



Kelly Shock, CCRA, CCE

## Reunited

*Reunited, and it feels so good  
Reunited 'cause we understood  
There's one perfect fit  
And, sugar, this one is it  
We (all) are so excited 'cause we're reunited, hey, hey*

Yes, I'm singing the song by Peaches and Herb in my head. It was wonderful to see so many members of our CFDD family at Credit Congress in Grapevine, TX. Overall attendance at the conference reminded me of the good old days—you know, the ones before COVID-19. As you'll recall, our 2020 Credit Congress in Las Vegas was cancelled due to the virus, and pandemic-related travel restrictions greatly reduced the number of attendees in Kansas City and Louisville in 2021 and 2022. The CFDD National Conference in Oklahoma City was delayed by two years, with attendance also down when it was held last fall.

But in 2023, *We're baaack!* And wasn't it grand? Attendance at the CFDD Luncheon in Grapevine almost doubled from the luncheon attendance in Kansas City and approached pre-pandemic numbers. CFDD was once again in the spotlight with the "CFDD at Credit Congress" educational track, featuring nine sessions presented by 15 of your fellow CFDD members, including the popular "Speed Learning" session with books given away at the end. 39 CFDD members attended Credit Congress after being awarded CFDD National Scholarships, which this year included the full registration fee and the CFDD Luncheon. Next year, Credit Congress attendees will be singing Elvis Presley's "Viva Las Vegas." We'll remind you when it's time to apply for a CFDD National Scholarship to attend, so save the date (June 9-12, 2024)!

At the CFDD National Conference last September, Alaina Worden, CCE, presented "Building Relationships with Your Customers." One of her slides contained this statement: "Family, friends, colleagues, acquaintances, customers and strangers—we are created for relationships. It is literally built in our DNA! Building connections in all areas of life is vital to our overall mental health, happiness and the sense of belonging." Immediately, Michael Franti's song "People Need People" popped into my head (songs are always playing in my mind, no ear buds necessary).

*People.* People are what make the CFDD organization so special. We gain knowledge through educational presentations, classes and seminars given by people. We network with other CFDD members—people and we are mentored by and mentor others—people. I'm sure it's as true for you as it has been for me, that

## DATES TO REMEMBER

2nd Quarter 2023  
Membership Reports Due by  
**July 10**

Chapter Board of  
Directors Rosters Due by  
**July 10**

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people throughout our careers are an integral part of the foundation upon which we have built our careers in the credit profession.

I am honored to serve the CFDD organization and its members as National Chair in 2023-2024. I have chosen “People Need People” as my motto for the year, with an emphasis on networking and mentoring. Both are strengths for which CFDD is well known; strengths that are part of the foundation for your success as a credit professional.

I challenge every CFDD member to make this the year that you foster relationships with other CFDD members and build your network. Networking is defined as “the action or process of interacting with others to exchange information and develop professional or social contacts.” Yes, it takes effort and sometimes requires stepping outside of your comfort zone, but you and the people you build relationships with will benefit from the effort. Become actively involved with your Chapter by serving on committees or on its Board; you will grow from the experience, get to know other members better and your Chapter will benefit from your efforts. Participate in one of your local NACM Affiliate’s industry credit groups, build your network with credit professionals within your industry (and invite them to attend a CFDD meeting with you). Add to your network with people from other CFDD Chapters by attending their Chapters’ virtual meetings. And don’t hesitate to add a speaker or two to your network as well.

*Mentoring.* The Oxford dictionary defines mentor as “an experienced and trusted advisor.” How do you find mentors? Think of people around you: do you have a role model, or perhaps a “subject matter expert” in your company or industry? Ask them if they will be your mentor. Mentoring doesn’t have to be formal or time consuming. Make a connection with people you can speak with about what’s going on, can answer questions and provide guidance. You will want several mentors, both inside CFDD and out (and for those not already CFDD members, invite them to a meeting). It will probably fall on you to keep the mentorship going, so even if you don’t have something to ask about ... pick up the phone now and then and give them a call. Also, embrace the opportunities when you can mentor others, it feels good. The more you give, the more you get back.

As CFDD helps you build your network, remember that PEOPLE NEED PEOPLE.

Lyric excerpt from “People Need People” by Michael Franti:

*We are all on the same road  
Walking different directions  
Through the reach of a hand or a smile for a while  
You can feel the connection  
Even in the times when you think you’re all alone, don’t  
‘Cause people need, people need, people need people  
We’re all righteous and humble, we climb and we stumble  
The strong and the feeble  
No matter where in the world that you go  
Don’t you know that people need people?*



*Kelly Shock, CCRA, CCE, serves as the National CFDD Chair. She is a proud member of the CFDD Oklahoma Chapter and is a Credit Analyst for Continental Resources, Inc. in Oklahoma City, OK.*

## CFDD's Culture of Recognition

The 2023 awards presentation at CFDD's Annual Business Meeting & Installation Luncheon reaffirmed its long-standing culture of recognition. As it does each year, both Chapters and individual members were honored and recognized, cheered on by a crowd of more than 100 members and guests at NACM's 127th Credit Congress & Exposition.

For the purposes of the awards program, CFDD Chapters are divided into two classes: Class A Chapters have 25 or more members and Class B Chapters have 24 members or less.

CFDD's **Class A** Chapters are Portland, Charlotte, Phoenix, Louisville, Minneapolis/St. Paul and Seattle. **Class B** Chapters include Raleigh/Durham, Tacoma, Wichita, Oklahoma, Kansas City, Omaha/Lincoln and Albuquerque.

CFDD Chapters invest a great deal of energy to create monthly educational programs. At least once a year, a program exceeds everyone's expectations with great attendance, spirits running high and a buzz created by the program content. Annually, CFDD Chapters are invited to nominate one of their regular monthly programs for our National Outstanding Regular Program Award.

The Class B **National Outstanding Regular Program Award** was bestowed upon our **Wichita Chapter** for its Outstanding Regular Lunch & Learn Program. The program, led by local economist Jeremy Hill, provided participants with an economic update.

In Class A, **CFDD's Portland Chapter** was honored with the **National Outstanding Regular Program Award**. The program, *Effective Leadership: It's Not Just Positional, It's Personal*, looked at how leaders persuade and influence others through high-impact communication, stressing that you don't need a title to be a leader.



Greg Hanlon accepts the Outstanding Regular Program Award on behalf of CFDD's Wichita Chapter



Alaina Worden, CCE, accepts the Outstanding Regular Program Award on behalf of CFDD's Portland Chapter

CFDD's **Wichita Chapter** was honored with a **National Special Program Award** in recognition of its 2022 Super Session! They held a partial-day seminar with three speakers for a mini-conference in Wichita that included a group lunch. Attorney Wanda Borges spoke on Subchapter V of the Bankruptcy Code, Nancy Watson-Pistole, CCE, ICCE, spoke on positive language in communications and Attorney Jason Torf presented on the topic of credit processes and lawsuits.



Lisa Burns, CBF, CICP, and Greg Hanlon accept the National Special Program Award on behalf of CFDD's Wichita Chapter

CFDD's Chapters are invited to nominate one of their outstanding publicity efforts or a campaign for the **Annual Outstanding Chapter Publicity Award**.

In Class A, **CFDD Portland** was recognized with the **Outstanding Publicity Award**. The Portland Chapter's *Credit Line* newsletter informs the membership of Chapter activities, educational programs, scholarship opportunities and member achievements. The Portland Chapter reaches beyond its membership by publicizing its programs to other CFDD Chapters. The Portland Chapter's publicity efforts have led to increased member participation and engagement.

In Class B, **CFDD Wichita** was recognized as this year's **National Publicity Award** recipient. Our Wichita Chapter surpassed its goal for 2022: they implemented a hybrid approach to monthly meetings, and held their Super Session. They began to recognize membership milestones and took more photos at their regular meetings. They have succeeded in getting more members to write articles for their newsletters and they provide consistent communication via their website, Facebook page and newsletter.



Alaina Worden, CCE, accepts the Class A Outstanding Publicity Award on behalf of CFDD's Portland Chapter



Cindy Overeem accepts the Class B Outstanding Publicity Award on behalf of CFDD's Wichita Chapter

Each year, a **Membership Award** is presented to the Chapter in each class having the largest percentage net gain in its Chapter membership during the year. The membership total shown on the Quarterly Report as of December 31 is the base figure used for these awards.

In Class B, CFDD's **Oklahoma Chapter** was recognized for its gain of 12 members, a 71% increase!

In Class A, CFDD's **Charlotte Chapter** won the national membership award for its gain of two members, recording a 6% increase.

Other Chapters that either grew their membership or held membership steady in 2022 were:

- Louisville for gaining one member
- Minneapolis/St. Paul for holding membership steady
- Omaha/Lincoln for holding membership steady
- Raleigh/Durham for gaining one member
- Seattle for holding membership steady
- and, Wichita for gaining one member



Tina Henson accepts the 2022 Class B Membership Award on behalf of CFDD's Oklahoma Chapter

Established in 2003, the **National Mentor Award** recognizes an individual for their participation in and promotion of the credit profession and CFDD through mentoring. Any member in good standing may nominate a candidate for the CFDD National Mentor Award.

This year's honoree was nominated by a group of members, who say she selflessly gives of her time and energy and that she is always available to lend guidance and suggestions on how to best manage a situation. No matter what is happening in her personal life, she comes in with a smile and brightens the room with her positive energy.

Another said that throughout their entire credit career, they've had the tremendous pleasure of receiving an unparalleled and unsurpassed level of mentorship from our honoree. They said that she is a consummate mentor, first and foremost, leading by example. Her knowledge and tenure in the credit profession are well respected and admired. She is always professional, willing to share her time and knowledge, and proudly represents the credit profession in every aspect of her career, which significantly contributed to my desire to reach out for her guidance and leadership skills as a mentor.

We know our future leaders will always appreciate her kind words of encouragement, her professionalism and her genuine care and concern of others. She instills in all of us the responsibility we must have to carry on the tradition of our organization. She brings value and commitment in a time when that is a rare commodity. The community celebrated the incredible attributes of **Mary Moore, CBA**, CFDD's National Mentor.

The **Distinguished Member Achievement Award** was established in 1988 to recognize outstanding individual achievement. Eligibility requires the nominee to have held membership for at least five years, have held at least two offices, served as Chair of at least two committees and is supported by a Chapter Letter of recommendation. Each Chapter is invited to nominate one candidate each year and one individual for each class can be honored.

This year, CFDD celebrated two DMA Award recipients.

The first DMA honoree is described by her Chapter as a success story: she joined her Chapter about nine years ago and right away became an integral part of it. She has served in many roles on her Chapter's Board and now also serves on the CFDD National Board.

As a Chapter leader, she not only led but was key in its successful growth over the last three years. She volunteered to steer the ship and kept her Chapter going strong by finding a way for it to meet virtually and stay connected throughout the challenges of COVID: It took commitment and innovative thinking.

She has given back by leading presentations or by moderating round tables as she probes topics by asking leading questions so that everyone in the room learns something positive.



Mary Moore, CBA, celebrated as CFDD's National Mentor

Her belief in education is apparent from her certifications, but she also inspired two of her team members to achieve their CBA designations. **Stephanie Moore, CCE, CICP**, was honored with CFDD’s National **Distinguished Member Achievement Award**.

This year’s second award recipient has consistently demonstrated her willingness to lead, mentor and teach: She selflessly and generously lives by the mantra of “pay it forward” and she constantly promotes the credit and finance profession through many facets of her professional and personal life.

She is a true servant leader, having served on her local Chapter’s Board and on the CFDD National Board.

She is a tenured and respected leader in the credit and finance community, having earned her CCE and ICCE designations, which confirm her dedication to professional excellence and growth. She epitomizes, defines and leads by example to promote the credit profession. CFDD honored **Ellen Wodiuk, CCE, ICCE**, with its **Distinguished Member Achievement Award**.

A few years ago, our Chapter leaders and the CFDD Board of Directors spent time discussing whether our National Awards were all encompassing.

The CFDD Executive Committee continued to discuss this topic for several months, leading to the creation of a new award that was introduced in 2019, the **CFDD Star Award**. The Executive Committee felt compelled to recognize exceptional actions or accomplishments from an individual, emerging leader, or local Chapter that exemplify an outstanding level of achievement to our organization.

No application process exists. This recognition is based on a nomination and vote of acceptance from the CFDD Executive Committee. Awards may or may not be given each year.

Special recognition was given for an exceptional and consistent level of persistence to rebuild chapter membership, reinvigorate its educational offerings and the launch of a newsletter. CFDD proudly recognized its **Phoenix Chapter** with a **Star Award**.

CFDD’s rich tradition of recognizing the accomplishments and successes of its Chapters and members continued in 2023 at its annual business meeting. All Chapter Boards should think about potential candidate nominees for next year: it’s never too early to begin planning for nominations.



Stephanie Moore, CCE, CICP, honored with CFDD’s National Distinguished Member Achievement Award



Ellen Wodiuk, CCE, ICCE, honored with CFDD’s Distinguished Member Achievement Award



Sheila Roames, CCE, Taylor Haven and Ellen Wodiuk, CCE, ICCE, accept the Star Award on behalf of CFDD’s Phoenix Chapter



**Commit**

*to Excellence as a  
Credit Professional*



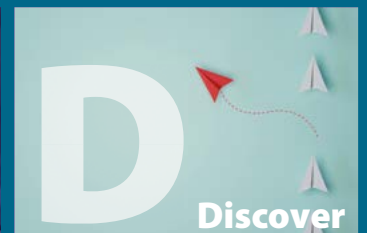
**Focus**

*on Your Personal and  
Professional Growth*



**Dedicate**

*Time to Achieve  
Your Goals*



**Discover**

*Your Leadership  
Potential*

# CFDD AT CREDIT CONGRESS





Chris Birdwell

## Associating Ownership

I feel in some ways, my term as CFDD National Chair just began, when in reality it quickly drew to a close in June. Most members reading this farewell address do not even know me. However, consistent with Ken Blanchard's quote and my theme "None of Us Is as Smart as All of Us," I want you to know that your membership and support, no matter the level of involvement, are cherished and critical to ensuring the long-term success of CFDD.

During my ascension, it was clear the initiatives of previous Executive Committees coupled with the efforts and support of the NACM team of stars created a robust culmination of resources rooted in our vision of learning, coaching, networking and individual enrichments, such as designation achievements, Scholarship awardees and so much more! I find myself perplexed as to why prospective members introduced to the benefits of CFDD do not embrace receiving such enormous professional value at a nominal cost when compared to other memberships.

This bewilderment guided my focus in the direction of how often products and services change their advertising and marketing strategies to promote freshness and top-of-mind awareness.

We have all been in this scenario or something similar: You are standing in line at a convenience or grocery store and your eyes cannot avoid noticing the catchy starbursts of gossip or scandalous photos on the cover of certain magazines. The same is true involving labeling of products with splashy packaging, intriguing ingredients and alluring pictures. The question is whether you are enticed enough to pick it up and associate ownership; this level of marketing is known as "impulse buying." Don't even act as if you have not fallen prey! For instance, I don't know if this is a nationwide problem but I will unabashedly share that my trips to the store often result in items such as peanut M&Ms, Hostess Fruit Pies or some other delicacy mysteriously appearing in our cart, making their way up the conveyor belt and through checkout.

Capitalizing on this premise and aligning with my inference above regarding impulse buying, I am thrilled our Board and NACM are open to brand recognition initiatives in order to improve buy-in and ownership to both seasoned and new generation credit professionals.

For instance, the Board of Directors' unanimous decision, supported by NACM, to relax our scholarship application was a fabulous change towards energizing more attendees for Credit Congress 2023. I was grateful when the Board agreed to move forward and empower members' creativity with the creation of a catchy/spirited CFDD tagline, intended to modernize and visibly pronounce CFDD values and benefits.

**SHOW OFF YOUR CREDITABILITY WITH YOUR DESIGNATION BADGE.**

It reflects your knowledge, skills, abilities, accomplishments and leadership.

Visit [nacm.org/certification](https://nacm.org/certification) or call the NACM Education Dept. at 410-740-5560 to find out about your next designation.



It has been a privilege to serve as your National Chair. I want to extend my heartfelt gratitude to those who played instrumental roles during my term. To my Vice Chairs, Kelly Shock, CCRA, CCE, and Heidi Lindgren-Boyce, CCE, for their unwavering support and successes with this year's Credit Congress CFDD educational track and speakers, improved awareness of nationwide educational offerings, record setting national newsletter reads and a steady climb in overall membership. I want to thank Sam Bell, who as past National Chair, not only shared words of encouragement, but also implemented his idea by becoming a direct liaison to fellow past National Chairs (PNCs) through exclusive communication. In addition, we cannot forget Brett Hanft, CBA, for his CFDD representation, skilled diplomacy and advocacy building with the NACM Board of Directors.

Finally, for all the behind-the-scenes coordination and facilitation provided by the team at NACM: from our dynamic website, accurate operations and minutes reporting, Congress Luncheon logistics, and priceless branding through the CFDD track of sessions being offered at NACM's Credit Congress. Verve is building and I am inspired with our positive momentum and I am convinced that our extra efforts towards refinements rooted in enhanced branding, inclusiveness, collaboration and shared vision will grow into staples and strengthen as we forge ahead.

*Chris Birdwell is the 2022-23 Immediate Past CFDD National Chair. Chris is a proud member of the CFDD Wichita Chapter and is Credit Strategies Manager at Pioneer Balloon Company in Wichita, Kansas.*



## CFDD Chapter Membership Growth Tip

Prior to 2020, our Chapters had been meeting in person for years. Over time, Chapters meeting within large metropolitan cities lost members due to traffic, parking difficulties and late evenings.

Fast forward to today where most of our CFDD Chapters have permanently migrated to holding their educational programs virtually, either via Zoom or MS Teams.

This means that your Chapter has the opportunity to bring back members who want their education from the comfort of their offices or sofas (bunny slippers included). Take this opportunity to reach out to your lost members and consider strategies to re-engage them in your Chapter's virtual programs.

# NACM'S FALL CERTIFICATE COURSES

## Financial Statement Analysis 1

A requirement for the CBA and CCRA designations

**September 18-22**



## Business Credit Principles

A requirement for the CBA designation

**October 16-20**



## Financial Statement Analysis 2: Credit and Risk Assessment

A requirement for the CCRA designation

**November 6-9**



**PLAN NOW  
FOR THE CLASS  
YOU NEED**

Classes will be held in the relaxed learning environment of NACM National headquarters in Columbia, MD. For more information and to register, visit the Certificate Courses page at [www.nacm.org](http://www.nacm.org) or call 800-955-8815.



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# Chapter Programs



## Credit as a Profit Center

The credit department is often not recognized and appreciated for the value it provides to an organization. Frequently, there is a mutual failure of credit and sales to understand each other and their respective goals and objectives. Discussion about goals include the opportunity to increase corporate revenue, reduce expenses and increase the credit department's value to every company. Learn methods to improve the productivity of your credit/AR department for an increased appreciation of how credit management contributes to your company's bottom line.

*Speaker: Nancy Watson-Pistole, CCE, ICCE, Shawnee, Kansas*

## Sigh of Relief? Or Remain Tense? An Economic Update

In just a couple of months, there has been a major attitude shift among analysts. Inflation seems to have peaked in many areas and there is more talk than ever regarding a soft landing. On the other hand, the labor shortage has provoked wage inflation and that could keep Central Banks in an aggressive mood. What are we looking at right now?

*Speaker: Dr. Chris Kuehl, Armada Corporate Intelligence Services' Chief Economist, Lawrence, Kansas*

## Becoming a Better Leader Through Mental Fitness

As a leader, developing your mental fitness enables you to make sound decisions and maintain focus—essential to achieving peak performance. Staying focused can be the difference between success and failure for you and your team. Mentally fit leaders model resilience, positively influence team culture and foster a collaborative work environment. By prioritizing your mental fitness, you can improve your leadership skills, boost your productivity and enhance your overall well-being. Now more than ever before, leaders are being asked to help their teams manage uncertainty, stress and burnout. It is those who are mentally, physically and emotionally fit who will help their teams the most.

In this interactive session, we will focus on:

- How to develop your mental fitness
- The benefits of mental fitness
- Personal approaches to mental fitness that you employ

*Speaker: Tom Schreiber, President of Schreiber Training & Consulting, Prairie Village, Kansas*



## To Settle or Not to Settle

Sometimes a credit professional encounters a situation where a customer is likely to fail. Should the credit department settle for a partial payment or not? Will that reduce losses? What is the right timing? This will be an opportunity to discuss different credit professionals' perspectives.

*Speaker: Todd Banchor, CCE, Senior Financial Analyst, ConAgra Brands, Inc., Omaha, Nebraska*



## Credit Jeopardy

Based on the popular television show, this CFDD National program is both educational and fun. This interactive program can be used for monthly meetings and for study groups preparing for the NACM designation exams.

*Moderated by Eleanor Hartman, CCE, Credit Manager – North America at Autodesk, Inc., Portland, Oregon*

## Understanding Subchapter V of the Bankruptcy Code: Definitions and Case Study

This session will help you understand the basic premise behind the new Subchapter V of the Bankruptcy Code. Jason will begin the session with a key learning approach to define its purpose and intent, followed by an actual case study that has recently concluded in the bankruptcy court. Jason is excited to share the process by which this new provision was used and how it impacted this bankruptcy case. This is definitely a session you want to attend to hear about the newest addition to the Bankruptcy Code.

*Speaker: Jason M. Torf, Esq., Tucker Ellis LLP, Chicago, Illinois*

## How to E-mail Like a Rock Star and Win Your Case!

Join attorney Karen Hart as she shares best practices for effective business communications for credit managers, with an eye toward minimizing legal risk and helping your company's position and claims in court proceedings.

*Speaker: Karen Hart, Esq., Bell Nunnally & Martin LLP, Dallas, Texas*

## Credit Management in the Metaverse!?!?

Join attorney Karen Hart to learn about cryptocurrency, NFTs and the developing metaverse platforms. Karen will focus on how they came to be, what they are and will be used for, and how they will change the world. Will these technologies and platforms change how you do business, how and whether your company will be paid and how your credit department operates? How will they impact your bottom line? What will be the risks and rewards of adopting these new, big ideas and embracing change in your business? Join this session as Karen answers these burning questions.

*Speaker: Karen Hart, Esq., Bell Nunnally & Martin LLP, Dallas, Texas*

## Credit Enhancements

Various forms of credit enhancements are more important now than ever. These security measures give businesses more assurance of getting paid as invoices are coming due for payment. This session will take a deep dive into the most widely used and successful enhancements including guarantees (personal, corporate and cross corporate), UCCs (Uniform Commercial Code), PMSIs (Purchase Money Security Instruments), letters of credit and more.

*Speaker: Jason M. Torf, Esq., Tucker Ellis LLP, Chicago, Illinois*

## An Introduction to Power Query

This session provides a basic outline of the automation possibilities available in the Power Query function of Excel.

*Speaker: Eleanor Hartman, CCE, Credit Manager – North America at Autodesk, Inc., Portland, Oregon*



PORTLAND

### Change Management: Practical Applications

This session will be a case study in the practical application of change management techniques as they have been used at Autodesk, Inc. during a major software upgrade project.

*Speaker: Jeffrey Snipes, CICP, a Credit Analyst at Autodesk, Inc., Manchester, New Hampshire*

### Six Signs It Is a Scam

Every year, thieves and con artists cheat thousands of Oregonians out of their hard-earned money and valuable personal information. This presentation will help you stop the fraud before it starts and teach you how to alert others so they can avoid becoming victims. Please join us and spread the word to your family, neighbors and friends across the state, to help them become smarter consumers as well.

*Speaker: Ellen M. Klem, Director of Consumer Outreach and Education at the Oregon Department of Justice, Office of the Attorney General, Oregon*



SEATTLE

### Crypto Currency & the Metaverse

This session will discuss cryptocurrency, NFTs and the developing metaverse platforms, examining how they came to be, what they are and will be used for and how they will change the world. Will these technologies and platforms change how you do business, how and whether your company will be paid, and how your credit department operates? How will they impact your bottom line? What will be the risks and rewards of adopting these new, big ideas and embracing change in your business? Join us and venture into the new world!

*Speaker: Karen Hart, Esq., Bell Nunnally & Martin LLP, Dallas, Texas*

### Chapter News



Tacoma-Seattle-Fundraiser



*Monica Schweitzer, CBF accepting President Pin for Service*



RALEIGH/DURHAM

### Hiring Practices in the Current Environment

This session will look at hiring and compensation trends, current marketplace of the finance and accounting industry and diversity, equity, and inclusion in the workplace. The session will conclude with a wrap-up, allowing time for questions.

*Speakers: Martha Heinlein, Vice President & Practice Director at Robert Half and Halie Sosna, Practice Director & Vice President at Robert Half Talent Solutions, Raleigh, North Carolina*

### Cost Reduction for Credit and Data Vendors

In this session, you will have the opportunity to learn about:

- Managing the cost of data subscriptions
- The Kreller Mission for savings
- Kreller's "no risk" compensation structure
- Top five reasons to work with Kreller
- The Kreller Process - A proven plan to Savings
  - Analysis
  - Benchmark agreement
  - Fact Finding and research
  - Presentation of recommendations
  - Implementation
- Questions

*Speaker: Christy M. Temple, Global Account Executive at the Kreller Group*

### The Impacts of Asset Purchase Agreements on Creditors

This session will cover Asset Purchase Agreements, defining what they are, how they can impact potential creditors and whether there is a way to avoid them as a creditor. Other topics will include:

- North Carolina Voidable Transactions Act
  - Background of the Act
  - Definitions in the Act (Affiliate, Asset, Insider, Insolvency, Value)
  - Present and future creditor rights
  - Factors for determining intent of the debtor
  - Further rights of present creditors
  - Timing of the transfer
- Remedies for the creditor under the Act
  - Defenses for the debtor and asset purchaser
  - Statute of limitations on this Act
  - Series organizations
  - Cherry Community Case in North Carolina
  - Other examples from North Carolina case law

*Speaker: Aaron Gavin, Esq., Hannah Sheridan & Cochran, LLP, Raleigh, North Carolina*



WICHITA

### The Enneagram Explained

The Enneagram is a system of nine personality types that are interconnected, yet unique and innate to each person. Knowing your specific type as well as all nine types can strengthen your close personal relationships, your work relationships and even the relationship with yourself. We will cover all nine types, the three subtypes and how to use the *Enneagram* in the workplace. Before the session, each attendee will take the *Enneagram* quiz in advance to know your personal scoring.

*Speaker: Taylor Haven, Litigation Accounts Manager at the Law Offices of Mark A. Kirkorsky, P.C., Smith Center, Kansas*

## Join Team CMI!

Business credit professionals are able to offer perspectives about the economy that no one else can. After all, commercial credit is the lifeblood of all economies as companies rely on credit to purchase everything from raw materials to inventory, equipment and services. Virtually every business transaction that involves another business depends on credit. NACM collects those robust perspectives every month in the form of a survey, called the Credit Managers' Index (CMI).

We know the CMI is an accurate, forward-looking economic index. The CMI detected that the U.S. economy was in a recession in 2008/2009 before the experts officially called the recession. Team CMI needs your support as we wade through a period of economic turbulence. Help us keep a finger on the pulse of the U.S. business economy.

Intentions are not concrete and conjecture weakens the data of other indices. Other surveys cannot compare to the valuable information the CMI has to offer. It's the credit department that is on the front line of the economy at all times. Credit professionals see the first signs of a slowing economy as payments slow, collection claims rise or the number of bankruptcy filings increase.

The CMI can predict economic developments because of the very nature of credit management. Credit professionals look to the future because they are concerned about the condition of their customers 15, 30, 60 and 90 days from now. Credit professionals think ahead, which is why the index is so reliable.

Although many of the questions asked are fairly basic, a closer look reveals that they all suggest something that hasn't yet happened but will in the coming weeks and months. The questions in the survey take advantage of the forward-looking nature of credit management to accurately and intuitively suggest where the economy is headed.

As the leading advocate for B2B credit, NACM not only wants the credit profession to grow, but also wants to bring focus to the critical role it plays.

Every member of the CMI team helps grow the important economic indicator and helps spread the word about business credit. If you're interested in both growing the profession and bringing attention to the role of the credit professional, [join Team CMI](#).

Earn 0.1 roadmap points each month

- Receive email alerts when survey opens
- All responses confidential

SURVEY OPENS	SURVEY CLOSSES
Mon., July 10	Fri., July 14
Mon., August 7	Fri., August 11
Tue., September 5	Fri., September 8



Read more about the CMI [here](#).

## 2 REASONS TO JOIN THE CMI TEAM

**1** Credit professionals see the future and have made the CMI a forward looking, accurate economic indicator.

The CMI brings attention to the credit profession and the important role it plays in the U.S. business economy. **2**

**The CMI Team Needs Your Help.**



The **Mission** of the NACM Credit and Financial Development Division is to develop tomorrow's business leaders through core offerings.



Our **Vision** is to be a leading provider of professional development opportunities through learning, coaching, networking and individual enrichment.