



The CRA Doctor

TOP 5 PRESCRIPTIONS FOR CRA SUCCESS, IN ANY MARKET



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TODAY'S SPEAKERS



Chad Lafon - Securitec
VP, Sales & Business Dev.



Kevin Bachman – The CRA Doctor
Owner & All Around Good Guy



Dave Jeffries - Securitec
Marketing Officer



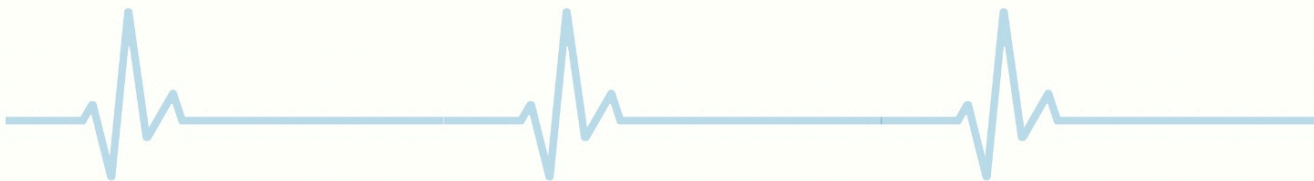
Danielle Hartberger – Securitec
Account Management



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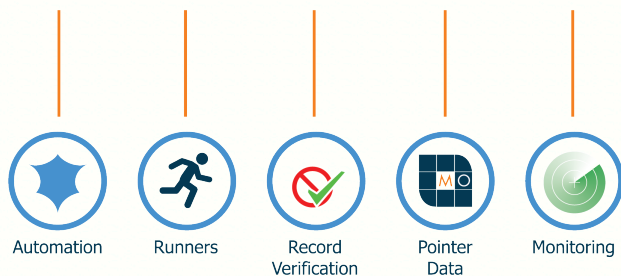
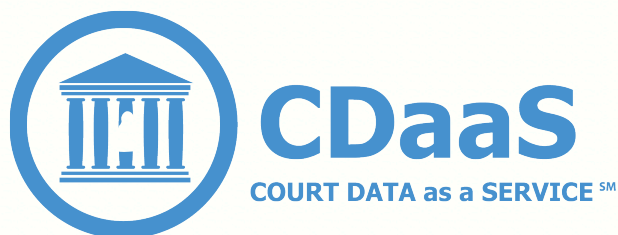
TODAY'S AGENDA

- **Do Your Account Reviews!**
- **Change: The Only Thing You Can Count On**
- **(Re)consider How You Spend Your Time**
- **Don't "Yes" Yourself Into A Corner**
- **Evaluate Your Costs (And Your Prices!)**
- **Bonus Prescription: Stick Around And Find Out!**



SECURITEC INTRODUCTION - CHAD LAFON

VICE PRESIDENT SALES & BUSINESS DEVELOPMENT



ACCURACY. EFFICIENCY. COST SAVINGS

Service Levels



"Exponentially improved our quality."

"Best results we have seen in a very long time."

"...the data only service has created a great deal of workload efficiency within our team and the quality of the work returned has the team very confident in the results."



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CRA DOCTOR INTRODUCTION - KEVIN BACHMAN **PRINCIPAL**



- **Providing multi-discipline solutions to CRA's, Vendors, Employers**
 - Strategic decision making and business review
 - Tactical process improvements
 - 360 degree view of marketplace
- **PBSA Service since 2003**
 - Accreditation (BSCC)
 - Industry Practices Steering Committee
 - Litigation Avoidance: Inaugural Co-Chair w/ Pam Devata
- **HOST of Background Check Radio – An Upcoming Podcast Series**



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KEVIN BACHMAN OVERVIEW: CRA EXPERTISE



- Helped grow a single room CRA into a larger, well respected shop acquired by Sterling
- Served in multiple leadership roles, building, scaling processes and departments
- NAPBS Accredited in 2010
 - We didn't need to be fastest
 - We didn't need to be the cheapest
 - We needed to make the best decisions to best serve clients
- Everyone builds their empire differently. How do you want to build yours?



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POLL QUESTION:

- WHERE DO YOU SEE THE MOST OPPORTUNITY IN YOUR BUSINESS?
 - COMPLIANCE
 - OPERATIONS
 - CLIENT SUPPORT
 - SALES



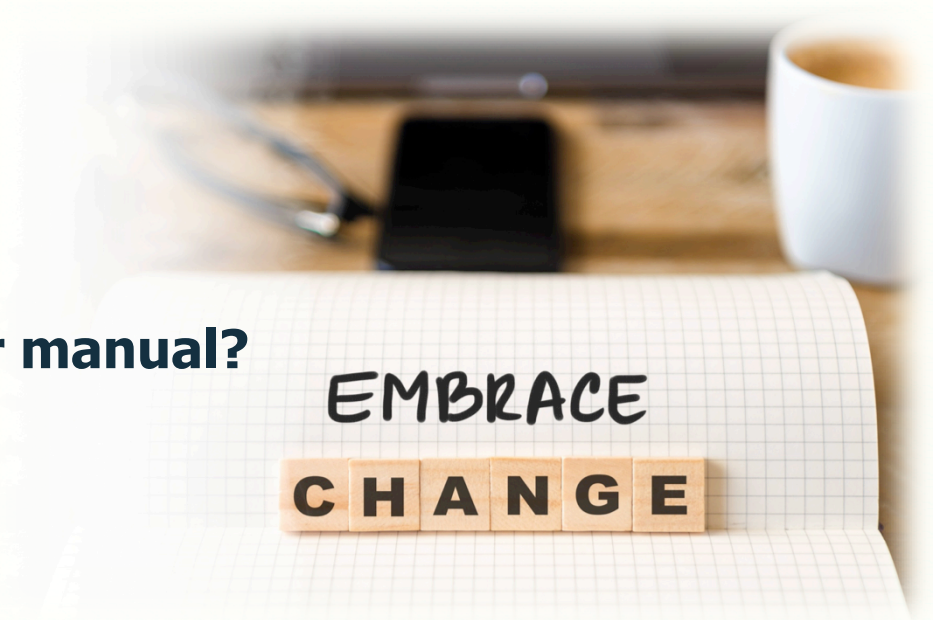
DO YOUR ACCOUNT REVIEWS!

- Clients do the 3 R's
 - Review, Refresh, Reduce
- Who calls first?
- Self serving or servant leader?
 - Chief Revenue Officers or Account Managers?
- Stories and Performances
- Talent Show, not a Quiz Show



PLAN FOR THE ONLY THING YOU CAN COUNT ON: **CHANGE!**

- Will you be +10% or -10%
- Recruiting Process?
- Onboarding and Training?
- Vendor Process: automate or manual?
- Transition Timelines?
- Client Disclosures?



(RE) CONSIDER HOW YOU SPEND YOUR TIME

- **Do or lead?**
- **Someone else or only you?**
 - **Records review and the FCRA**
- **Why are you just sitting there?**
- **In-house or outsource?**
 - **Ex. Federals: great opportunity, great hardship**
- **Investment or Expense?**



POLL QUESTION:

HOW MUCH DO YOU EXPECT THIS INDUSTRY TO CHANGE?

- **A LOT** (FOR THE GOOD)
- **A LITTLE** (FOR THE GOOD)
- **NOT MUCH**
- **A LITTLE** (FOR THE WORSE)
- **A LOT** (FOR THE WORSE)



DON'T "YES" YOURSELVES INTO A CORNER

- Clients won't leave if you suggest alternates
- Weak sales pipelines ----→ more compliance risk
- Times change: industry coalescence around processes
- Opinions change: practices to best manage risk
- People leave: clients may not want the same things



EVALUATE YOUR COSTS (AND YOUR PRICES)

- How will you win?
 - (Hint #1) It's probably won't be b/c of your vendors
 - (Hint #2) It's probably won't be b/c of your platform
- Don't beat up vendors, but stay competitive
- White glove isn't valued if it's free
 - Premium processes and support command premium \$\$



BONUS TIP: **DON'T BE AFRAID TO CHARGE MONEY FOR THINGS!**

- It takes a lot for clients to leave
- Pilot program increases are good
- Raise price until you lose more bids
 - Test and measure, test and measure
- Always ask new clients what they paid before
- When in doubt, just remember...
 - **YOUR COMPETITORS DO!**



WHAT'S OUR VALUE PROP AGAIN?

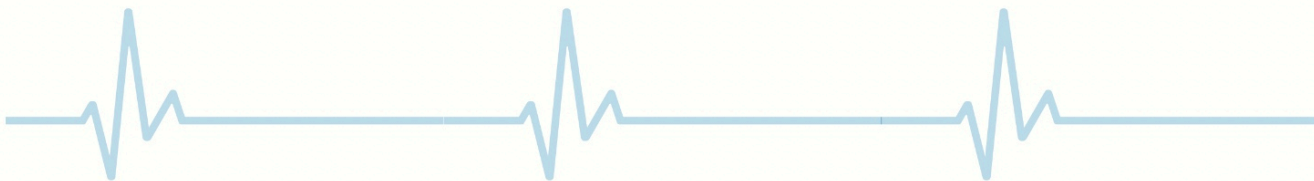
- Is it to be fast?
- Is it to be cheap?
- Is it to be good?
- Is it to help your client make more money?!?!?



WHAT'D WE COVER TODAY?

- Account Reviews are valuable, even if it interferes w/ the DTD
- Tackling in the moment can be a disaster. Plan for change, good or bad
- How you spend your time is as important as how you spend your money
- Saying "Yes" comes with a cost. Know what the bill will be
- Stay current on your fulfillment costs
- Your competitors charge for things. Don't be scared

**IN CASE YOU
MISSED IT**



QUESTION & ANSWER SESSION



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CDaaS

COURT DATA as a SERVICE SM



Automation



Runners



Record
Verification



Pointer
Data



Monitoring



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