

CREDIT TODAY



LEARN 21+ CREDIT SKILLS OVER LUNCH

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Live Expert Training



Panel Discussions



On-Demand Workshops



Executive Roundtables

June 14 - July 20 12-2 PM CT

Master
#21Skillsin21Days

Team Training



Contents

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- 2. Panel Discussions
- 3. Featured Sessions
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- 5. Partners
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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

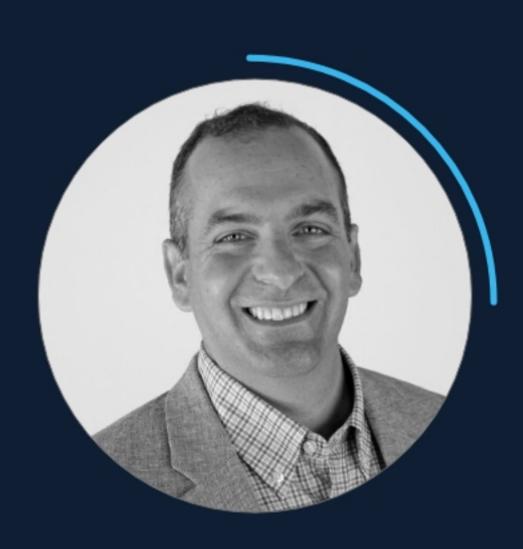


Richard C. Macias

Of Counsel, Maynard Cooper & Gale

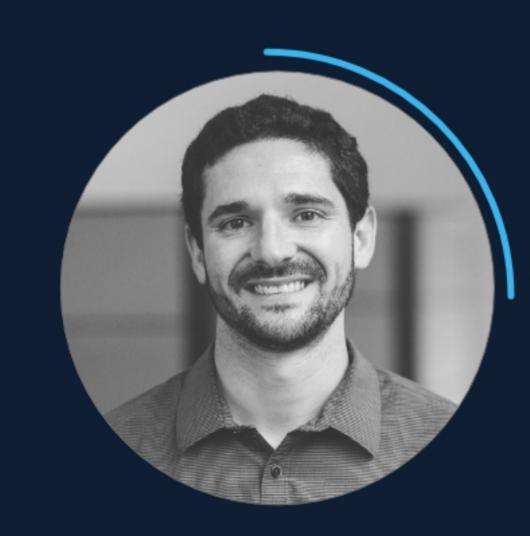


Wanda Borges
Borges & Associates, LLC



Brodie Oldham

Sr. Director of Analytic
Consultancy, Experian



Mike Flum

President and Chief Operating
Officer, CreditRiskMonitor



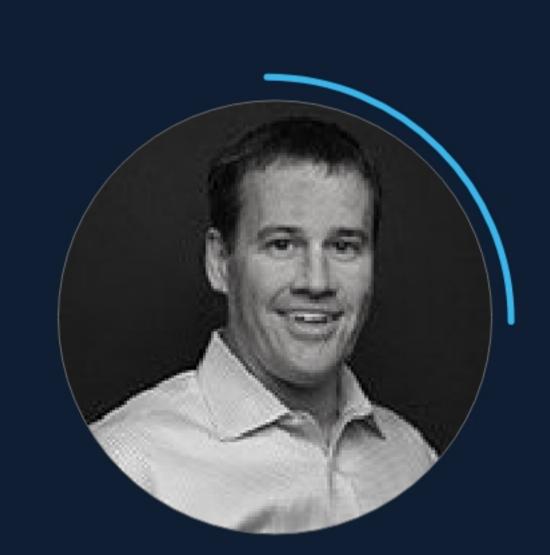
Lina Chindamo

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

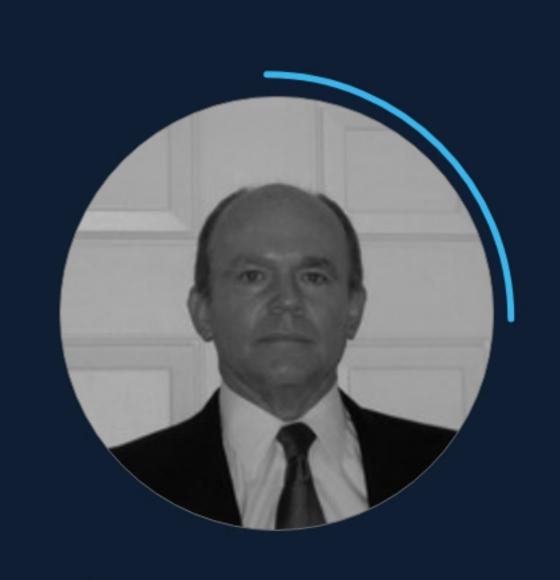
Director Of Product

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



29th

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



24th

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



16th

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





18th

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



16th

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



12rd

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



23th

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

Paid Workshops





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



21-22th

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



14th

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

Zoom Workshop



REGISTER NOW

14-16th

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













Event Calendar



June 14-18, 2021

Monday | June 14, 2021



1:30-2:30 PM CT **CREDIT ANALYST** Reading and Interpreting **Credit Reports O** On-Demand **CREDIT MANAGERS Building the Right Credit Policy ⊙** On-Demand

Tuesday | June 15, 2021



1:30-2:30 PM CT **CREDIT MANAGERS** Portfolio Analysis During Recession **⊙** On-Demand

Wednesday | June 16, 2021



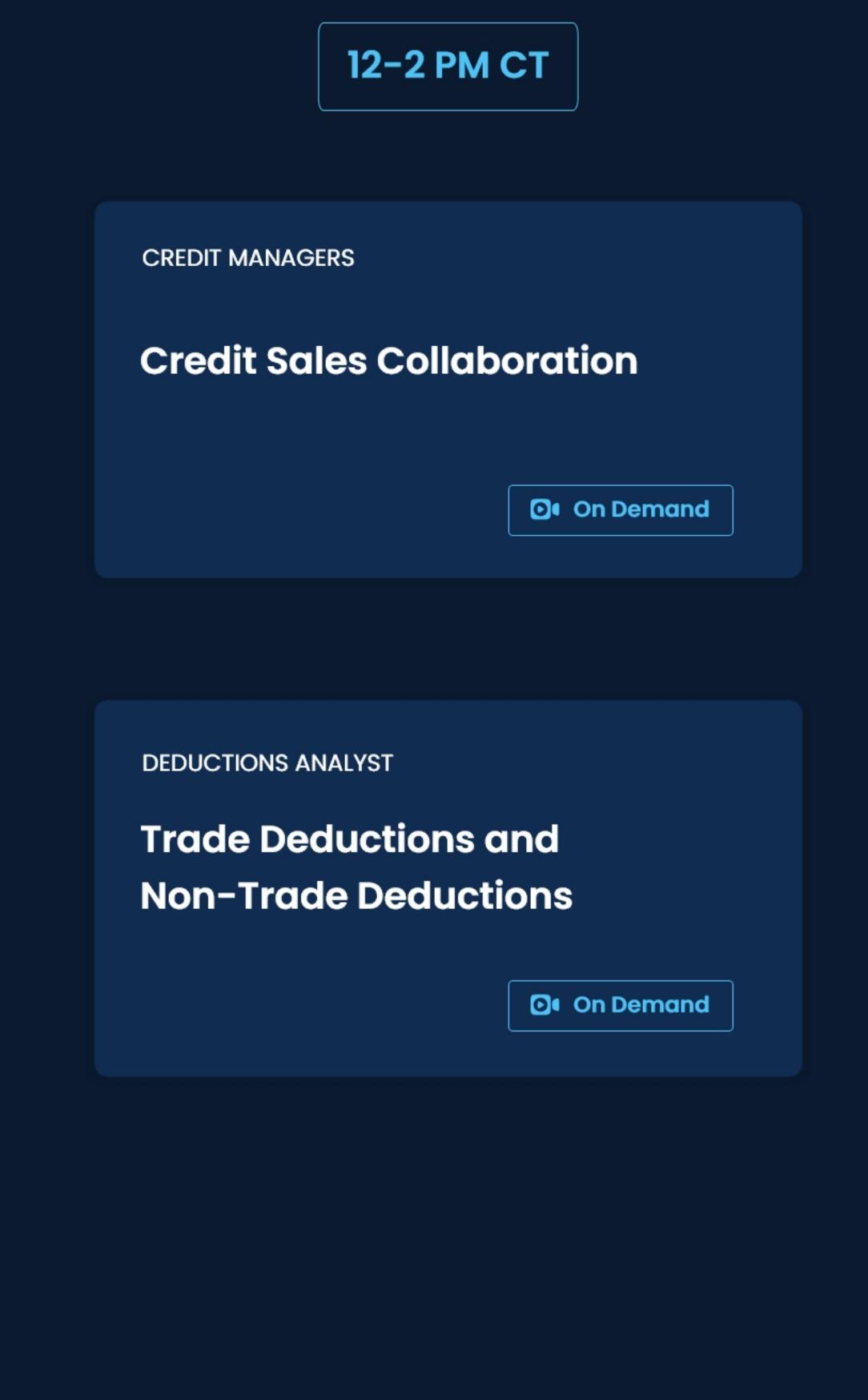
12-1 PM CT

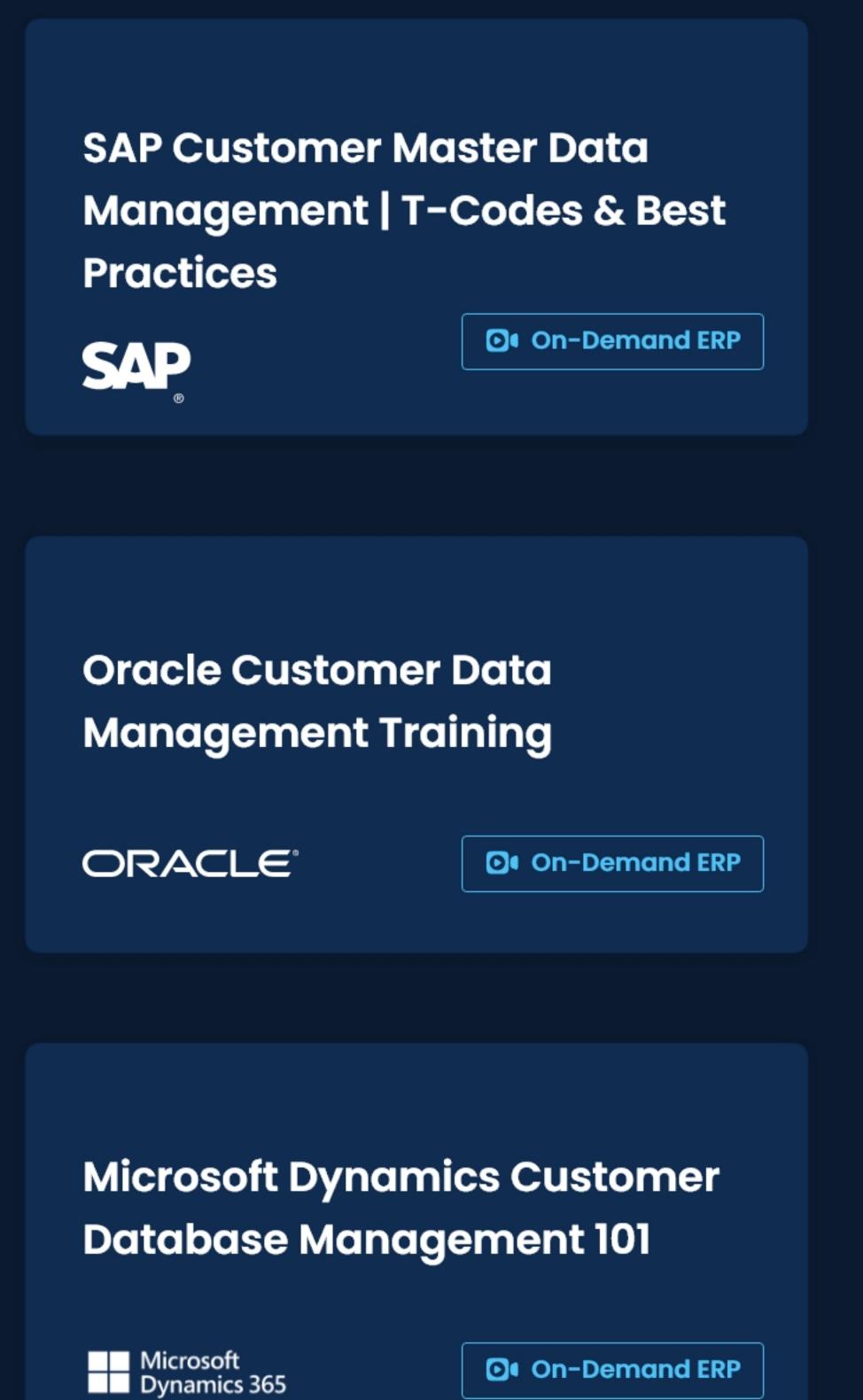
\$199 **COLLECTORS** How to Overcome Stalls & Objections in a Collections Call Collections Bootcamp Day 3 **⊙** LIVE **John Zimmer**

1:30-2:30 PM CT

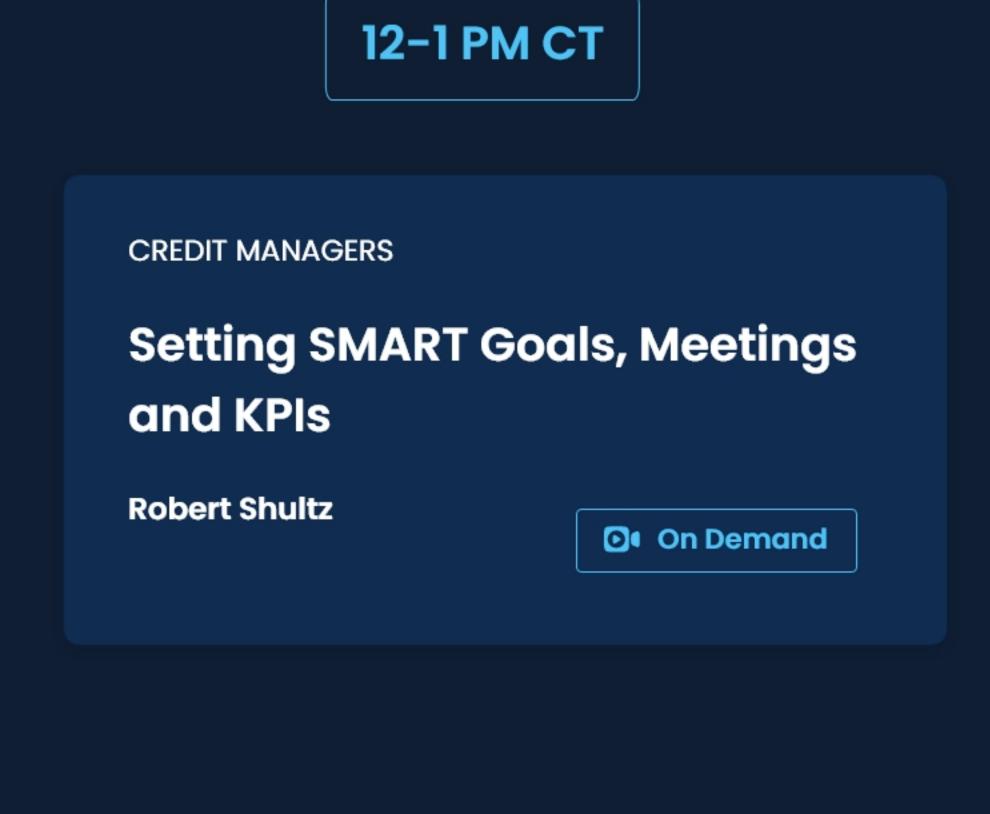
12-2 PM CT

Thursday | June 17, 2021





Friday | June 18, 2021



1:30-2:30 PM CT Configuring Company Code & Sales Data in SAP Customer Master On-Demand ERP SAP

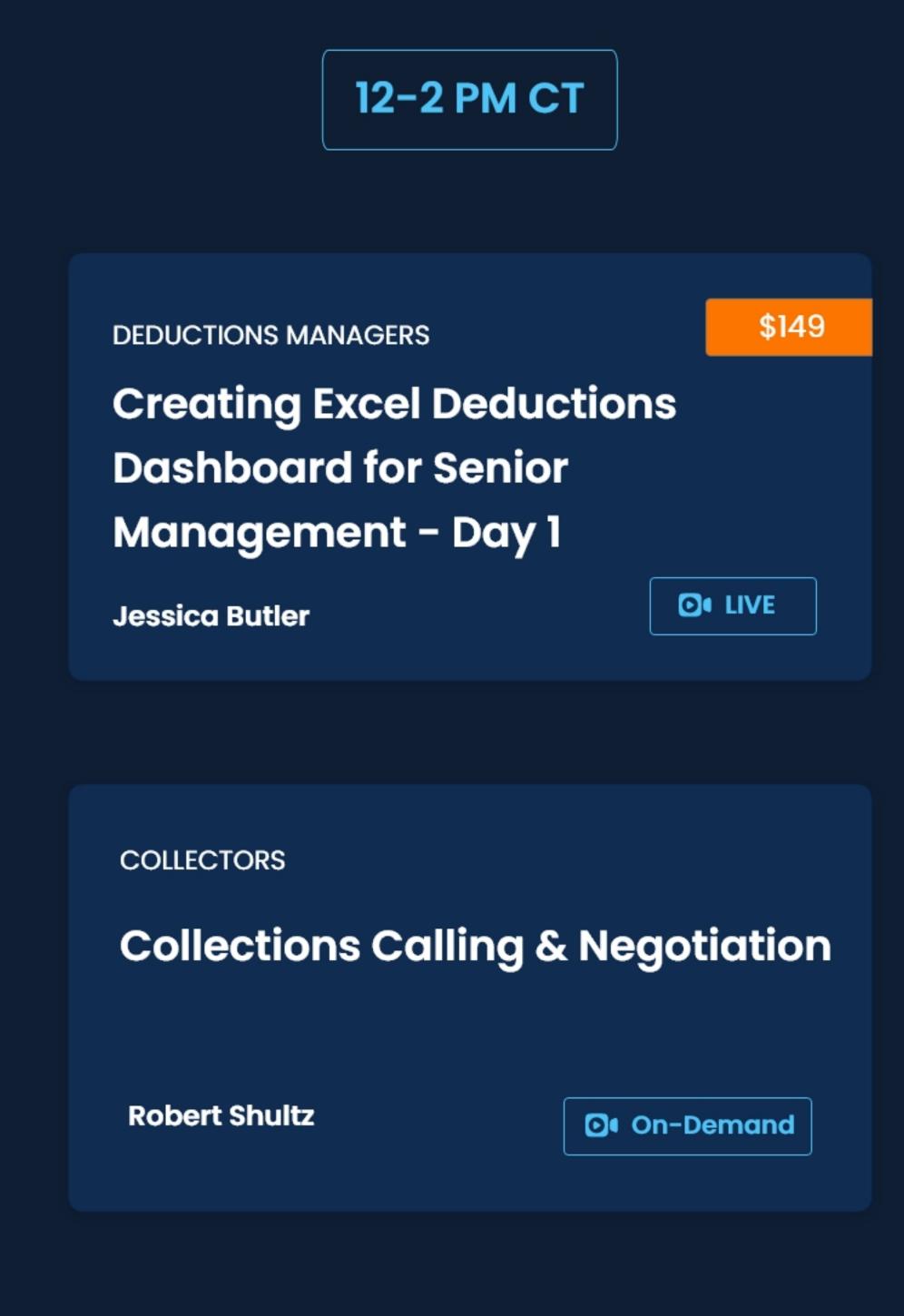
Data in Oracle ORACLE" On-Demand ERP Maintaining Customer Data in **Microsoft Dynamics** Microsoft
Dynamics 365

⊙ On-Demand ERP

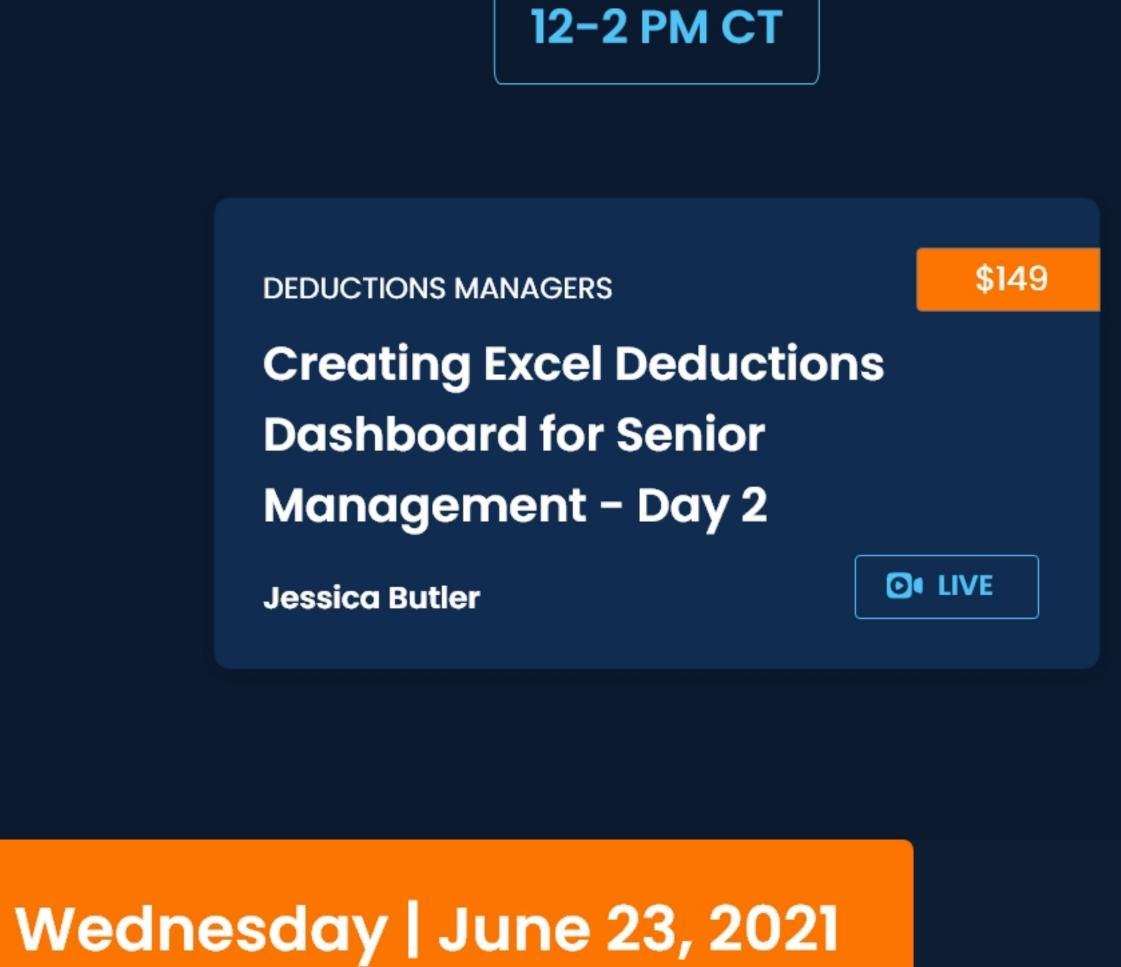
Configuring Customer Master

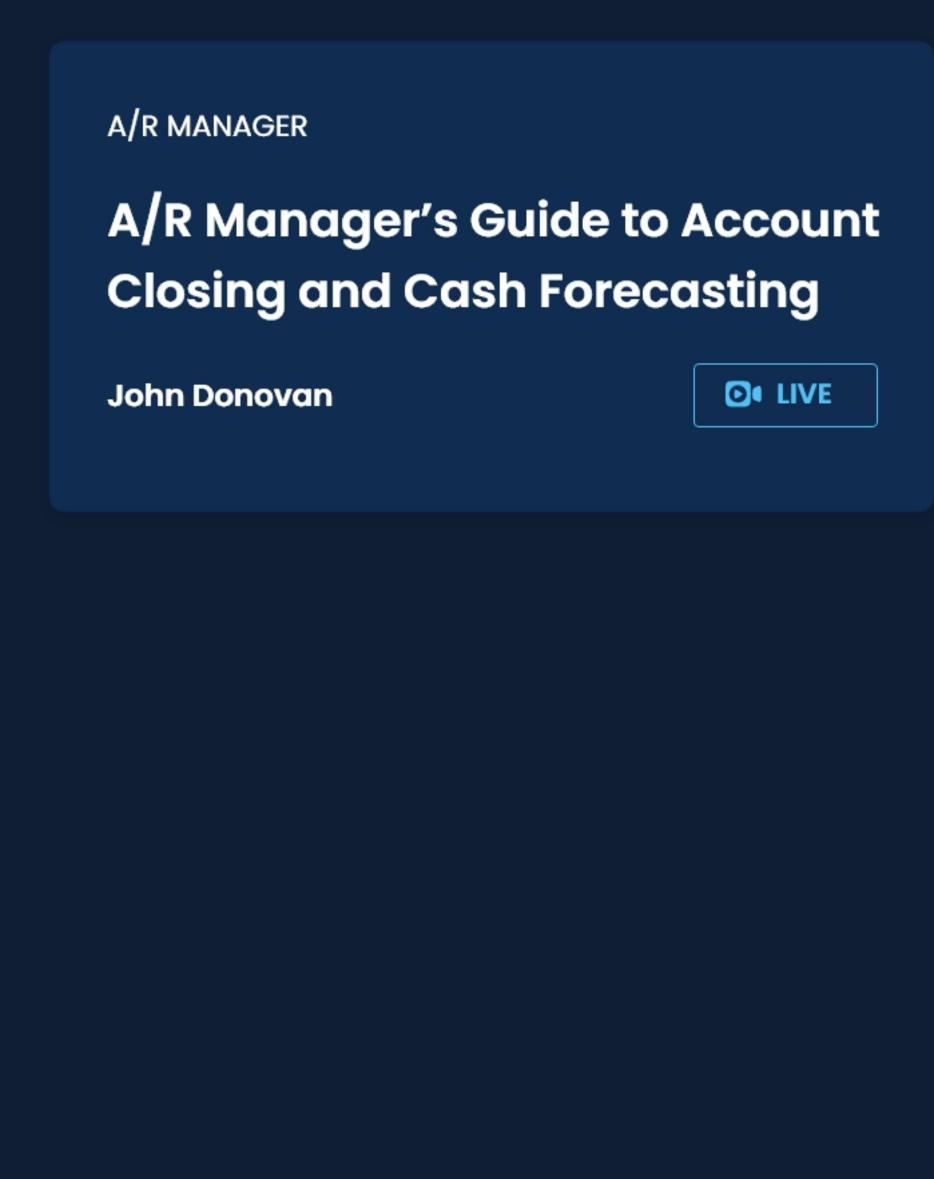


Monday | June 21, 2021



Tuesday | June 22, 2021





12-1 PM CT

Thursday | June 24, 2021

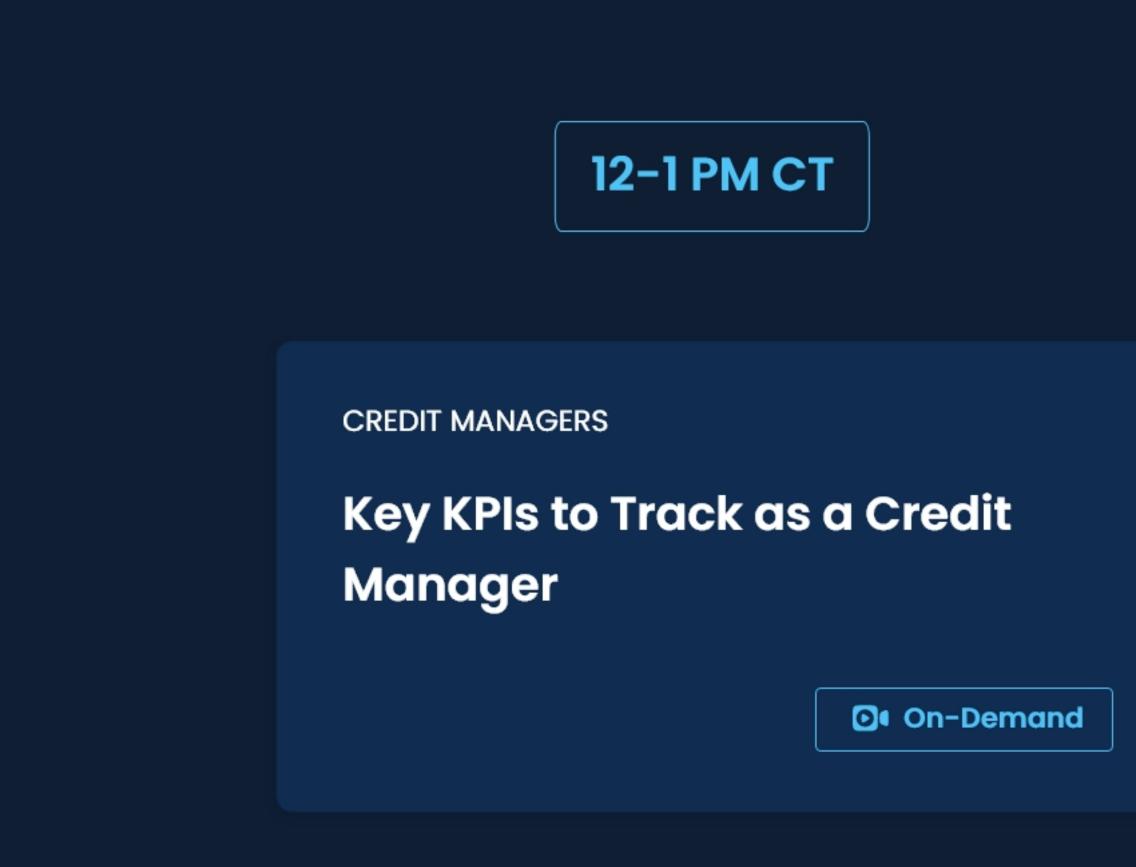
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Panel Discussion
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12-1 PM CT

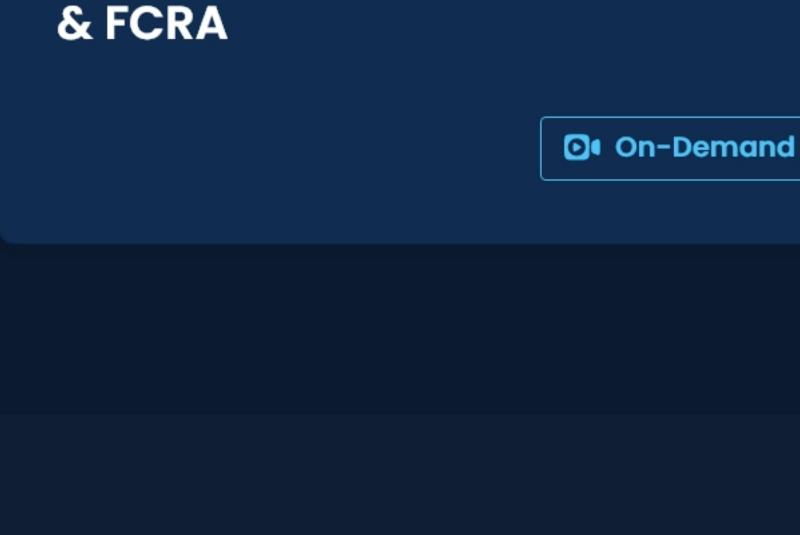
Attorney Insights: Riding the

Bankruptcy 2.0 Wave in 2021

Friday | June 25, 2021



1:30-2:30 PM CT



The Big 3 - Anti-trust, ECOA

CREDIT MANAGERS

Understanding Credit Scoring in SAP SAP **⊙** On-Demand ERP

Understanding Oracle Credit

On-Demand ERP

On-Demand ERP

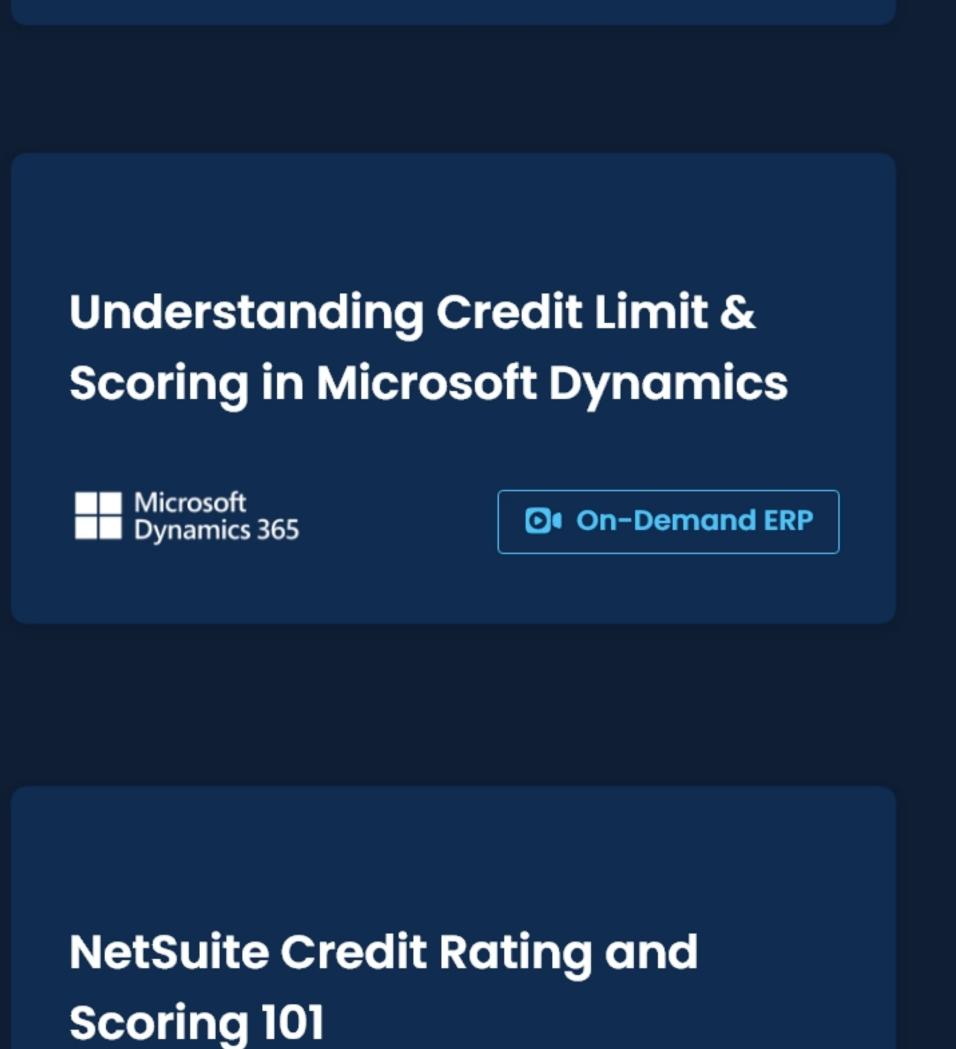
Policies & Scoring Models

ORACLE"

ORACLE"

NETSUITE

1:30-2:30 PM CT



Configuring a Credit Scoring

Model in SAP

1:30-2:30 PM CT



On-Demand ERP

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Configuring Credit Limits &
Scores in Microsoft Dynamics
Microsoft
                    ⊙ On-Demand ERP
Dynamics 365
```

Credit Scoring Model

ORACLE"

NETSUITE

Configuration in NetSuite

On-Demand ERP

1:30-2:30 PM CT **DEDUCTIONS MANAGERS** Mitigating the Challenges of **Trade Deductions Recorded Panel Discussion ⊙** On-Demand



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

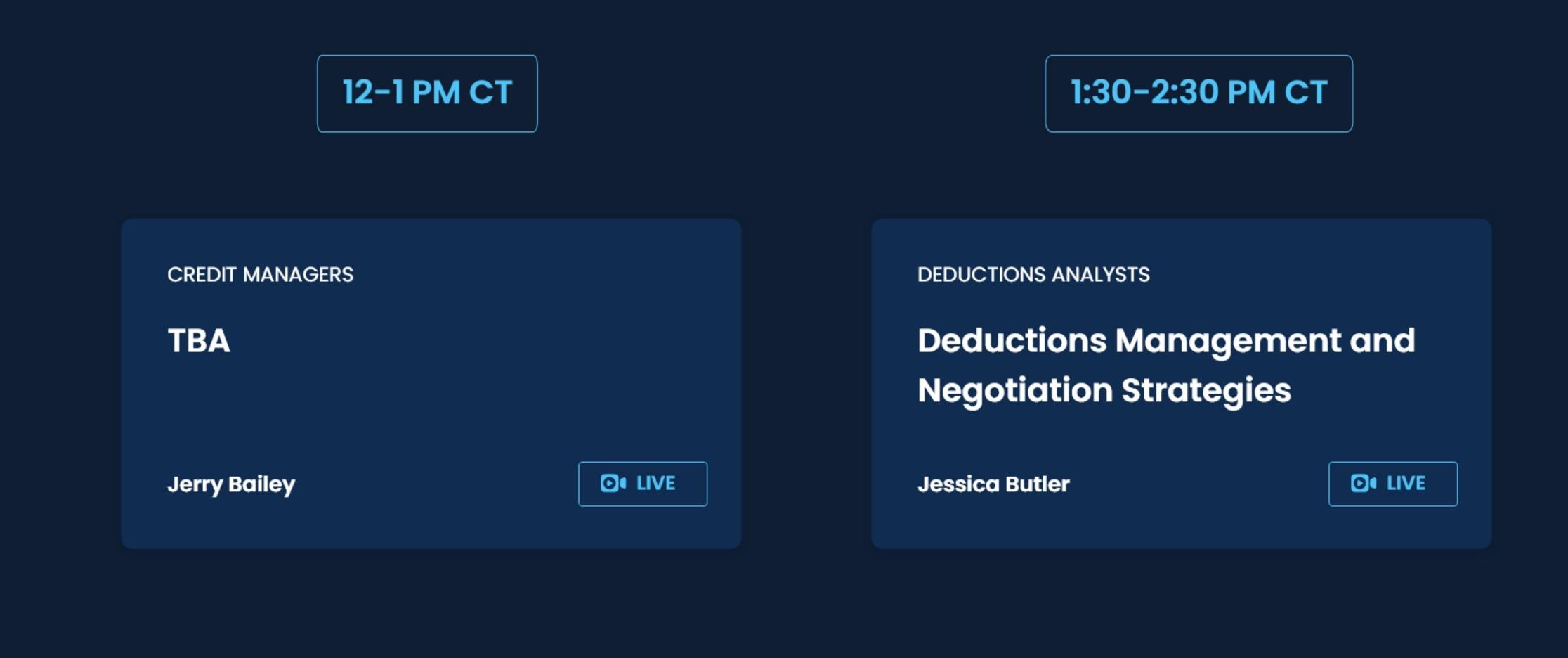
A/R ANALYSTS

KPIs Reporting and Dashboard

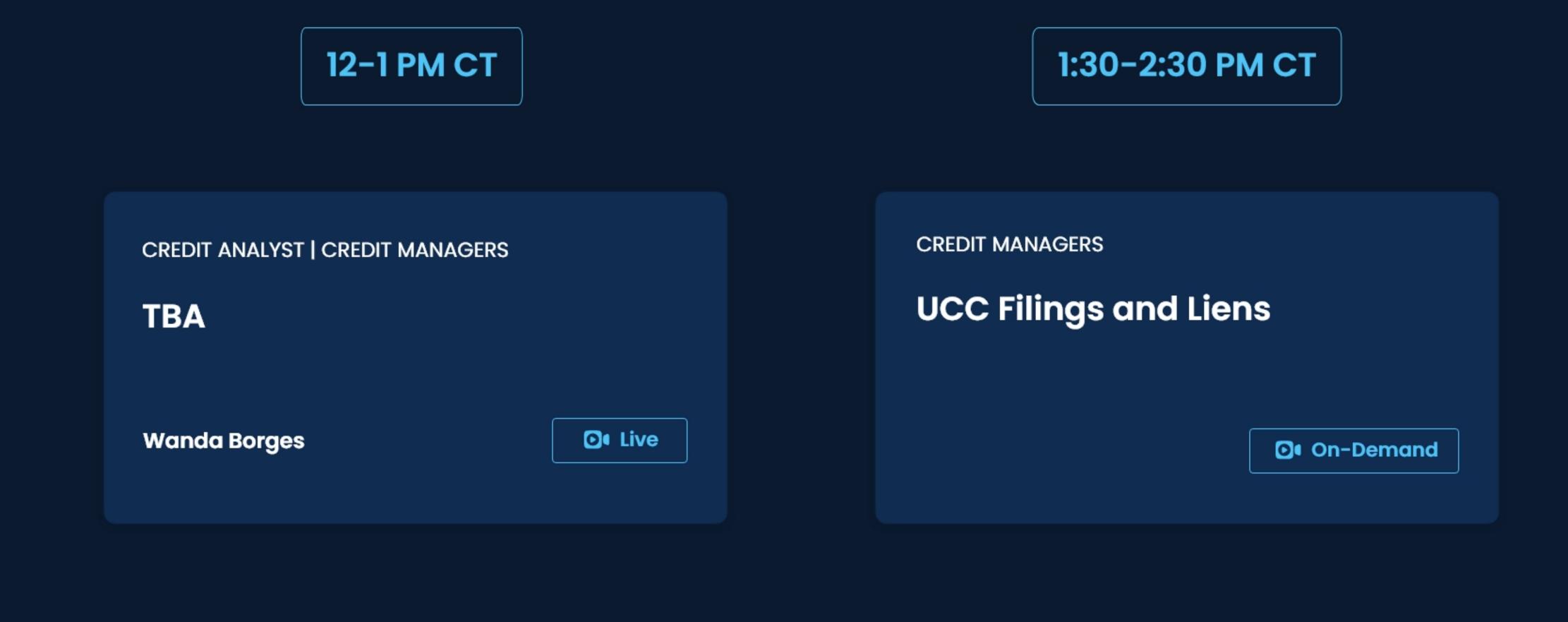
O On-Demand



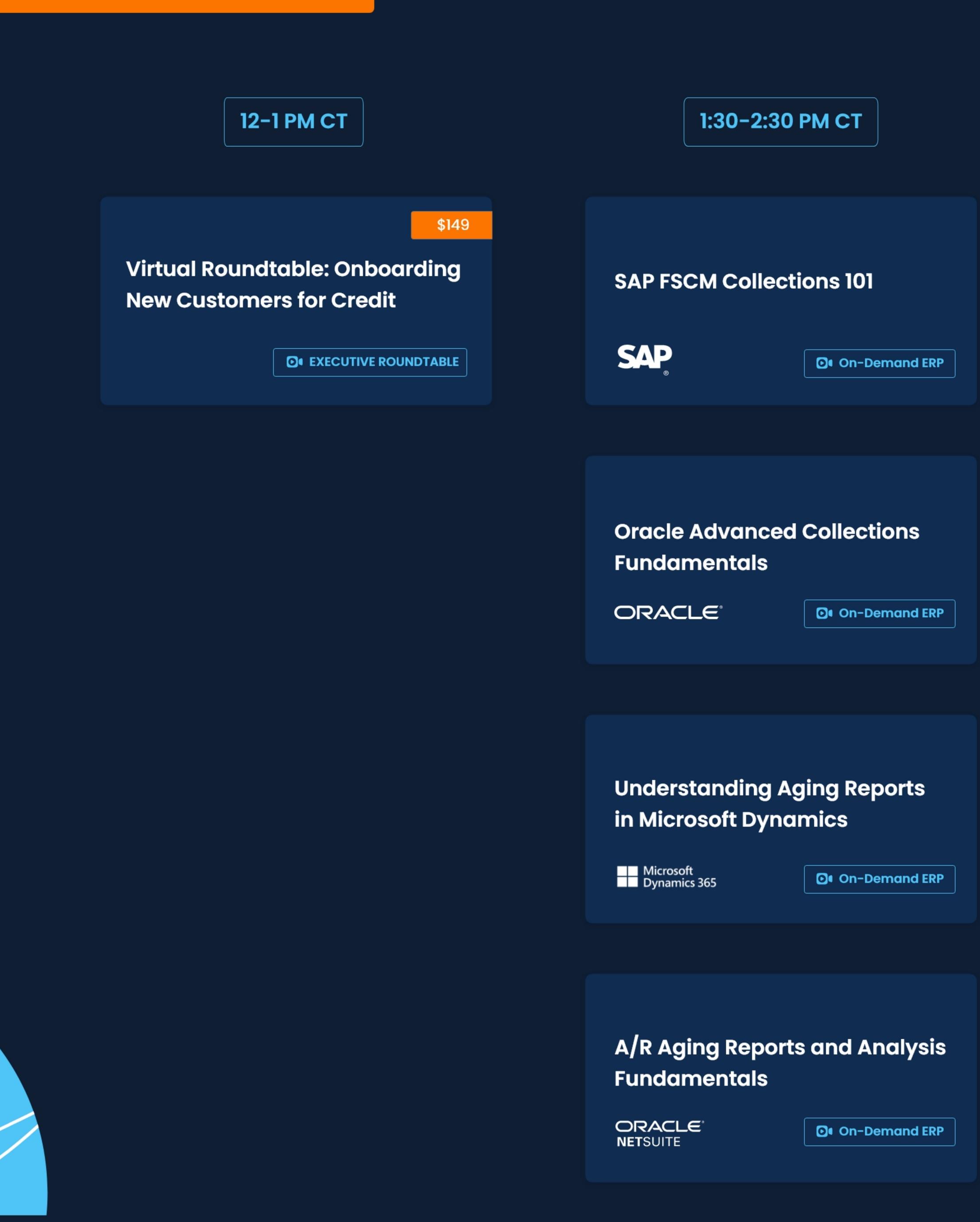
Monday | July 12, 2021

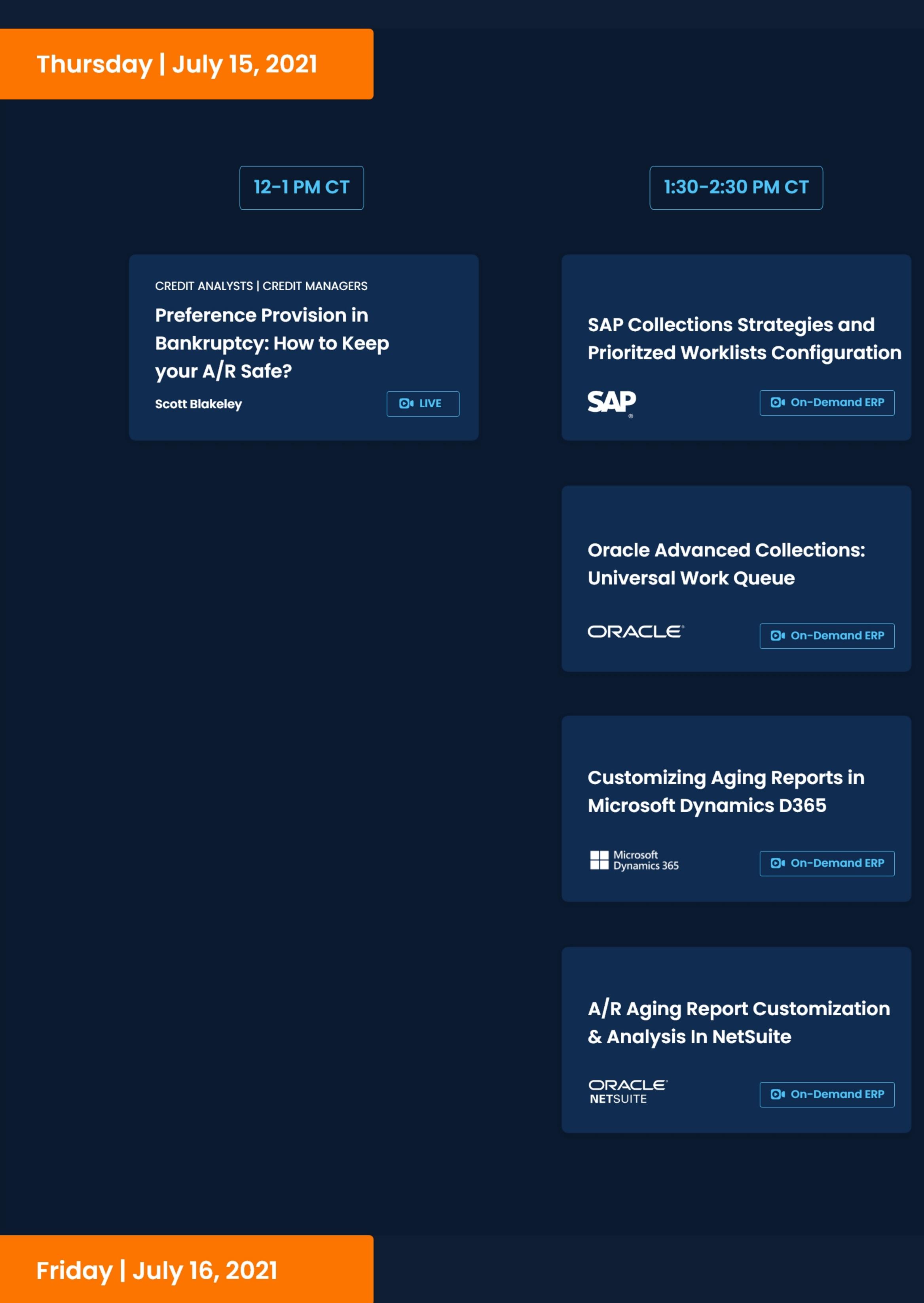


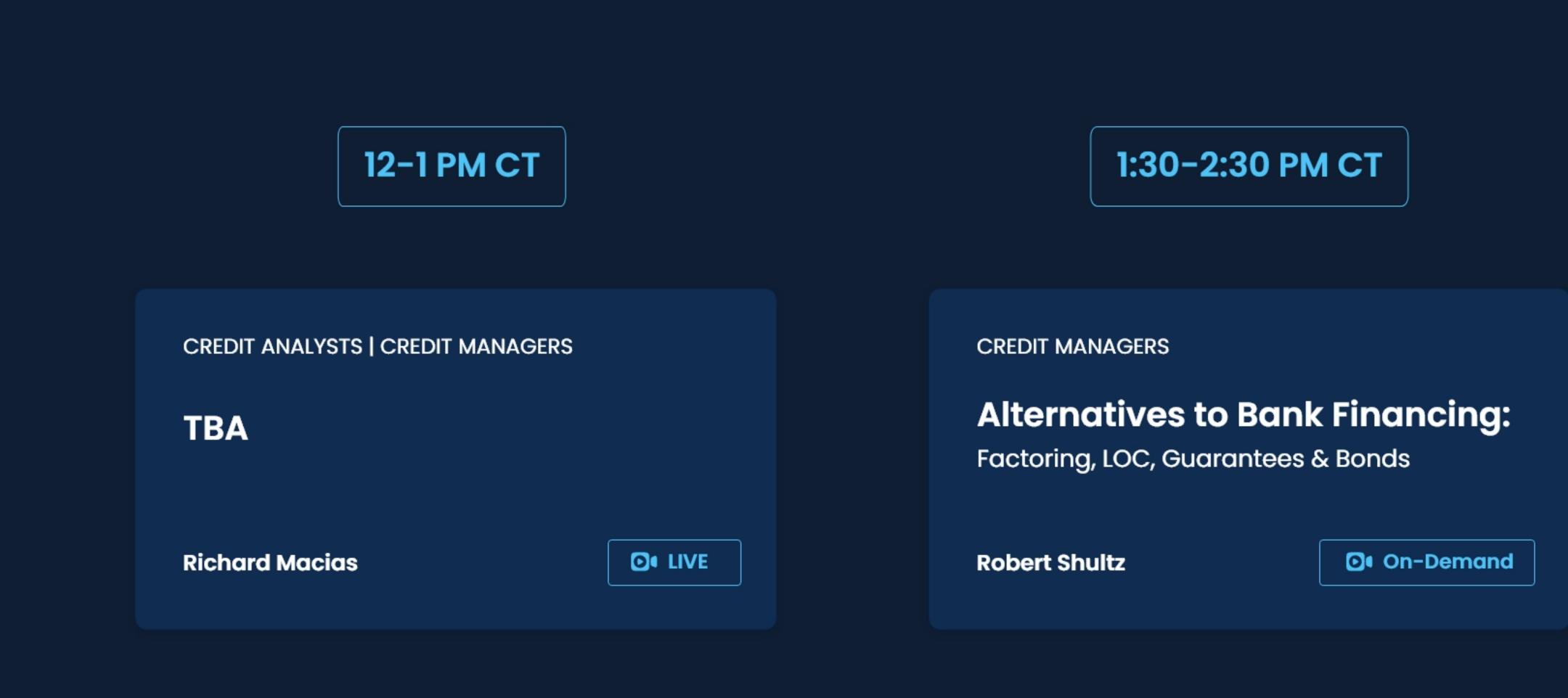
Tuesday | July 13, 2021



Wednesday | July 14, 2021









Monday | July 19, 2021

12-2 PM CT



Tuesday | July 20, 2021

12-2 PM CT



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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

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