

# 2024 WISCONSIN ANNUAL MEETING

IT FEELS GOOD TO RECONNECT...



THURSDAY  
APRIL 25

**REGISTRATION DEADLINE:**  
APRIL 18

**START AT**  
9:00 AM



*Join us to learn and network with your peers and leaders in the commercial credit profession.*



**Marc Davenport**  
AVP Customer Experience  
Caine & Weiner



**Joseph Lange, CCE, CCRA, ICCE**  
Senior Credit Manager  
Brenntag North America, Inc.



**Kendra Gerdes, CBA**  
Credit Manager  
Systems, LLC



**James Brown**  
Founder & Owner  
BKwire.com



**Thomas Fawkes**  
Partner  
Tucker Ellis LLP



**Brian Jackiw**  
Partner  
Tucker Ellis LLP

## THE STATE OF CREDIT AND COLLECTIONS

## MEETING AGENDA

### IN-PERSON

Holiday Inn Pewaukee  
N14 W24140 Tower Place  
Pewaukee, WI 53072  
262-506-6300

### PRICING

\$199 members  
*(Two coupons per company are valid)*  
\$398 nonmembers

[WWW.NACMCONNECT.ORG](http://WWW.NACMCONNECT.ORG)

**QUESTIONS?** Please contact Lillian Novak at  
[lillian.novak@nacmconnect.org](mailto:lillian.novak@nacmconnect.org)

SPEAKERS

## THURSDAY, APRIL 25 9 A.M. — 5 P.M. CDT

**Registration Deadline | April 18**

### 9:15 A.M. - 9:30 A.M. OPENING REMARKS

*Phil Lattanzio, CCE, President & COO, NACM Connect*

### 9:30 A.M. – 10:30 A.M.

#### DON'T DO BUSINESS WITH STRANGERS

*Marc Davenport, AVP Customer Experience, Caine & Weiner*

Now more than ever this best practice should become standard operating procedure. Please note the following: According to collection agency research, the average delay for a past due payment is 55 days for large businesses and 66 days for SMB's. The larger the balance owed the lower the probability the balance will be paid in full.

During this session Marc will discuss the following and much, much, more!

- o Establishing Your Terms of Business (TOB)
- o The Best Defense is a Strong Offense
- o If I don't know you, how can we do business.
- o Pay Attention to the Red Flags

### 10:45 A.M.– 12:00 P.M.

#### HOW TO MAKE A SOUND CREDIT DECISION

*Joseph Lange, CCE, CCRA, ICCE, Brenntag North America, Inc. and Kendra Gerdes, CBA, Systems, LLC*

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 customers' requests.

### 12:00 P.M. – 1:00 P.M. LUNCH

### 1:00 P.M. – 2:00 P.M.

#### THE IMPACT OF BANKRUPTCIES - DEEPER THAN YOU THINK

*James Brown, Founder and Owner, BKwire.com*

In the year 2023, more than 18,000 businesses filed for bankruptcy, which affected over 400,000 creditors. Such bankruptcy filings can have significant impacts on your company, and it's crucial to be aware of the potential risks. If one of your customers files for bankruptcy, it can negatively affect your business, and the impact can even extend beyond that if your customer's customer also files for bankruptcy. In this session, we will delve into this topic in greater detail and learn how to use data to uncover the hidden effects of bankruptcy filings on your business. It's important to take proactive measures to safeguard your company and arm yourself with the knowledge you need to mitigate the risks and protect your business in the long run.

**ALL REGISTRATIONS ARE TAKEN  
ONLINE AT [WWW.NACMCONNECT.ORG](http://WWW.NACMCONNECT.ORG)**

### 2:15 P.M. – 3:30 P.M.

#### AI AND THE CREDIT DEPARTMENT

*Thomas Fawkes and Brian Jackiw, Partners, Tucker Ellis LLP*

While artificial intelligence (AI) has been around for decades, there have been enormous advances in the technology over the past several years that have now made it viable for business applications, including credit. AI stands to transform the credit industry as we know it, and the benefits of AI are apparent: automation of customer onboarding and underwriting, predictive analytics, data management, collections, and forecasting is now possible, which could in the future substantially expedite decision making and reduce credit department labor costs. There are, however, substantial risks: the technology is still developing, is still prone to errors, and cannot – at least at this time – navigate around unforeseen events and replace the experience and judgment of tenured (human) credit professionals. During this presentation, we will discuss the benefits and opportunities of integrating AI into your company's credit function, along with the legal and business risks and challenges associated with the current AI technology.

### 3:30 P.M – 5:00 P.M. BUSINESS MEETING & RECEPTION

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**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.