

Frequently Asked Questions



We're excited that Credit Risk Management will be rebranding to UPLLevel this spring. Be ready for our fresh new look coming in June. We've prepared this document to help answer questions you might have about our rebranding.

Question 1: Why would you change your name? You have so much history and a great reputation. Why would you want to change that?

Our legal name hasn't changed and the company is still the same great company. For over 47 years, we've been in business now – same family ownership. When we first started out, we were known as The Credit Bureau of Stratford – and over the years we saw a bigger vision for ourselves and changed our name to Credit Risk Management. Now, 20 years later we see an even bigger vision and we're rebranding to UPLLevel to embrace our new services and our North American presence. Just like The Credit Bureau of Stratford was great for one chapter, it was a bit limiting when we reached out across Canada. And now that we're international, CRM Canada was a bit limiting as well. Many of our clients have expanded our partnerships to include collections AND other services as well so we wanted to honor ALL our services. It's just a reflection of some great growth. Many of our clients don't know that we have 3 locations, over 130 staff and serve North America now so this is a way to celebrate our vision for the next 20 or 30 years.

Question 2: Does this growth mean you won't be focused on our regional or local business? Will you be too big to serve us? Will you lose focus on collections?

Not at all. Many of our clients have been with us for more than 4 decades – some from the very start. We have a dedicated team called the Roots Team that strictly services clients who have helped us build this company. We will ALWAYS treasure and protect those relationships and in fact, we're creating some new webinars and ways to share our knowledge with you through an online community as our way of staying super connected and adding value for you. Our Roots Team that serves you has our greatest average staff tenure across the whole company – the average length of service in our head office is over 8 years! That's unheard of in our industry and our clients get the benefit of all that experience.

Question 3: Do we need to change our contract with you since your name is changing?

Not at all – our legal name and corporate structure is staying exactly the same. Nothing needs to change – just refreshing our brand and outlook for the future. If you are unsure about anything, we'd love to arrange a call with Corrie or Tracey to answer any questions you have – let's set that up. All contracts are solid and don't need any amendments so no extra effort for our clients.

Question 4: What about our other national services like PPSA and Credit Investigations? Any changes for those clients across Canada?

The only change will be the way we answer the phones and the look of our website. All clients will be notified ahead of time of course like the rest of our clients, and the contracts won't change because the legal name of the company isn't changing. They will benefit from a fresh new look and feel when they see the company identity – and they'll still have the same great service they've come to know and trust.

Question 5: Does this rebranding signal any other changes at Credit Risk Management?

Nothing structural or ownership-based at all and nothing about our great strong future plans and vision. Coincidentally, one of our three office locations is moving about a block away in June as well – we found a really funky building for sale and we’ve done some renovations to make it perfect for us so we’re going back to owning our building instead of leasing as we’ve done in the past 9 years. We’re actually on the same street - just down about a block and a half – we’ll send out notices about that in June but our actual mailing address is a PO Box and it’s been the same since 1970 so no change there.

Question 6: What does UPLevel mean? Why that name and logo?

UPLevel is a ‘newish’ word that means – “inspired action creating greater capabilities.” We love that definition and we love the positivity, the possibilities, and the fresh ideas that come with the name. We also think it is an extension of our Mission Statement, in particular “to shape and lead our industry by inspiring new standards.” The logo includes some colorful chatboxes that denote a conversation is happening. Our tagline has been “one conversation at a time” for a while now and that stays the same – we’re all about building relationships through effective conversations so we wanted to highlight that. We WILL uplevel your business as your partner – meaning we’ll help you improve it – create greater capabilities – as your partner. It sounds really positive and that’s how we like to live and do business. Do you like it?



Question 7: Do you think it will compromise your 'clout' to collect money for your debt recover divisions? It sounds so friendly; will it water down your strength (and results)?

We've done a lot of research on this and we would never do anything to compromise our results for our clients. The way we've always done business is to treat people better than they expected and motivate them in a positive way so we could always protect your brand while we maximize recoveries for you. Our performance and track record tells us this works very, very effectively. The name we use will just be the introduction – all of our skills and experience and tools and technology will continue to be the reason we're effective. Our people are amazing at what they do and our training and support is described by our clients as unmatched in the industry – that's the real key.

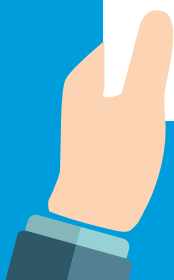
We've also watched closely as others in similar industries have changed their brand and we've watched their performance on national client scorecards where we all compete against each other and we can watch each other's results – and we've noted no negative impact to their results when their name changed to something less 'collection related'. In fact, all feedback tells us that we're likely to get a better connection rate with the new name as it doesn't sound so foreboding. Recently the legislative bodies have frowned upon names that, when left on an answering machine, would tell a listener that there is a collection problem – in case the message was retrieved by another and breached privacy. We truly believe that this rebrand will not be negative in any way AND we'll be watching the trending very carefully.

Question 8: When will the change take place?

On Monday June 12th, we'll start answering the phones and introducing ourselves as UPLLevel. Our invoices and letterhead going forward will have a new name at the top – but the corporate legal name stays the same. We'll be getting ready internally for the change and it may take a bit of getting used to as we've been CRM all these years – but we've done this once before when we shifted from Credit Bureau of Stratford and it all worked out very smoothly. You can call in and test us out on June 12th!

*Here's the definition of the word
UpLevel that inspires our next chapter...*

*UpLevel: (verb) Inspired strategic action
creating greater capabilities.*



Question 9: Will your email addresses be changing?

Our goal remains to make life easy for you – you can continue to use the existing crmcanada.com email accounts for as long as you wish. They will never be obsolete- they will be redirected to a new email address with the domain uplevel.global in it – and that’s what will appear in a return email – but the bottom line is YOU don’t have to change a thing – the existing emails will work forever.

Question 10: Is there any change to how I submit my questions or accounts? What if my forms still say CRM, is that okay?

Since our legal name isn’t changing, the same forms will work just as well as before or we can send you the new forms with the new logos, etc. if you love the look. Whatever’s easiest for you. There are a number of ways to submit accounts for collection – we want it to be the simplest and most efficient for you. Most of our clients find it easiest to submit accounts electronically now and we’re happy to help with that as well. You can send us an excel file that originates from your accounting system – for example all accounts aged 60+ days, or 90+ days – just encrypt it and send it over and we’ll do the rest – we can walk you through any part of that if you like – or you can upload accounts through our website or you can fax in the accounts on forms. If you are already submitting accounts electronically there’s no change to how you do it now.

Question 11: What other new products are you expanding to provide?

UPLevel services will fall into three focused categories: Customer Care, Financial Care, and Business Process Outsourcing. Over the years, our clients realized if we could motivate people to pay a seriously past due account with zero complaints, we could likely motivate them to do anything. So over time we’ve been asked to take on additional customer support. As a result, we now manage customer experience in a lot of different industries – retail and ecommerce, first party calling programs, credit investigations, application processing, and we’re expanding to other outsourced business processes too including outsourced marketing campaigns. Reservation support is something we’re discussing as well. When you’re good at having purposeful, effective conversations and you’re agile with technology, the future is bright for good, hardworking people who want to be brand ambassadors even in tough situations. The sky is the limit.



We are very excited about this transformation and we hope you are too. If you have any questions or want to learn more about our rebranding, please feel free to reach out at:



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