

## CSS—Customer Service Specialist - 2007

### ETA CATEGORIES LIST—CSS

(The following list indicates the major categories of knowledge and skills which should be included in training courses or study in order to prepare for the CSS Certification examination.)

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|---|--|
| <b>1.0 Objectives of World Class Service</b>                            | <b>17.0 Teams and Teamwork</b>                       |
| <b>2.0 Product/Service - Business and Consumer Relationships</b>        | <b>18.0 Pride and Company Loyalty</b>                |
| <b>3.0 Pro-Profit Employees</b>   | <b>19.0 Resolving Customer-Coworker Problems</b>     |
| <b>4.0 Business Leadership</b>  | <b>20.0 Customer Service Quality and Techniques</b>  |
| <b>5.0 A Worker's Legal Responsibilities</b>                            | <b>21.0 Association Membership and Certification</b> |
| <b>6.0 Techno-literacy and the Successful Employee</b>                  | <b>22.0 Listening and Activating a Listener</b>      |
| <b>7.0 Employment Rules - Building Trust</b>                            | <b>23.0 Encouraging Customer Feedback</b>            |
| <b>8.0 Communications</b>   |  |
| <b>9.0 Phone, Fax and Email Etiquette</b>                               |  |
| <b>10.0 Interpersonal Relationships - Dealing with Difficult People</b> |  |
| <b>11.0 Emotions/Stress/Change Management</b>                           |  |
| <b>12.0 Safety/Environment/Health</b>                                   |  |
| <b>13.0 Independent Contract Status</b>                                 |  |
| <b>14.0 Record Keeping - Documentation</b>                              |  |
| <b>15.0 Employee Job Description/ Career Plans/ Evaluation</b>          |  |
| <b>16.0 Professionalism and Ethics</b>                                  |  |

The above listing of major CATEGORIES of study and training are those in which the Customer Service Specialist should be trained.

Where technical curricula contains these 'soft skills', the course should do one of two things:

1. Separate the CSS training. Extract it from technical courses. Offer discrete CSS training and require that all those taking one or more technical courses add this to their schooling.
2. If there is no way to extract the personal skills, character, initiative type subject matter out of technical courses, then segment the tech course so that a clearly defined number of days' and hours' training is established, and the above 23 major categories of CSS training are included in it.

# CSS—Customer Service Specialist - 2007—ETA

## ITEMS LIST

(The following syllabus displays the individual items of knowledge and skills, which should be included in training courses or study in order to prepare for the CSS Certification examination.)

### 1.0 Objectives of World Class Service

- 1.1 Upgrading education
- 1.2 Upgrading information to customers
- 1.3 Examples of excellent service, delivery and communications
- 1.4 Examples of poor service, delivery and communications
- 1.5 Sales support by service department
- 1.6 Keeping up-to-date on product
- 1.7 Relating to customer views
- 1.8 Problems of worker unavailability
- 1.9 Benefits of worker availability
- 1.10 Why customers choose a business
- 1.11 Why customers chose *your* business
- 1.12 Customer turn-off reasons
- 1.13 Product familiarity

### 2.0 Product/Service - Business and Consumer Relationships

- 2.1 Function of marketing
- 2.2 Value addition of service
- 2.3 Sales-service relationship
- 2.4 Marketing-service relationship
- 2.5 Marketing tools
- 2.6 Sales methods
- 2.7 Voluntary and involuntary sales
- 2.8 Creating market and generating sales
- 2.9 Product and service training
- 2.10 Keeping a satisfied customer
- 2.11 Sales and service follow-up

### 3.0 Pro Profit Employees

- 3.1 Sales support
- 3.2 Accessories sales
- 3.3 Time management
- 3.4 Minimizing waste
- 3.5 Efficiency and decisiveness
- 3.6 Upgrading knowledge
- 3.7 Keeping things simple

### 4.0 Business Leadership

- 4.1 Being success-oriented
- 4.2 Understanding the company's power structure
- 4.3 Traits of a successful customer service specialist
- 4.4 Primary objectives of customer service
- 4.5 Rules for success in customer service

## **5.0 A Worker's Legal Responsibilities**

- 5.1 Company liability
- 5.2 Product liability
- 5.3 Premises liability
- 5.4 Vehicle liability
- 5.5 Documentation to avoid customer non-payment
- 5.6 Claims by customers

## **6.0 Techno-literacy and the Successful Employee**

- 6.1 Keeping up-to-date on products, accessories and service
- 6.2 The necessity of educating customers on products
- 6.3 Explaining and defining your business' acronyms to customers
- 6.4 Speaking at customer's level of comprehension
- 6.5 Intelligent communication with coworkers and non-technical employees

## **7.0 Employment Rules, Building Trust**

- 7.1 Protecting the business and its workers
- 7.2 Deciding whether you can live with "bad" rules
- 7.3 Understanding company policies and procedures and consequences of not following them
- 7.4 Alignment with common business rules

## **8.0 Communications**

- 8.1 Communicating technical terms
- 8.2 Reducing customer tensions
- 8.3 Ways not to solve problems
- 8.4 Personal hygiene -appearance
- 8.5 Handling initial contacts vs. contacts with known customers
- 8.6 Ways to gain customer confidence
- 8.7 Importance of customer updates and relating all types of news on regular basis

## **9.0 Phone, Fax and Email Etiquette**

- 9.1 Security consideration in telephone conversations
- 9.2 Information to collect from a customer having a problem
- 9.3 Preparation before the phone rings
- 9.4 Use of fax cover sheet
- 9.5 Sending faxes
- 9.6 Essential parts of email communication
- 9.7 Importance of proofreading
- 9.8 Cell phone guidelines
- 9.9 Taking telephone messages

## **10.0 Interpersonal Relationships - Dealing with Difficult People**

- 10.1 Effective methods of dealing with conflict
- 10.2 Difficult vs. ill intentioned people
- 10.3 Disadvantages of dating an employee/coworker
- 10.4 Dealing with stress
- 10.5 Workplace violence
- 10.6 Importance of good people skills
- 10.7 Questioning to insure understanding the real customer complaint
- 10.8 When to present a very difficult person to management for handling

## **11.0 Emotions/Stress/Change Management**

- 11.1 Dealing with emotions
- 11.2 Recognizing personality types in yourself and others
- 11.3 Improper emotions in the workplace
- 11.4 Taking emotions out of decision making
- 11.5 How change can affect stress
- 11.6 Reluctance to change
- 11.7 Importance of attitude in change

## **12.0 Safety/Environment/Health**

- 12.1 Typical safety rules
- 12.2 Reasons for company safety rules
- 12.3 Packaging safety
- 12.4 Coworker mutual safety
- 12.5 Environment in shop
- 12.6 Environment in homes and businesses
- 12.7 Vehicle safety
- 12.8 Heights safety
- 12.9 Government rules
- 12.10 Poor habits that affect health

## **13.0 Independent Contractor Status**

- 13.1 Definition
- 13.2 Reasons to contract as an independent contractor
- 13.3 Legal implications
- 13.4 Financial implications
- 13.5 Emotional effect of violating laws and rules

## **14.0 Record Keeping—Documentation**

- 14.1 Good and bad records
- 14.2 Reasons for records
- 14.3 Availability of records
- 14.4 Legal reasons for proper records
- 14.5 Database records

## **15.0 Employee Job Descriptions/ Career Plans/Evaluation**

- 23.1 Why job descriptions are useful for a CSS
- 23.2 Why a career is preferable to a job
- 23.3 Steps in a career path and training plan
- 23.4 Importance of employee evaluation
- 23.5 How attitude affects evaluation
- 23.6 How employee's records of training and accomplishment affect evaluation

## **16.0 Professionalism and Ethics**

- 16.1 Respect for customer
- 16.2 Dependable and undependable people
- 16.3 Value of a leadership position in activities outside work
- 16.4 Dress-code policy
- 16.5 Ethical and unethical customer decisions
- 16.6 Influences that contribute to an ethical code
- 16.7 Influence of an organization on industry standards

## **17.0 Teams and Teamwork**

- 17.1 Benefits of teamwork
- 17.2 Teams in a business environment
- 17.3 Team structure
- 17.4 Team constraints
- 17.5 Steps in problem-solving

## **18.0 Pride and Company Loyalty**

- 18.1 Understanding company mission
- 18.2 Good points about the company
- 18.3 Good points about your job
- 18.4 Pride in the company
- 18.5 Negatives of an employee with no loyalty

## **19.0 Resolving Customer-Coworker Problems**

- 19.1 Good customer/client relations
- 19.2 Good coworker relations
- 19.3 Solving customer service problems
- 19.4 Importance of listening
- 19.5 Dealing with high emotions
- 19.6 Benefits of a sympathetic service person

## **20.0 Customer Service Quality and Techniques**

- 20.1 Doing more than expected
- 20.2 Appearance of serviced product
- 20.3 Traits of successful customer service specialist
- 20.4 Effective handling of irate customers
- 20.5 Importance of double-checking

## **21.0 Association Membership/Participation**

- 19.1 The purposes of Associations
- 19.2 Benefits of belonging to business and professional associations
- 19.3 Benefits of Certification
- 19.4 Local/regional/national association participation
- 19.5 Value to your company

## **22.0 Listening—Activating a Listener**

- 22.1 Listening vs. talking
- 22.2 A listener's filters
- 22.3 Interpreting body language
- 22.4 Effective listening techniques
- 22.5 Replace negative words
- 22.6 Importance of feedback

## **23.0 Encouraging Customer Feedback**

- 23.1 Ways to generate feedback
- 23.2 Recognizing valuable clues
- 23.3 Responding to feedback
- 23.4 Handling negative feedback

The above 23 CATEGORIES of knowledge, skills and training, with their 151 subcategory topics, or ITEMS, contain the ingredients for training courses or for individual study towards attaining the CSS certification from ETA.

# **CSS Competencies– 2006**

ETA International

## **Certified Customer Service Specialist – CSS**

**Electronics – computers – help desk – sales – customer service representatives**

CSS professionals require specialized knowledge of human relations concepts with focused application to customer and coworker interactions in the workplace. A CSS professional is a customer-facing individual who strives to serve others, internal and external to their organization, with the highest level of service. A CSS professional certified in this skill set has the abilities and knowledge to reduce service-related disputes and misunderstandings within the organization they serve. Through study of CSS materials the individual learns how to be a more harmonious and contributing member of a team, learning key skills that improve human relations both on and off the clock. Productivity will improve because less time will be consumed handling recalls, customer problems, litigation, and disputes between fellow employees. Customer Service Specialists who have improved their human relationship skills will gain the reward of an achievement that raises the dignity of themselves and those they serve.

Certified Customer Service Specialists require abilities in human relationships and interactions and should possess a conversational knowledge of technical products or services. Providing the best service demands knowing the products and services offered to meet the consumers' needs and the best way to service those needs while maintaining the operational needs of the business and the integrity of the interaction. Understanding the nature of service-related incidents and provider-liability assists the individual in properly advising customers and fellow workers on preventing and resolving service conflicts effectively and equitably for all parties concerned.

### **1.0 Objectives of World Class Service**

- 1.1 Explain the importance of CSS skills in technical training programs
- 1.2 Describe how formal company customer relations initiatives can be conveyed to customers
- 1.3 Contrast the difference between poor and good communications of CSS principles to employees and customers
- 1.4 Describe an example of poor customer service
- 1.5 Describe an example of excellent customer service
- 1.6 Explain the benefits when the service personnel actively support product sales efforts
- 1.7 Contrast the difference between employees well informed of company products and services and those who are not
- 1.8 Explain how to utilize the consumer perception of the company effectively to improve the service interaction
- 1.9 Describe the detrimental results of worker absenteeism
- 1.10 Contrast absenteeism with maximum on-the-job time
- 1.11 List several reasons better customer service can cause customers to choose a business over other similar businesses
- 1.12 List several reasons better customer service can cause customers to choose your business
- 1.13 List several reasons customers are 'turned off' from doing business with a company
- 1.14 List several ways to keep up-to-date on your company's products and services

### **2.0 Product/Service - Business and Consumer Relationships – Going to Market and Staying There!**

- 2.1 Define the function of marketing in business
- 2.2 Define the value addition of service to sales and marketing efforts
- 2.3 Describe the cycle of marketing, sales, purchase, application and service
- 2.4 Describe the relationships between the sales and service departments of a company
- 2.5 Describe the relationships between the marketing and service departments of a company

- 2.6 List marketing tools used to identify product consumers, product needs and a viable market price
- 2.7 List sales methods used to reach a consumer audience
- 2.8 Describe the difference between voluntary and involuntary sales
- 2.9 Explain the function of service in creating a market and generating sales
- 2.10 Explain the importance of product and service training to sales and service employees
- 2.11 Describe how employees receive company product and service training
- 2.12 Relate the importance of keeping a satisfied customer
- 2.13 Relate the importance of sales or service follow up in a business model

### **3.0 Pro-Profit Employees**

- 3.1 Define the qualities of a pro-profit employee
- 3.2 Describe the importance of good personal hygiene for a pro-profit employee
- 3.3 Explain the importance of a positive attitude for a pro-profit employee
- 3.4 Contrast how a pro-profit and a disgruntled employee influence the success of a company
- 3.5 Explain how work efficiency/productivity affects company profit
- 3.6 Identify how one employee can make a difference in the success or failure of a company
- 3.7 Describe how poor communications and record keeping can negatively affect the company's profit
- 3.8 Define the importance of being a team player for individual, business and CSS success

### **4.0 Business Leadership**

- 4.1 Explain the importance of being success-oriented in becoming a business leader
- 4.2 Describe why it is important to understand the power structure in the company
- 4.3 Describe some of the traits of successful customer service specialists
- 4.4 List the primary objectives of customer service
- 4.5 List three personal rules for success in customer service

### **5.0 A Worker's Legal Responsibilities**

- 5.1 Explain why it is important to the CSS that the company is not violating any laws
- 5.2 Describe how another employee's draining the company's resources can affect you
- 5.3 Explain how a company's not providing sufficient help-desk workers can defraud the customer
- 5.4 Explain how an untrained help-desk worker defrauds the customer
- 5.5 List some CSS actions that might negatively affect the company's success
- 5.6 Describe methods of dealing with customers who do not pay their accounts
- 5.7 Discuss employee actions that could result in a lawsuit for the employer

### **6.0 Techno-literacy and the Successful Employee**

- 6.1 Explain why sales, service and marketing personnel must keep up-to-date on products, accessories, and service
- 6.2 Explain why sales, service and marketing personnel must be able to educate customers on the usage of products
- 6.3 Present examples of acronyms used at your business and discuss how these should be explained or defined for coworkers and customers
- 6.4 Present good and bad examples of speaking above, and at, the customer level of comprehension
- 6.5 Describe an example of communication with a coworker or non-technical employee, using words which they might not understand

### **7.0 Employment Rules, Building Trust**

- 7.1 List five policies of your company that protect the business or its workers
- 7.2 Explain an instance where a rule can be avoided with no harm to the company, employees, or the customer
- 7.3 Explain why it is desirable to leave an employer if the rules cannot be followed
- 7.4 Describe business rules, common to many companies, which should automatically be adhered to
- 7.5 Describe the disadvantage of employment rules that do not apply to everyone equally
- 7.6 Explain some of the benefits of allowing employees to make routine decisions on their own
- 7.7 Explain why a company establishes more rules the longer they are in business

- 7.8 State reasons that an employee should accept the company's rules
- 7.9 List some methods to deal with a company's "bad rules"

## **8.0 Communications**

- 8.1 Present an example of explaining a highly technical subject to a customer, showing how to use comparisons with well-known human topics
- 8.2 Describe a case where a service/sales person can reduce customer tensions caused by a lack of knowledge, price or extent of a service function
- 8.3 List methods that might aggravate or enlarge a customer problem rather than reducing it
- 8.4 Explain the differences or liberties one can take when dealing with known acquaintances as compared to someone you are meeting for the first time
- 8.5 List methods to attempt to gain a customer's confidence
- 8.6 List examples where direct letterhead mail should be used rather than e-mail

## **9.0 Phone, Fax, and Email Etiquette**

- 9.1 List examples of telephone conversations in which security should be a consideration
- 9.2 List the five items you need to obtain from a customer having a problem with your product or service
- 9.3 Describe the importance of being prepared when the telephone is first answered
- 9.4 Explain why a cover sheet is vital when sending a fax transmission
- 9.5 Explain why you should remain at the fax machine until your document completes sending
- 9.6 List the three essential parts of an e-mail communication
- 9.7 Explain the importance of proofreading your e-mail message at least twice before sending
- 9.8 List the guidelines of cell phone usage
- 9.9 Describe proper etiquette in taking and relaying phone calls to other people at your place of business

## **10.0 Interpersonal Relationships – Dealing with Difficult People**

- 10.1 Explain the importance of knowing effective methods of dealing with conflict
- 10.2 Explain possible disadvantages of employee/coworker dating
- 10.3 Discuss some good methods for dealing with stress in the workplace
- 10.4 Describe some different types of workplace violence
- 10.5 Explain why having good people skills is important in the workplace

## **11.0 Emotions/Stress/Change Management**

- 11.1 Describe the four basic personality types
- 11.2 Explain the benefits of understanding your personality type and the types of the people you encounter
- 11.3 Discuss some disadvantages of displaying improper emotions at work
- 11.4 Explain a good method for taking the emotions out of decision making
- 11.5 Explain how a person's attitude toward change can increase or decrease stress
- 11.6 List some different types of resistance to change that you might encounter
- 11.7 Discuss the importance of a person's attitude
- 11.8 List some tips that will help a person deal with change

## **12.0 Safety/Environment/Health**

- 12.1 Discuss the relationship of human error and on-the-job accidents
- 12.2 List the importance of caution when climbing and heavy lifting are required on the job
- 12.3 Discuss the basics of safely packaging shipping items
- 12.4 Explain the importance of safety in the use of equipment and on-customer premises
- 12.5 Describe what the CSS must know about electrical safety
- 12.6 List several normal safety rules for employees
- 12.7 Explain reasons for some safety rules that at first may not seem reasonable
- 12.8 Describe environmental conditions that might present safety hazards under certain circumstances
- 12.9 Describe vehicle, company or in-home situations in which special care must be exercised by service personnel

- 12.10 List local, state, or federal rules meant to prevent accidents
- 12.11 List the effects of improper habits such as poor posture, eating/drinking at work, lack of exercise, smoking, etc.

### **13.0 Independent Contract Status**

- 13.1 Explain the difference between Independent Contractor and employee status
- 13.2 List reasons to contract as an Independent Contractor
- 13.3 List reasons a company might be at risk by incorrectly classifying an independent contractor
- 13.4 Describe the benefits to a company by hiring an independent contractor instead of an employee
- 13.5 Describe the disadvantages to the worker of being classified as an independent contractor

### **14.0 Record Keeping - Documentation**

- 14.1 Describe some areas where record keeping is required by law
- 14.2 List examples of good and bad records
- 14.3 Describe the importance of keeping good records of a customer's trouble call
- 14.4 Explain how proper documentation can benefit a company legally
- 14.5 Describe the benefits of database record keeping
- 14.6 Explain why some databases must have very limited access
- 14.7 Describe methods of records disposal for different types of records

### **15.0 Employee Job Description/Career Plans/Evaluation**

- 15.1 List reasons a job description can benefit a CSS
- 15.2 Describe why a career might be preferable to a job
- 15.3 List the steps included in a career path and a training plan
- 15.4 List items of importance in employee evaluation
- 15.5 Describe how an employee's attitude can affect his/her evaluation
- 15.6 List how an employee's growth in knowledge and skills affects evaluation
- 15.7 Relate how an employee's records of his/her accomplishments and training might affect evaluation

### **16.0 Professionalism and Ethics**

- 16.1 Describe respect for customer (appearance, attitude, fears, choices, style, etc.)
- 16.2 Contrast the difference between undependable people and those you can count on
- 16.3 Explain how a worker's taking a leadership position in an association, union, company, social club, etc. can make him/her more valuable to the company
- 16.4 Describe a basic company dress-code policy
- 16.5 Contrast an ethical customer service decision with an unethical one
- 16.6 List three types of ethics
- 16.7 Discuss various influences that might contribute to an individual's ethical code
- 16.8 Describe how a business leader's ethics affect the ethics of the business
- 16.9 Explain how the ethics of an organization or fraternity might improve industry standards

### **17.0 Teams and Teamwork**

- 17.1 List five benefits of teamwork over an "every man for himself" employee attitude
- 17.2 Describe why teams exist in the business environment
- 17.3 Explain the hierarchical structure of a typical business team
- 17.4 List the three constraints on an organizational team
- 17.5 Describe the logical steps involved in a team's problem solving

### **18.0 Pride and Company Loyalty**

- 18.1 Describe how a worker's failure to understand the mission of his employer could be detrimental
- 18.2 List several factors you consider good about your company, office or products
- 18.3 List the aspects you consider good about your job at the company
- 18.4 List several features that give you pride in your company
- 18.5 Explain the negatives associated with a worker who has no loyalty to his company or its products

## **19.0 Resolving Customer-Coworker Problems**

- 19.1 Discuss the important steps of good customer/client relations
- 19.2 Discuss how a company can promote good coworker relations
- 19.3 List the steps involved in arriving at a solution to a customer service problem
- 19.4 Explain the importance of listening when dealing with a customer
- 19.5 List several reasons a customer or coworker may become highly emotional
- 19.6 Explain ways to respond to highly emotional people to help reduce negative reactions
- 19.7 Contrast the response of an unsympathetic service person to that of sympathetic treatment of an emotional person

## **20.0 Customer Service Quality and Techniques**

- 20.1 Explain what is meant by a customer service person doing more than expected
- 20.2 List some examples of how completed service products' appearance can show quality
- 20.2 Describe some of the traits of successful customer service specialists
- 20.3 List three personal rules for success in customer service
- 20.4 List some effective methods of handling irate customers
- 20.5 Present an example of double-checking which could save a recall service event or head off a customer problem

## **21.0 Association Membership and Certification**

- 21.1 Explain the advantages of Business League Associations for businesses and professional associations of individuals
- 21.2 List several benefits of each type association
- 21.3 Describe the benefits of technical certifications to the public and industry
- 21.4 Explain the function and thus, benefits, of participation in recognized (local, national, professional or trade) associations to your business or work
- 21.5 Explain the benefits of your own personal association membership to your company

## **22.0 Listening and Activating a Listener**

- 22.1 Explain the detrimental effect of sales and service personnel doing "all of the talking" to a customer
- 22.2 Discuss some of the filters a listener brings to a conversation
- 22.3 List some tips for interpreting body language
- 22.4 Describe techniques for effective listening on the telephone
- 22.5 List some positive replacements for common negative words and comments
- 22.6 Discuss the importance of feedback in listening
- 22.7 List do's and don'ts in becoming an effective speaker

## **23.0 Encouraging Customer Feedback**

- 23.1 Describe why customer feedback is essential to your business
- 23.2 List methods a CSS can use to collect customer feedback
- 23.3 Discuss why it is important for a CSS to be an expert on the company website
- 23.4 Explain the use of surveys to encourage customer feedback
- 23.5 List three parts of a working feedback system

**Suggested Study Material:** *The CSS Examination Study Guide* – Staff and Members of ETA – ISBN 1-891749-04-8 800-288-3824 or [www.etainternational.org](http://www.etainternational.org) 210 pp; 8 ½ x 11"; contains CSS practice quiz - \$30

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