

In conjunction with the CRF August 10 – 12 Forum in Chicago, IL at the Embassy Suites – Downtown Lakefront

CRF is presenting a separate 1 day workshop August 11

Managing Customer Deductions - Take Control of Deductions

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In celebration of our 60th Anniversary, join us Monday evening, 5:30 to 9:00 pm for a fun-filled evening of entertainment aboard the Spirit of Chicago for a **DINNER** cruise and **CASINO** night.



Who Should Attend his Workshop?

This workshop is designed for managers and personnel who work on the reconciliation, chargeback creation, collection, and negotiation of customer deductions.

The Credit Research Foundation is pleased to present this *"can't miss"* workshop on deduction management strategies and best practices in association with well known deductions experts, **Jessica Butler** of **Attain Consulting Group** and **Ken Green** and **Kathy Rotondo** of **IAB Solutions**. This interactive workshop will provide attendees with practical tips and advice in the following areas:

- Deduction Fundamentals
- Secrets to Managing Post Audit Deductions
- Negotiation Tips & Strategies
- Successful Customer Settlement Strategies
- Building Effective Cross-Functional Teams
- Outsourcing Deductions for the Right Reasons
- Deduction Benchmarks – Results of the brand new CRF 2009 Customer Deduction Survey

Take Control of Deductions

The Credit Research Foundation in collaboration with Attain Consulting Group and IAB Solutions is pleased to offer this one-day workshop on Managing Customer Deduction to help companies Increase Profitability by Reducing & Controlling Customer Deductions.

This interactive program is designed to provide attendees with tips, strategies, insights and best practices in many areas of deduction management so that they can raise the level of deduction management within their company, and improve trading partner relationships.

The following provides a brief overview of the deduction topics which will be addressed during the workshop. To provide individual attendees with as much value as possible, there will be numerous opportunities during the workshop for attendees to discuss specific deduction issues and challenges facing their organization

To register for this Deductions Workshop, Click here.

Workshop Outline:

Deduction Fundamentals

- The difference between chargebacks & deductions
- Different types of deductions
- Overview of the deduction process
- Best practice snapshots
- Keys to deduction management success
- Enabling technologies to manage deductions

Successful Customer Settlement Strategies

- Different types of settlements
- The 7 steps to successful settlements
- Tips & strategies for each step in the settlement process
- Relevant case studies

The Secrets to Managing Post Audit Deductions

- Defining Post Audits
- Post Audit dilemmas
- A “How to” guide for responding to Post Audits
- Proactive solutions for prevention
- Post Audit recoveries, sharing successes.

Negotiation Tips & Strategies

- Negotiation as joint problem solving
- Negotiation checklists
- Nonverbal communication
- Words to use and words to avoid
- Open & closed ended questions
- What to do when people say “no”

Building Effective Cross Functional Teams

- Structuring cross-functional teams to manage deductions
- Common challenges in cross-functional success
- 4 critical components of successful cross-functional teams
- Template to use for your teams

Deduction Benchmarks – Results of the 2009 CRF Customer Deduction Survey

- Summary of responding companies – over 720 companies across 33 different industries
- Deduction metrics
- Deduction processes
- Deduction policies
- Actions taken by companies to prevent/recover deductions

Outsourcing Deductions for the right reasons

- Reallocate resources to maximize results and increase productivity, not payroll dollars
- Supplement your staff with analysts paid only on success
- Take advantage of a trained and managed staff of experts
- Nothing needs to be put on the back-burner, all issues can be addressed
- Have time to be proactive and address root causes

Your Workshop Leaders:

Jessica Butler, Principal, Attain Consulting Group

Jessica Butler is the founder of Attain Consulting Group, a deduction and chargeback management advisory firm. Creating Attain in 2004 after discovering her passion and talent for helping companies reduce chargebacks & deductions, Attain provides practical, experience-based solutions to companies looking to minimize dilution due to compliance violations and at the same time, work towards improving trading partner relationships. Helping companies "*Take Control of Deductions*", Attain Consulting Group offers a wide variety of services covering all areas of the deduction management process.

Jessica recently started providing online deduction education through *Attain Academy*, an innovative web-based learning tool providing companies with the knowledge and training they need to take control of deductions. Known throughout the industry as an expert and thought leader in the area of deduction management as well as negotiation, Jessica is frequently published and is a highly sought after speaker at conferences and seminars

A former partner with the International Accounting & Management Advisory firm of Grant Thornton, LLP, Jessica has over 223 years of consulting experience and has dedicated most of the past decade focusing exclusively in the area of deduction and chargeback management. Jessica is a CPA and received her MBA from New York University.

Jessica can be reached at (201) 280-4773 or jbutler@attainconsultinggroup.com.

Kenneth E. Green, President, IAB Solutions LLC

Kenneth E. Green has been President of IAB Solutions LLC for the past fifteen years. Previous to this, he gained extensive experience in sales promotion, vendor relations, merchandising and all aspects of finance and control both for small and large national retailer chains and manufacturers. He has presented at many national, state and local credit and customer financial service organizations specifically on the subject of accounts receivable outsourcing, deduction resolution best practices, and chargeback recovery. He has been named as one of the fifty most influential people in the credit industry by Credit Today.

His educational background includes an undergraduate degree from the University of Pennsylvania and a Masters in Business Administration from Columbia University, with additional graduate credits from Hofstra University. He plays an active role in local and national credit and customer financial service organizations, as well as with local community organizations. Ken is located at IAB's corporate offices in Clarks Summit, Pennsylvania.

Ken can be reached at (570) 585-5202 or kgreen@iabinc.com.

Kathy Rotondo, Sr. Vice President – Operations & Sales

Since joining IAB Solutions LLC in 1988, Kathy has held a wide range of field and corporate management positions enhanced by her retail and credit background. In 1992 she was promoted to Regional VP and was recently promoted to her current position focusing on new business opportunities. Kathy utilizes her extensive knowledge of accounts receivable best practices, ERP systems, deduction management, resolution and recovery and has been instrumental in building long standing client relationships. She is committed to high ethical standards and takes great pride in partnering with clients to achieve maximum results.

Kathy can be reached at 570-585-5240 or krotondo@iabinc.com.