectiveness, reduce false alarms, and increase awareness of industry trends, technology, and contributions. (5%)

Even though we are a nationwide provider, we spend a fair amount of time working with AHJs.

We have a proprietary jurisdictional database that tracks every permit and ordinance requirement across North America. There are approximately 65,000 AHJs and we have a ten-person team that calls every one a couple of times a year to see if anything has changed in the jurisdiction and what we can do to help with any issues they are encountering.

We are members of APPCO and NENA and are active in both.

We attend almost every local, regional, state, and national alarm association meeting or event and interact with AHJs routinely. This includes TMA events.

We sponsor tours and training on how ASAP-to-PSAP works on our end for PSAPs who are interested in understanding what we do. Hundreds have visited our facilities over the years.

We also work with AHJs on many of the standards bodies we are on and seek their perspective on things all the time.



## Q12

**BUSINESS STRATEGY/CUSTOMER RELATIONS** - How do you approach and manage communications with your customers? Share how your center solicits voice of customer? How do you keep them apprised of business developments, advancements, and new products or services? (5%)

We are always in close contact with our Rapid Response Dealer Network. Our dedicated Dealer Support Representatives and Account Executives connect with our Dealers almost daily to check in and provide support. We regularly solicit input on our services, apps, tools, etc... In fact, many of our developments are either a result of a Dealer request or in collaboration with Dealers who serve as beta testers. We keep our Dealers apprised of developments, advancements, new products, and services through those regular check-ins, notifications in our Dealer portal, eblasts, and social media posts.

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## Q13

**ENGAGEMENT WITH INDUSTRY GROUPS** - Identify relevant industry association memberships that you center maintains. How does your company participate in or contribute to these associations? (5%)

We believe that supporting industry groups is critical in supporting the future of our industry as a whole. We provide support through membership, but also by dedicating employee time to participating in key committees, conversations, roles, and initiatives that help better us all. Rapid Response is an active member in many organizations including The Monitoring Association (including a host of committees, and a leader in our organization recently served as TMA President), Electronic Security Association (ESA), Security Industry Association (SIA), Installation Quality (IQ), False Alarm Reduction Association (FARA), Security Industry Alarm Coalition (SIAC), International Association of Chiefs of Police (IACP), National Fire Protection Association (NFPA), Partnership for Priority Verified Alarm Response (PPVAR), and all local station associations.

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## Q14

### ADDITIONAL INFORMATION

Enclosed, please find a customized corporate overview presentation that has been prepared to provide you with a closer look at Rapid Response Monitoring.

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## Q15

Optional: You may upload a PDF or image to accompany your application. (File size limit is 16MB)

**Rapid%20Response%20Corporate%20Overview%20for%20TMA.pdf (11.3MB)**

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