

## **Snippet: Building relationships outside of the credit department**

### **Lucy Hubbard**

When considering the work of a credit manager, it is impossible to overstate the importance of interdepartmental communication. Whether it's the relationship formed with your sales team or your regular communication with the IT department, cross-functional collaboration is key to keeping workflows efficient and aligned.

**Why it matters:** Building relationships outside the credit team can help streamline work across departments, uniting each department as one solid team. While it may be hard to build that relationship when your work feels consuming, finding time to build rapport with other departments can make a big difference in company-wide communication.

For Jeff Cozad, business manager for Patz Corporation (Pound, WI), regularly touching base with his company's sales team has helped both teams manage accounts. "At a minimum, we touch base during a weekly meeting that we hold for all department managers," Cozad said. "I keep in contact with our sales reps to discuss any accounts that have collection issues, and they keep me informed on any potential new customers or any news they hear about existing customers."

The key to a strong working relationship between the two departments is understanding each person's role and what motivates them. "There is a mutual respect in understanding the importance of both of our roles in the sales order process," Cozad said. "I know how challenging it can be for the sales team to find and establish new customers and to close a sale, and they know the challenges I can face in determining the creditworthiness of those customers. We both have the same goal of growing sales for our company, but it needs to be done responsibly."

Cultivating trust with other teams takes effort, but even small, consistent interactions can lead to smoother handoffs and shared goals. Making time for short, casual meetings between departments can help build a strong relationship.

"Once a month, I invite an executive from another department to have lunch with my team and me," said Terri Eggebeen, credit and collections manager at Fechheimer Brothers Company (Cincinnati, OH). "I had a lunch where the vice president of IT came in to talk to my team, and they asked great questions on how we could make the communication between the two departments flow better. It's all about building bridges and keeping in mind that we are one team."

Taking the time to learn about the other departments within your company can help improve internal communication. "If you've just started a job and are looking to establish a relationship with IT, introduce yourself to them and get to know the manager," said Michelle Kelly, [CCE](#), [CCRA](#), [CICP](#), senior credit manager at Mansfield Oil Company of Gainesville, Inc. (Gainesville, GA). "Take them to lunch and say, 'I'm getting to know people in the company, and I wanted to take a few minutes to get to know you. How should someone in my position best interact with you? If we need software or need equipment, how do I approach that?'"

**The bottom line:** It can be easy to become absorbed by the work in the credit department, especially when each day brings new challenges. Taking the time to strengthen communication within your company can streamline the workflow across departments and improve overall morale.