

# CREDIT SKILLCON '21

LEARN 21+ CREDIT SKILLS OVER LUNCH

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Live Expert  
Training



On-Demand  
Workshops



Panel  
Discussions



Executive  
Roundtables

June 14 – July 20  
12–2 PM CT

Master  
**#21Skills**in21Days

Team  
Training

Certificates





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# Learn From the Industry's Best



**Robert Shultz**

Founder, Quote to Cash Solutions (Q2C) LLC



**Jessica Butler**

Founder, Attain Consulting Group



**John Zimmer**

President, Receivable Training Associates



**Scott Blakeley**

Partner at Blakeley LLP



**Richard C. Macias**

Of Counsel, Maynard Cooper & Gale



**Wanda Borges**

Borges & Associates, LLC



**Brodie Oldham**

Sr. Director of Analytic Consultancy, Experian



**Mike Flum**

President and Chief Operating Officer, CreditRiskMonitor



**Lina Chindamo**

Director, Enterprise Accounts, Creditsafe



**Eric Kider**

Sr. Vice President, Data and Credit Solutions, Data Axle



**Gregory Johnson**

Chief Operating Office, Cortera



**Shamaria Smallis**

Chief Of Staff, SPHR, Caine and Weiner



**Scott Taylor**

Director Of Product Development, Fiserv



**Kim Erickson**

Owner, Principal Optimize Consulting



**John M. Donovan**

Principal Consultant Order to Cash, Credit & Collections



**Jerry Bailey**

Executive Education Services Mgr, NCS Credit





# Panel Discussions

JUN

29<sup>th</sup>

12-1 PM CT

## Credit Data to Decisions: Navigating Bankruptcies and SMB Risk

Join our experts as they discuss strategies that best-performing credit teams have adopted to alleviate risk and make better credit decisions.

CREDIT SCORING

PORTFOLIO ANALYSIS

### PANELISTS:



**Brodie Oldham**

Sr. Director of Analytic Consultancy, Experian



**Mike Flum**

President and Chief Operating Officer, CreditRiskMonitor



**Eric Kider**

Sr. Vice President, Data and Credit Solutions, Data Axle



**Gregory Johnson**

Chief Operating Office, Cortera



**Lina Chindamo**

Director, Enterprise Accounts, Creditsafe

JUN

24<sup>th</sup>

12-1 PM CT

## Attorney Insights: Riding the Bankruptcy 2.0 Wave in 2021

Join the US leading creditor's rights and bankruptcy attorneys as they discuss consignment agreements, reclamation rights, and UCC rules to help trade creditors protect their business against bankruptcy proceedings.

BANKRUPTCY

### PANELISTS:



**Scott Blakeley**

Partner at Blakeley LLP



**Richard Macias**

Of Counsel, Maynard Cooper & Gale



**Wanda Borges**

Borges & Associates, LLC

JUN

16<sup>th</sup>

12-1 PM CT

## Hiring & Developing Top Credit Talent in 2021 | Secrets Unlocked

Join our experts as they discuss the key strategies to attract the right talent and develop a roadmap for long-term growth in the credit department.

RECRUITING AND TALENT MANAGEMENT

### PANELISTS:



**Scott Taylor**

Director Of Product Development, Fiserv



**Shamaria Smallis**

Chief Of Staff, SPHR, Caine and Weiner

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# Featured Sessions

JUN 18<sup>th</sup>  
12-1 PM CT

## Setting SMART Goals, Meetings and KPIs

Understand how to utilize your credit teams to enhance productivity by enabling them to leverage 'SMART' goals.

RECRUITING AND TALENT MANAGEMENT



**Robert S. Shultz**  
Founder, Quote to Cash  
Solutions (Q2C) LLC

JULY 16<sup>th</sup>  
12-1 PM CT

## Alternatives to Bank Financing: Factoring, LOC, Guarantees and Bonds

Join this live workshop to learn how to utilize LOC, guarantees, and Bonds as securities to manage risk against breaches.

A/R FINANCING



**Robert S. Shultz**  
Founder, Quote to Cash  
Solutions (Q2C) LLC

JULY 12<sup>rd</sup>  
1:30-2:30 PM CT

## Deductions Problem Solving and Negotiation Strategies

Join this live session to grab the best way to approach and prepare for an upcoming customer settlement meeting using the right communication approach.

DEDUCTIONS RESOLUTION



**Jessica Butler**  
Founder, Attain  
Consulting Group

JUN 23<sup>th</sup>  
12-1 PM CT

## A/R Manager's Guide to Account Closing and Cash Forecasting

Expert session to help A/R professionals optimize their cash management and seamlessly reconcile a large numbers of accounts every month.

CASH RECONCILIATION

EXCEPTION HANDLING



**John M. Donovan**  
Principal Consultant  
Order to Cash,  
Credit & Collections

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# Paid Workshops

Zoom Workshop

JULY 19–20<sup>th</sup>  
12–2 PM CT

## A Holistic Approach to Determine Customer Creditworthiness

Join this live session to get a holistic view of your customer’s creditworthiness and learn the best practices to determine their financial health.

FINANCIAL STATEMENT ANALYSIS

CREDIT SCORING



**Robert S. Shultz**

Founder, Quote to Cash Solutions (Q2C) LLC

\$149

REGISTER NOW

Zoom Workshop

JUN 21–22<sup>th</sup>  
12–2 PM CT

## Creating Excel Deductions Dashboard for Senior Management

Join this live hands-on training on the good old Excel to build your deductions dashboard and analyze the health of your deductions process.

KPIs AND REPORTING



**Jessica Butler**

Founder, Attain Consulting Group

\$149

REGISTER NOW

Executive Roundtable

JULY 14<sup>th</sup>  
12–1 PM CT

## Onboarding New Applicants for Credit

Join this credit execs round table to understand steps and strategies to create a seamless onboarding process for your department.

CREDIT APPLICATION

FINANCIAL STATEMENT ANALYSIS



**Robert S. Shultz**

Founder, Quote to Cash Solutions (Q2C) LLC

\$79

REGISTER NOW

Zoom Workshop

JUN 14–16<sup>th</sup>  
12–2 PM CT

## Collectors Bootcamp: Call Techniques, Win-win Negotiations & Overcoming Objections

Join our expert across a 3-day collectors boot camp to get a win-win strategy for faster collections and better customer relationships.

COLLECTIONS CALL NEGOTIATIONS

COLLECTION EMAIL AND LETTERS



**John Zimmer**

President, Receivable Training Associates

\$199

REGISTER NOW



# Our Partners

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Week 1

June 14–18, 2021

Monday | June 14, 2021

12–2 PM CT

COLLECTORS

\$199

## Best-In-Class Collection Call Techniques and Strategies

Collections Bootcamp Day 1

LIVE

John Zimmer

1:30–2:30 PM CT

CREDIT ANALYST

## Reading and Interpreting Credit Reports

On-Demand

CREDIT MANAGERS

## Building the Right Credit Policy

On-Demand

Tuesday | June 15, 2021

12–2 PM CT

COLLECTORS

\$199

## Different Types of Collection Call & Creating a Win-Win Negotiation

Collections Bootcamp Day 2

LIVE

John Zimmer

1:30–2:30 PM CT

CREDIT MANAGERS

## Portfolio Analysis During Recession

On-Demand

Wednesday | June 16, 2021

12–1 PM CT

## Hiring & Developing Top Credit Talent in 2021 | Secrets Unlocked

Panel Discussion

12–2 PM CT

COLLECTORS

\$199

## How to Overcome Stalls & Objections in a Collections Call

Collections Bootcamp Day 3

LIVE

John Zimmer

Thursday | June 17, 2021

12–2 PM CT

CREDIT MANAGERS

## Credit Sales Collaboration

On Demand

1:30–2:30 PM CT

## SAP Customer Master Data Management | T-Codes & Best Practices

SAP

On-Demand ERP

DEDUCTIONS ANALYST

## Trade Deductions and Non-Trade Deductions

On Demand

## Oracle Customer Data Management Training

ORACLE

On-Demand ERP

## Microsoft Dynamics Customer Database Management 101

Microsoft Dynamics 365

On-Demand ERP

Friday | June 18, 2021

12–1 PM CT

CREDIT MANAGERS

## Setting SMART Goals, Meetings and KPIs

Robert Shultz

On Demand

1:30–2:30 PM CT

## Configuring Company Code & Sales Data in SAP Customer Master

SAP

On-Demand ERP

## Configuring Customer Master Data in Oracle

ORACLE

On-Demand ERP

## Maintaining Customer Data in Microsoft Dynamics

Microsoft Dynamics 365

On-Demand ERP



### Monday | June 21, 2021

12–2 PM CT

DEDUCTIONS MANAGERS

\$149

#### Creating Excel Deductions Dashboard for Senior Management – Day 1

Jessica Butler

LIVE

COLLECTORS

#### Collections Calling & Negotiation

Robert Shultz

On-Demand

### Tuesday | June 22, 2021

12–2 PM CT

DEDUCTIONS MANAGERS

\$149

#### Creating Excel Deductions Dashboard for Senior Management – Day 2

Jessica Butler

LIVE

1:30–2:30 PM CT

CREDIT MANAGERS

#### The Big 3 – Anti-trust, ECOA & FCRA

On-Demand

### Wednesday | June 23, 2021

12–1 PM CT

A/R MANAGER

#### A/R Manager's Guide to Account Closing and Cash Forecasting

John Donovan

LIVE

1:30–2:30 PM CT

#### Understanding Credit Scoring in SAP

SAP

On-Demand ERP

#### Understanding Oracle Credit Policies & Scoring Models

ORACLE

On-Demand ERP

#### Understanding Credit Limit & Scoring in Microsoft Dynamics

Microsoft Dynamics 365

On-Demand ERP

#### NetSuite Credit Rating and Scoring 101

ORACLE NETSUITE

On-Demand ERP

### Thursday | June 24, 2021

12–1 PM CT

#### Attorney Insights: Riding the Bankruptcy 2.0 Wave in 2021

Panel Discussion

1:30–2:30 PM CT

#### Configuring a Credit Scoring Model in SAP

SAP

On-Demand ERP

#### Maintaining Credit Policies and Scoring formulas in Oracle

ORACLE

On-Demand ERP

#### Configuring Credit Limits & Scores in Microsoft Dynamics

Microsoft Dynamics 365

On-Demand ERP

#### Credit Scoring Model Configuration in NetSuite

ORACLE NETSUITE

On-Demand ERP

### Friday | June 25, 2021

12–1 PM CT

CREDIT MANAGERS

#### Key KPIs to Track as a Credit Manager

On-Demand

1:30–2:30 PM CT

DEDUCTIONS MANAGERS

#### Mitigating the Challenges of Trade Deductions

Recorded Panel Discussion

On-Demand



# Week 3

June 28–30, 2021

Tuesday | June 29, 2021

12–1 PM CT

Credit Data to Decisions –  
Navigating Bankruptcies  
& SMB Risk

Panel Discussion

Wednesday | June 30, 2021

12–1 PM CT

DEDUCTIONS MANAGER

Resolving Trade Deductions for  
Big Box Retailers

Kim Erickson

Live

1:30–2:30 PM CT

A/R ANALYSTS

KPIs Reporting and Dashboard

On-Demand



### Monday | July 12, 2021

12-1 PM CT

CREDIT MANAGERS

TBA

Jerry Bailey

 LIVE

1:30-2:30 PM CT

DEDUCTIONS ANALYSTS

**Deductions Management and Negotiation Strategies**

Jessica Butler

 LIVE

### Tuesday | July 13, 2021

12-1 PM CT

CREDIT ANALYST | CREDIT MANAGERS

TBA

Wanda Borges

 Live

1:30-2:30 PM CT

CREDIT MANAGERS

**UCC Filings and Liens**

 On-Demand

### Wednesday | July 14, 2021

12-1 PM CT

**Virtual Roundtable: Onboarding New Customers for Credit**

\$149

 EXECUTIVE ROUNDTABLE

1:30-2:30 PM CT

**SAP FSCM Collections 101**

**SAP**

 On-Demand ERP

**Oracle Advanced Collections Fundamentals**

**ORACLE**

 On-Demand ERP

**Understanding Aging Reports in Microsoft Dynamics**

 Microsoft Dynamics 365

 On-Demand ERP

**A/R Aging Reports and Analysis Fundamentals**

**ORACLE**  
NETSUITE

 On-Demand ERP

### Thursday | July 15, 2021

12-1 PM CT

CREDIT ANALYSTS | CREDIT MANAGERS

**Preference Provision in Bankruptcy: How to Keep your A/R Safe?**

Scott Blakeley

 LIVE

1:30-2:30 PM CT

**SAP Collections Strategies and Prioritized Worklists Configuration**

**SAP**

 On-Demand ERP

**Oracle Advanced Collections: Universal Work Queue**

**ORACLE**

 On-Demand ERP

**Customizing Aging Reports in Microsoft Dynamics D365**

 Microsoft Dynamics 365

 On-Demand ERP

**A/R Aging Report Customization & Analysis In NetSuite**

**ORACLE**  
NETSUITE

 On-Demand ERP

### Friday | July 16, 2021

12-1 PM CT

CREDIT ANALYSTS | CREDIT MANAGERS

TBA

Richard Macias

 LIVE

1:30-2:30 PM CT

CREDIT MANAGERS

**Alternatives to Bank Financing: Factoring, LOC, Guarantees & Bonds**

Robert Shultz

 On-Demand



# Week 5

July 19–20, 2021

Monday | July 19, 2021

12–2 PM CT

CREDIT ANALYSTS

\$149

## A Holistic Approach to Determine Customer Creditworthiness

DAY 1 | Robert Shultz

 LIVE

Tuesday | July 20, 2021

12–2 PM CT

CREDIT ANALYSTS

\$149

## A Holistic Approach to Determine Customer Creditworthiness

DAY 2 | Robert Shultz

 LIVE



# Master **#21Skills**in21Days



Financial Statement Analysis

KPIs and Reporting

Bankruptcy

Credit Application

A/R Frauds and Laws

Cash Reconciliation

Credit Scoring

Deductions 101

Collections Prioritization

A/R Financing and Risk Mitigation

Collection Emails and Letters

Credit Policy

Deductions Resolution

Collections Call Negotiations

Portfolio Analysis

Big Box Deductions

Exception Handling

Stakeholder Management

Recruiting and Talent Management

Customer Master Data

Cash Forecasting

Team  
Training

Proof of Completion  
Certificates

**REGISTER FOR FREE**