

2023

OHIO

ANNUAL MEETING

MEETING AGENDA



IN-PERSON

Courtyard Dayton North
7087 Miller Lane
Dayton, OH 45414



TUESDAY

MARCH 28

2023 DAYTON OH

TUESDAY MARCH 28 9 AM – 5 PM EST

SPONSORS

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**ALL REGISTRATIONS ARE
TAKEN ONLINE AT
nacmconnect.org/annual-meetings**

While registering online, you will have the opportunity to choose your payment method. We are happy to take a credit card online or invoice you. You will also have the opportunity to apply coupons as allowed.

Cancellation Policy: Cancellations must be received in writing, via email or mail no later than two weeks prior to the meeting date to qualify for a full refund. Cancellations received later than two weeks prior to the meeting date DO NOT qualify for a refund of registration fees. Substitutions are allowed. Sorry, phone cancellations cannot be honored.

QUESTIONS? Please contact Lillian Novak at lillian.novak@nacmconnect.org

CEU points and CCE recertification points are available for all educational sessions.

9:15 – 9:30 A.M.

OPENING REMARKS

Phil Lattanzio, CCE, President & COO, NACM Connect

9:30 – 10:30 A.M.

ROUNDTABLE DISCUSSION – PORTALS

*Terri Eggebeen, Fechheimer Brothers Co.,
Kent Smith, CBA, CICP, The Bundy Companies*

As the use of portals continues to grow, so does the frustration of using them. While each portal is different, there are some similarities and aggravations we all share. In this roundtable discussion on portals in general, members will be invited to share their experiences, successes in working with portals...and defeats. Come armed with your stories and your questions!

10:45 A.M. – 12:00 P.M.

HOW TO MAKE A CONFIDENT CREDIT DECISION

*Panelists: Cliff Chamberlain, CPA, Cincinnati Container Co. Inc., Terri Eggebeen, Fechheimer Brothers Co.,
Caroline Perkins, CCE, Credit Manager, Mickey Thompson Tire Company*

In an interactive workshop, random scenarios for credit requests will be worked out by the attendees with the assistance of the panel. Join us for what promises to be a fun session that will test what you know about credit decisions while learning new ways to assess your customer's requests.

1:00 – 2:00 P.M.

THE WONDERFUL FREE BENEFITS OF MEMBERSHIP

Darren Greene, Credit Solutions Consultant and Jim Kelly, Credit Solutions Consultant, NACM Connect

NACM Connect offers a variety of free services to our members but we find more and more that our members aren't fully aware of these benefits. Craig Smith is going to walk through some of the more robust features we offer that will help your staff save time, allow you to generate reports for management, and keep an eye on your portfolio.

2:15 – 3:15 P.M.

CREATING THE PERFECT CREDIT POLICY

Brian Jackiw, Partner, Tucker Ellis

Credit professionals often are thrust into an uncomfortable spot between protecting their companies from entering into transactions bearing excessive collection risk or extending overly-generous credit terms, and a sales force itching to complete transactions. This conflict puts an enterprise at risk of inconsistency in the application of credit practices, and in generating uncollectible accounts. These risks can often be mitigated through the institution of a formal credit policy. During this presentation, our panelists will discuss the benefits of a thoughtful and carefully drafted credit policy, both within the enterprise and in dealings with customers. These benefits are numerous, but include increased consistency in dealing with troubled accounts, reduced conflict among the credit and sales departments of an enterprise, and enhanced protections in the event that a customer becomes insolvent or bankrupt. We will also walk participants through a sample credit policy, identifying best practices for preparing a credit policy, specific provisions that are desirable to include in a policy, and suggestions as to how to encourage your company to adopt a formal credit policy.

3:30 – 5:00 P.M.

NETWORKING EVENT