



CASE STUDY

PROFESSIONAL ACCREDITATION BODY

Unifying payment and compliance



Overview

This case study demonstrates how a major International Professional Accreditation Body, which sets standards and regulates professionals in the property and construction sector, transformed its revenue collection and communication processes by unifying payment channels and gaining holistic reporting control.

This organization is headquartered in London with its main contact center in Birmingham. It serves two primary functions: providing accreditation, training, and guidance to its members, and offering dispute resolution services to the public. Interactions are highly sensitive, requiring secure payment processing and compliance when discussing member fees or public disputes.

Challenges

The Professional Accreditation Body faced a primary challenge in efficiently and compliantly collecting membership fees:

- **Siloed Communications:** Communications for membership fees (specifically text message reminders) were managed in an external platform. This fragmented approach prevented the organization from having holistic reporting on member engagement across all contact channels.
- **Inefficient Outreach:** The method used to contact members with overdue fees was time-consuming and inefficient, limiting the total number of members who could be reached during critical renewal windows.
- **Secure Payment Complexity:** Agents needed a reliable and compliant way to accept payments over the phone, requiring a robust, integrated PCI solution.

AT A GLANCE

High-speed dialing boosts revenue and compliance control.

✓ ACCELERATED REVENUE COLLECTION

The dialer dramatically increased the daily capacity for contacting members with overdue fees, improving cash flow.

✓ SECURE PAYMENTS

Implemented custom flows utilizing IVR and a PCI solution to allow members to pay fees securely, either automated or agent-assisted.

✓ UNIFIED REPORTING & COMPLIANCE

Consolidated all member communication channels, including text messaging for reminders, to deliver holistic reporting and ensure compliance across all outreach efforts.

Solutions

We implemented a solution focused on integrating high-efficiency collection tools and centralizing all related data:

- **High-Volume Collections:** We introduced the Power and Preview Dialer capabilities. This allowed agents to efficiently contact members regarding their overdue membership fees, dramatically increasing outreach capacity.
- **Compliant Automated Payments (IVR):** We implemented custom IVR call flows that securely routed members to an integrated and compliant PCI solution. This allowed members to pay their fees directly via the IVR without agent intervention, or to be transferred securely to an agent for compliant assisted payment.
- **Centralized Reporting for Text Messages:** The previously external function of sending text message reminders for fees was brought directly into the platform. This centralized all member communications, providing the organization with holistic reporting on payment communications.

Results

The integration of advanced communication and payment tools delivered immediate, measurable impact on revenue and operational transparency:

- **Record-Breaking Outreach:** The deployment of the dialer enabled the organization to contact more members in a single day than they had ever achieved before, directly accelerating membership fee collection.
- **Enhanced Payment Compliance:** The integration of the IVR with the dedicated PCI solution ensured that both automated and agent-assisted payments were handled in a secure and compliant manner.
- **Holistic Communication View:** By bringing text message capabilities in-house, the organization now has centralized, unified reporting on all member communication efforts, enabling data-driven optimization of future campaigns.