

Credit Executive Symposium is personalized for you.

Gather with senior-level credit executives like you for a full day roundtable facilitated by 30-year credit veteran Robert Shultz. Discuss high-level business issues and trends with your peers in many industries, compare best practices, and get tips on valuable resources to help you improve your credit operations.

The agenda is built from advance input from all participants so the issues are timely and relevant to all attending. Engage through round-table discussion, thought-provoking breakout sessions, and guest presenters.

Past discussions have included collections, supply chain risk, shared services centers, international risk mitigation, performance metrics, hiring & retaining staff, fraud, and cyber security (see 2016 topics on next page).

Robert (Bob) Shultz — Facilitator

A managing partner at Cutting Edge Business Resources & Solutions (CEBRS), Bob will incorporate trending issues with topic requests from attendees to challenge the group in an intimate, dynamic think-tank environment that is heavy on interaction, low on PowerPoints. You will explore questions that matter most in your career and to your organization in roundtable discussions with seasoned credit peers from many industries. For more information about Bob, click on [Bob's LinkedIn Profile](#).



Event Information

Date: April 11, 2017

Time: 9:00 am - 5:00 pm Symposium
6:00 pm - 9:00 pm Networking Dinner

Location: Hyatt Regency Orange County
11999 Harbor Blvd, Garden Grove, CA 92840

Hotel: \$159/night
Reserve your room by March 21, 2017
Call: (714) 750-1234
Group Code: CMA

Entry fee: \$495 per attendee

Register: Space is limited to 20 participants
Contact Mike Mitchell
818-972-5340 or mmitchell@emailcma.org

CES is being offered in conjunction with CMA's CreditScape Spring Summit, which takes place at the same hotel on April 12. CES attendees are entitled to a \$100 discount on separate registration to the CreditScape Spring Summit. Visit www.CreditScapeConference.com.



CES Spring 2016 Topics

- **Credit Evaluation Resources**

What metrics are being used to evaluate a customer's financials?

What are the best credit information products for domestic and international accounts?

How to convince management that credit groups are worth the money and time out of the office?
- **Credit Cards and Other Forms of Payment**

How is your company reacting to increasing credit card fees?

Is anyone charging a credit card surcharge fee?
- **Credit and Collection Management**

How can the credit department provide unique value compared to competitors?

Can credit be combined with collections and customer service under one manager?

How can I better manage my time?
- **Technology and the Credit and Collections Department**

How are technology initiatives prioritized? By ROI?

Lessons learned from ERP conversions?

Experiences with electronic document management?
- **Mergers and Acquisitions**

How best to handle different cultures, additional workloads without adequate staff, different systems?
- **Change Management**

How to use "lean thinking" to maximize efficiencies?

How to overcome staff resistance to change?
- **The Role of Credit Management in the Cash-to-Cash Cycle**

CES Fall 2016 Topics

- **Managing and Reporting**

How do you manage your manager?

What does the Credit Manager need to know about Supply Chain Financing?

Other than DSO, what ROI metrics do you use to measure productivity?

Are there regulatory influences/changes that have impacted your business?
- **Credit Scoring**

Who is using scorecards and what elements do you use—financial and non-financial?

How do you weight the various elements?
- **Credit Analysis**

Are financial statements required in your business?

What if you receive unaudited vs. GAAP figures?

Any suggestions for good software?
- **Collections**

If you outsource collections, how do you strategize use of staffing? Manage from a distance?

How do you handle push back on terms?

Do you automate your cash application process?

How do you manage disputes?
- **International**

Bank payment obligations vs. Letters of Credit?

Who is successfully using credit insurance?

How to control international credit terms?
- **Personnel**

Recruiting, retention, training options

Succession planning

Managing relationship between credit and sales