



# The Credit Tour 2025

# connected.

## PITTSBURGH

### June 17

## SPOTLIGHT SPONSOR



## Meeting Agenda

Pittsburgh Marriott North  
 100 Cranberry Woods Drive  
 Cranberry Township, PA 16066

**REGISTRATION DEADLINE: JUNE 10**

**PRICING:**

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

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

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### PLATINUM



### GOLD



### BRONZE



### SILVER



## Tuesday

June 17, 9:00 a.m. – 3:30 p.m. ET

9:00 a.m. – 9:20 a.m. Registration and Coffee Service

9:20 a.m. Opening Remarks – Frank Schetski

9:30 a.m. – 10:30 a.m.  
**Protecting Your Bottom Line – Identifying and Preventing Fraud in Commercial Credit Transactions**  
*Shawn McClure, Partner, Bernstein & Burkley*

In today's fast-paced commercial credit environment, fraud schemes are becoming more sophisticated, putting businesses at significant risk of financial losses. This presentation is designed specifically for credit managers, equipping them with the knowledge and tools necessary to detect and prevent fraud in commercial credit transactions. We will discuss trends in commercial credit fraud, red flags and risk indicators, effective prevention strategies, collaborative defense as well as other key factors in identifying and preventing fraud.

10:45 a.m. – 12:00 p.m.  
**Setting a Timeline for Successful Collections**  
*Abby Odneal, President & COO, NACM Southwest; Toni Drake, President, TRMG Financial Services, Inc.*

Basic collection techniques tell us that placements that are not too old have a better chance of being collected than older ones. But does your collection strategy include the best possible times for each step in the collections process to maximize success? When should a demand letter go out? Should there be different strategies for new customers and long-time customers? This session will provide you with actionable strategies to improve cash flow and reduce delinquency rates.

12:00 p.m. – 12:45 p.m. – Lunch

12:45 p.m. – 1:00 p.m. – NACM Connect News and Updates – Phil Lattanzio

1:00 p.m. – 2:00 p.m.  
**Downsizing Terms – A Roundtable Discussion**  
*Paul Ott, CCE, Retired (U.S. Steel)*

In recent years there have been demands from customers to grant longer terms. In cases where you've allowed this, many credit professionals are now looking to take back the reigns and get customers back to their "normal" terms. But how do you accomplish this without potentially offending your customer? In this open roundtable, we will share examples of strategies, successes (and failures). If you find yourself in this situation, here's a place you can pick up a tip or two from your fellow credit managers.

2:15 p.m. – 3:30 p.m.  
**Economic Update**  
*Chris Kuehl, PhD, Partner, Armada Corporate Intelligence (Virtual)*

With the new administration things are changing fast, and many of the changes have a direct impact on the economy. Join us for an insightful and engaging session as we delve into the current state of the economy and its implications for the commercial credit landscape.



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