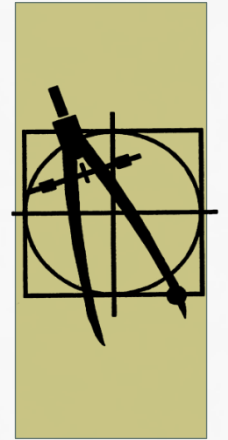


CREDIT RESEARCH FOUNDATION

OPEN FORUM



October 23, 2024
National Harbor, MD

OPEN FORUM GUIDELINES

- The Open Forum discussion is a unique opportunity to learn and help your colleagues by sharing your knowledge.
- CRF has a number of vendor members and the input to the conversation by both practitioners and vendors alike is encouraged so that everyone's input and knowledge can add value to the discussion.
- We do however request that vendors not promote their products during the general discussion in fairness to all in attendance, but rather carefully construct their input so that their knowledge and experience can be used for the benefit of everyone.

OPEN FORUM PROTOCOL

- Please wait for a microphone
- Identify yourself and your company affiliation

LISA BURNS

KOCH ENGINEERED SOLUTIONS

If segmenting your customer portfolio across a team of analysts based on product line, what are best practices/tips for those analysts as they manage customers that cross into other product lines/analyst's portfolios?

BOB ANDERSON

HUBBELL INC

When your company acquires another company, are you involved:

- During due diligence
- At close
- At a point afterwards
- How (if at all) do you merge credit practices, including credit reviews & credit policy

ALEXANDRA DIAZ JOHNSON TROPICANA BRANDS GROUP

Can the group help with:

- DSO improvement,
- Preventing fraud,
- Past due and bad debt mitigation

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- Given inflationary pressures, top line sales/profits continue to decrease, and companies are reeling in decreasing discretionary spending. What are some of the strategies you can share to get approval to come to CRF events?
- With the increase in the number of bankruptcies, including Subchapter 5, what is the best way to educate my team, many with no experience in bankruptcies, on what to do when an account files?
- We heard a lot about AI from the forum and our fintech partners. Can anyone share some recent use cases you've implemented using AI. Was there an ROI - and what were the watchouts and what would you have done differently?

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As we approach the New Year what are your top priorities as a Credit Executive:

- People
- Process
- Technology
- Strategy

Have your budgets:

- Increased
- Decreased
- Stayed the Same

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What are the subjects/topics that you would like to see delivered from CRF in 2025?

THE END OF SUBMITTED TOPICS

Questions From the
Group

Thank you all...

HAPPY THANKSGIVING



HAPPY HOLIDAYS



HAPPY NEW YEAR



Remember...

Share Your Toys!!!