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DATES TO REMEMBER

Award Applications
Due by **March 14**

1st Quarter 2025
Membership Reports
Due by **April 10**

Leading with Gratitude:

How Recognition Fuels Success

Recognition is a vital aspect of effective leadership. Leaders who recognize their teams aren't seen as bosses but rather as human beings who value and respect their employees. Acknowledging and celebrating hard work, achievements and successes lets them know they are valued and that the work they do has an impact. Incorporating regular and meaningful recognition into your leadership style can have a profound impact on your team's success and overall workplace happiness.

Maybe you're not quite sold on this idea and think it's a fluffy part of leadership that you can gloss over. Not so fast—let's take a closer look at the benefits.

Benefits:

- 1. Builds Trust and Loyalty:** Recognition helps build trust and loyalty within the team. When leaders consistently acknowledge contributions, it fosters a positive and supportive work environment. It connects the team to the organization, elevates performance and increases the likelihood that they will stay.
- 2. Encourages Professional Growth:** By recognizing individual strengths and achievements, leaders can encourage professional growth and development. Employees are more likely to take on new challenges and responsibilities when they feel their efforts are appreciated.
- 3. Strengthens Leader-Employee Relationships:** Recognition helps strengthen the relationship between leaders and the members of their team. It creates a sense of mutual respect and understanding, which is essential for effective teamwork.

- 4. Enhances Team Performance:** Regular recognition from leaders can lead to improved team performance. Recognition events such as a team lunch or happy hour not only show gratitude but create a sense of social connection amongst the team leading to better workplace well-being, accountability and commitment to the organization.
- 5. Boosts Team Morale and Motivation:** When leaders recognize their team members' efforts and achievements, it significantly boosts morale and motivation. Gratitude is a positive motivator that inspires people to apply themselves fully and frees them to realize their potential.

Strategies:

With the benefits clear, here are some strategies on how to incorporate recognition into your daily routine.

- 1. Know Your Team:** Make sure that you know each of your team members well enough to know how they prefer to be recognized. Would they appreciate a private note? Or would they prefer a public shout-out?
- 2. Be Genuine:** It is important that you are genuine and that the gratitude is meaningful. Avoid forced comments that may seem superficial or phony.
- 3. Quality:** Saying thank you to someone for completing a task may seem simple. Add to the impact of your thank you by acknowledging the quality of the work. For example, say: "Thank you for putting together that report. I especially appreciated the time you took to polish the formatting."
- 4. Even Small Tasks:** You can show gratitude for small, everyday tasks easily and genuinely with a simple statement such as, "Thanks for getting all of those entered so quickly today, I know there were a lot more than normal."
- 5. Rough Timing:** Something that needs to be squeezed in at the last minute can be disruptive to a person's schedule. If one of your team members has completed something like this, a simple, "Thank you for squeezing that in—I know it wasn't easy, but I appreciate it" goes a long way.
- 6. Unusual After-Hours Assignment:** If a staff member needs to work on the weekend or late one evening, make sure to show your gratitude.
- 7. Practice:** With practice, you will get better at showing gratitude. Stick with it and you'll find it gets easier over time.

Level Up!

Ready to LEVEL UP your passion for recognition? My challenge to you is to recognize someone in your CFDD Chapter for something they have done well. I'm sure you will be pleased with their response and the encouragement you give them to keep going!

Looking to LEVEL UP again? Why not nominate someone in your chapter for a CFDD national award! I'm sure both you and the person you nominate will be joyful with the results!



Kelly Simon, CCE, is Senior Credit & Collections Manager for Outdoor Research in Seattle, Washington. Kelly is currently serving as Vice Chair—Member Services & Publicity on the CFDD National Board of Directors and she is a proud member of the CFDD Seattle and Tacoma Chapters.

Effective Publicity Strategies:

Amplifying Our Voice Across Multiple Platforms

When thinking about publicity, what comes to mind when you think about how you can amplify the voice of your organization across multiple platforms? Perhaps social platforms like LinkedIn, Instagram, TikTok, your website or Facebook come to mind. Others forms of communication such as email, phone calls, or texts can also amplify your efforts to reach out.

What importance does your Chapter and its members place on publicity? The members of the CFDD Oklahoma Board want to share the various strategies for communication and outreach that have effectively worked in their businesses along with their outreach methods to attract and start conversations. There is always strength in numbers.

Communications for Publicity Include:

1. Direct Communication: Reach out directly to your Chapter members along with members of other organizations with phone calls, or consider sharing a copy of your newsletter, sending an email, or extending an invitation to an event such as a webinar. If possible, communicate with NACM members in your area because if they are a member of NACM, they may also be interested in joining CFDD.

Encouraging members and guests to attend your next event is key to keeping the communication going. Don't forget to keep members and prospects informed about your events, resources, and opportunities such as scholarships, for example.

2. Collaborate with Your NACM Affiliate: There are many benefits to partnering with your Affiliate to co-promote your Chapter's events and initiatives. This expands your Chapter's publicity platform as well as your Affiliate's platform by creating greater awareness and opportunity. CFDD Oklahoma partnered with NACM Southwest to create a program aimed at helping members and guests achieve personal growth and build professional success through education and networking opportunities. Through collaboration, we created a forum to share stories while learning from professional experts about three hot topics, resulting in not only a successful program but also in gaining members for both organizations.

Submit Your Nominations for CFDD National Awards by March 14



Award Nominations Welcome

In Recognition of **Chapter Excellence**

- Outstanding Regular Program
- Outstanding Seminar or Workshop
- Outstanding Chapter Publicity Award
- Membership Growth

In Recognition of **Member Excellence**

- National Mentor Achievement
- Distinguished Member Achievement (DMA)
- The Spirit Award

Completed applications should be sent as an email attachment to cfdd@nacm.org.

[Download the Application](#)

- 3. Leveraging Social Media Platforms:** Facebook can be used to engage members by providing updates, information about live events, and even discussions. Facebook Groups for community building is a great option for conversations and learning discussions for all participants. Facebook Messenger can be used for this purpose as well and you can make that a private group just for members. LinkedIn is a great platform for professional networking and sharing industry-related content. LinkedIn can be used to showcase member achievements and promote Chapter events.
- 4. Use Email Marketing:** In addition to a phone call, text, or voice mail, I believe in the importance of a well-crafted, effective email strategy to inform and engage members. Tailor your email messages for different groups within your membership or send a personalized email to ask how a member is doing or to let them know that you look forward to seeing them virtually in the next Zoom or TEAMS meeting. Consider extending a personal invitation to someone to join your next meeting or let them know you appreciate them – personal messages are so valuable. If a member hasn't participated in a while, reach out and ask how they are doing and be sure to listen carefully to learn if there is a way to help them solve a problem or overcome a challenge. Not only is the intelligence about challenges important when building future education topics but personal conversations build relationships.
- 5. Create Engaging Content:** What captures your attention on social media platforms? There is a variety of content types (articles, videos, infographics) that can capture the interest of both current and prospective members. Our Board finds that tying a fundraising campaign or initiative to a prize for contributing leads to increased engagement and greater success. Creating a video about the initiative and sharing your Chapter's goals through pictures can captivate an audience and even inspire readers to share it, attracting others to the topic. Reaching out across Chapters creates success in numbers, cultivates fresh ideas, starts conversations and promotes sharing opportunities to make a difference.
- 6. Evaluating Effectiveness:** Have your efforts and methods of publicity impacted the outcome and gotten you the results you were seeking for your Chapter? Take a survey and ask questions to evaluate how effective an initiative was or get feedback at a virtual meeting. When studying participation, ask whether someone was invited as a guest and gift them with the opportunity of continuous education in exchange for participation. Our Chapter uses SurveyMonkey to gather feedback from members and we look at likes and comments on social media platforms or study any available social media analytics. Taking a look at the methods used and adapting strategies based on member feedback and engagement metrics helps us adjust the communications to get the most attention and best outcomes. How many people engaged, sent an RSVP and showed up to the next event?

Final Thoughts

Chapters can adopt or adapt to these and many more strategies to enhance their publicity efforts. Please share with us: What are your Chapter's successful strategies and experiences for publicity? We would love to share your story and learn from you in the next newsletter.



Michele Miller, CBF, is a Senior Accounting and Credit Analyst for Silver Star Construction Co., Inc. in Moore, Oklahoma. Michele currently serves as Vice President of the CFDD Oklahoma Chapter and as the Director representing CFDD Oklahoma on the CFDD National Board.

CFDD AT CREDIT CONGRESS



Sheila Roames, CCE



Brett Hanft, CBA



Val Hardesty, CCE, CICP



Wendy Mode, CCE, CICP



Alaina Worden, CCE



Natalie Harrison, CBA



DeLinda Goodman, CCE



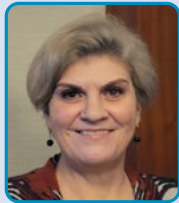
Marlene Groh, CCE, ICCE



Nancy Watson-Pistole, CCE



Anissa Martin, CCE



D'Ann Johnson, CCE

CFDD Members share their knowledge and expertise by leading the following sessions:

Have You Cashed In on Your Well-Deserved Upgrade?

Speaker: Sheila Roames, CCE

**Building a Championship Credit Team:
Staying at the Top of Your Game**

Speaker: DeLinda Goodman, CCE

**Fraud Attempts at Every Turn:
Key Learnings on How to Be Prepared When
Fraudsters Come Knocking on Your Door!**

Speaker: Brett Hanft, CBA

**Mastering the Transition:
Strategies for Success as a New Credit Manager**

Speakers: Marlene Groh, CCE, ICCE and Val Hardesty, CCE, CICP

Best Practices for Building Trust

Speaker: Nancy Watson-Pistole, CCE

Best Practices Roundtable Discussion

Moderator: Wendy Mode, CCE, CICP

**Navigating Credit & Recovering in a Softening Market:
What's Impeding Timely Payment?**

Speakers: Anissa Martin, CCE and Alaina Worden, CCE

Harmonizing Hard and Soft Skills for Career Success

Speaker: Nancy Watson-Pistole, CCE

**Unintentional Bias:
How It Affects Everyday Decisions**

Speaker: D'Ann Johnson, CCE

Understanding Workaholism and Burnout

Speaker: Natalie Harrison, CBA



Transitioning from an Informal Leader to a Formal Leader:

Strategies for Success

Leadership can take many forms, but one of the most significant transitions in any professional journey is moving from being an informal leader (a peer) to a formal leader (a supervisor or manager). This transition can be challenging as it requires shifting both mindset and behaviors while navigating new responsibilities, expectations and relationships.

I'm sure you are thinking, "what challenges might I face?" Let's look at some of the challenges and then explore some strategies to ensure a smooth and successful shift to formal leadership.

Acknowledge and Manage the Shift in Power Dynamics

Once you move into a formal leadership role, your relationship with your former colleagues may change. With that newfound authority it can sometimes create tension or awkwardness.

Here are a few steps you can take to acknowledge the shift:

- ◆ **Set Clear Boundaries:** Be transparent with your team about the change in your role and responsibilities.
- ◆ **Maintain Respect and Professionalism:** As a formal leader, you still want to preserve the relationships you built as a peer. Strive to balance your role as a manager with your role as a colleague, treating everyone with respect and fairness.
- ◆ **Establish Your Authority Without Being Authoritarian:** You don't have to be overly strict or distant to assert your authority. Rather, lead with confidence and clarity, and involve team members in collaborative efforts when possible.

Develop Leadership Skills Beyond Technical Expertise

As an informal leader, you may have been the subject matter expert, earning respect through your competence. While technical expertise remains important, a formal leadership role requires a broader skill set, including:

- ◆ **Communication Skills:** Effective communication becomes even more critical as a manager. You will need to articulate goals, expectations, and feedback while actively listening to your team. This helps build trust and ensures that everyone is aligned.
- ◆ **Emotional Intelligence:** The ability to recognize, understand, and manage emotions—both your own and your team's—is essential. Being an emotionally intelligent leader allows you to build stronger relationships, navigate conflicts, and motivate your team effectively.
- ◆ **Delegation:** In your new role, you'll be responsible for delegating tasks and responsibilities. Trusting your team with work not only relieves you from micromanaging but also empowers them to grow and take ownership of their roles.

Set Clear Expectations and Provide Regular Feedback

One of the key distinctions of formal leadership is the responsibility to guide and assess team performance. To do this effectively:

- ◆ **Define Roles and Responsibilities:** Ensure that each team member understands their job scope and what is expected of them. Clear role definitions help avoid confusion and minimize friction.

- ◆ **Offer Constructive Feedback:** Don't wait until annual reviews to provide feedback. Regular one-on-ones foster continuous improvement and create an environment where open communication is valued. When giving feedback, be specific, balanced and solutions-oriented.
- ◆ **Establish Goals:** Collaboratively set goals with your team to give them a sense of direction and purpose. Make sure these goals are realistic, measurable, and aligned with both individual aspirations and your company's organizational objectives.

Foster Team Collaboration and Empowerment

One of the challenges that comes with formal leadership is balancing authority with empowerment. A formal leader should not only make decisions but also foster an environment where team members feel valued and supported.

- ◆ **Encourage Collaboration:** While you may have to make the final decisions, seek input and feedback from your team. This not only empowers your colleagues but also promotes a culture of collaboration. Involving your team in the decision-making process increases engagement and buy-in.
- ◆ **Promote Ownership:** Delegate tasks and allow your team to take the lead on projects. This promotes a sense of responsibility and encourages personal and professional growth.
- ◆ **Be Transparent:** Share company goals, changes and challenges openly with your team. Transparency builds trust and allows your team to see the bigger picture.

Build Your Own Support Network

As a formal leader, you will face new challenges, and it's essential to have a support system. This is where you can unintentionally isolate yourself so it's a huge step in your transition process. Building relationships with other managers or mentors who have made the transition themselves can provide valuable insights and guidance.

- ◆ **Seek Mentorship:** Find mentors who can help you navigate the transition. They can offer advice on handling difficult situations and managing team dynamics.
- ◆ **Connect with Peers:** Build relationships with other leaders in the organization or industry to exchange ideas, experiences and strategies for success.
- ◆ **Invest in Self-Development:** Continuous learning and growth are essential for any leader. Take advantage of leadership training programs to enhance your leadership skills.

Now Seeking Donations

silent
AUCTION

Benefiting the NACM Scholarship Foundation
and the CFDD Scholarship Fund

Monday, May 19 | 5:00-6:30pm



Maintain a Growth Mindset

The transition from informal to formal leadership is a learning process. It's essential to adopt a growth mindset—view challenges as opportunities for learning and growth rather than obstacles. Reflect regularly on your leadership practices, ask for feedback from your team, and continuously strive to improve.

- ◆ **Be Open to Learning:** As a formal leader, you will encounter new experiences and challenges that you haven't faced before. Embrace these as opportunities to develop and refine your leadership style.
- ◆ **Learn from Mistakes:** Leadership involves decision-making, and not every decision will be perfect. When you make mistakes, acknowledge them, learn from them, and use them as stepping stones for growth.
- ◆ **Encourage a Learning Culture:** Foster a culture where team members are encouraged to learn and grow. This enhances both individual and collective performance and promotes a healthy, dynamic work environment.

Transitioning from an informal leader to a formal leader is a significant milestone that requires intentional growth, self-awareness, and a commitment to developing new skills. By acknowledging the shift in power dynamics, expanding your leadership capabilities, setting clear expectations, fostering collaboration, building a support network and maintaining a growth mindset, you can make this transition successfully. Leadership is a continuous journey, and with the right strategies in place, you can navigate the complexities of formal leadership and inspire your team to achieve great things.



Natalie Harrison, CBA, is Assistant Credit Manager at National Beef Packing Company in Kansas City, Missouri. Natalie serves on the CFDD National Board as Vice Chair—Education, Programs & Chair Elect and is a proud member of the CFDD Wichita and CFDD Kansas City Chapters.

APPLY TO EARN AN NACM PROFESSIONAL DESIGNATION

Apply to take the exam.

Call the NACM education dept. at 410-740-5560
or visit www.nacm.org/certification.html

Applications due: **April 4, 2025**

Exam date: **May 18, 2025** (Credit Congress, Cleveland, OH)

Start prepping now.

Check out exam review courses in NACM's Credit Learning Center. Visit clc2.nacm.org to sign up.





April 2025 Membership Milestones

Celebrating **25** YEARS

Beverly Eldridge
CFDD Albuquerque Chapter

Celebrating **20** YEARS

DeLinda Goodman, CCE
CFDD Louisville Chapter

Celebrating **5** YEARS

Kimberly Jones, CBA
CFDD Portland Chapter

Shannon Owen
CFDD Louisville Chapter



CFDD National Board of Directors Meeting
Tuesday, May 20
10:45am-1:45pm

CFDD Annual Business Meeting & Awards Luncheon
Wednesday, May 21
Noon-2:00pm

CFDD LEADERSHIP MEETINGS AT CREDIT CONGRESS



CMI SURVEY

Earn 0.1 roadmap points each month
Receive email alerts when survey opens

Monday, March 3-Tuesday, March 11
Monday, April 7-Tuesday, April 15
Monday, May 5-Thursday, May 22



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.