

# Excellence



April 09

A newsletter for the members of Intermountain Credit Education League (ICEL)

Thursday  
April 9  
Red Lion  
Hotel  
11:45-1:15

**ANNUAL  
BUSINESS  
MEETING AND  
ELECTION OF  
OFFICERS**

## Learning New Skills

President, Janae Jeffs, CCE, Muir Roberts Enterprises

Sometimes life comes at you fast. As my tenure as your ICEL President comes to a close, a new opportunity has come my way. Because I have been an active member of ICEL and NACM, I have the skills I need to perform in my new position. A series of unfortunate events happened at my company. Within a week I became a supervisor. A problem arose in the customer service department and because part of the problem involved cash receipts, I became involved. I felt the best solution to the problem was to do some additional training on cash receipts within the customer service department. One thing led to another and when the dust cleared, I found myself with an assistant. I had never supervised anyone, and I was excited about this new opportunity. Because of the leadership skills learned by being the ICEL President, I felt ready for this new challenge.

NACM and ICEL are such wonderful places to learn and grow. I feel so fortunate to be part of these great organizations. Did I know that such an opportunity would happen at my workplace? No! I never thought I would have my own department. Our company is very lean. All of the accounting personal handle multiple tasks and duties. But, because I had been involved with ICEL, I learned the skills needed to handle this unexpected responsibility. By actively participating in all of the meetings at ICEL, I learned new ways to analyze, to collect receivables and to reduce my DSO. By being on the ICEL board and chairing the Program Committee, I learned how to organize meaningful meetings and how to find and retain speakers. As president, I have acquired people skills, problem solving skills, conflict resolution skills, and public speaking skills. I have learned to get out of my comfort zone, to have the confidence to conduct monthly meetings and to think on my feet when unexpected problems arise.

By obtaining my CCE, I feel I am qualified to train my new assistant in the field of credit even though this person has never had an accounting or credit experience in her life.

NACM and ICEL will always be there to provide training, skills and opportunities for growth. I thank each of you for the valuable lessons I have learned this year. I hope you will get your professional designations, volunteer for a committee or run for the ICEL board. You never know when the skills you may learn will be put to the test!

Thank you for your support this year as your president. I am saddened that I will no longer be at the helm, but I know that ICEL will be in good hands with our new President, Erin Doll. I look forward to my continued association with the best people in the entire world—ICEL members!

## Annual Business Meeting and Election Of Officers

April 9, Red Lion Hotel, 11:45 - 1:15

Make sure that you plan on attending this important meeting. Your vote will determine the direction of ICEL for several years. Talk to the individuals running for the Board. If you have some ideas for speakers or suggestions that will help ICEL improve, let them know. Get involved.

There will be a recap of yearly events and a big round of applause for the President and Board of Directors who have so diligently served ICEL this past year.

## 2009-2010

### Board of Director Nominees

Lana Harris - Burton Lumber  
Shanna Sorge, CBA - Easton Hoyt  
Melissa Mickelsen - Geneva Rock Products  
Krista Miller - Intermountain Electric  
Falelua Lealaitafea - Kenworth Sales  
Kim Pool - Steelco  
Whitney Davidson - Sunroc

## ICEL Board of Director Nominees

### **Lana Harris**

#### **Burton Lumber and Hardware**



Lana has been the corporate credit manager of Burton Lumber and Hardware since 2001. She has also been a co-owner of a trucking company, worked as a credit manager for Marsyl Enterprises, Holley Carburetor, and Sutherland Landscaping before moving to Burton Lumber.

Lana has been very active in industry credit groups including Ogden Contractors (co-chair), Utah County Contractors, Southern Utah Contractors, and is currently serving as the chairman of the Salt Lake Contractors.

She has served on the NACM Scholarship Committee, has been a member of ICEL for the past 7 years and has attended both Regional Credit Conference and National Credit Congress.

She graduated from high school with honors from the National Honor Society. She also served as an officer for the Future Business Leaders of America.

Lana spends a lot of time with her family and serves in her church where she is presently directing the choir every Sunday.

Lana is honored to have been nominated for the Board of Directors. She would like to serve and give back to the organization that has encouraged her to continue her education. She has 23 years in the credit field and feels she would bring a wealth of knowledge with her. She is very organized, a workaholic, and has energy and desire to serve if elected.

### **Shanna Sorge, CBA**

#### **Easton Hoyt**



Shanna Sorge is a credit manager for Easton Technical Products. Her educational background began by taking general study courses right out of high school. She soon realized that she wanted to be a credit manager and started taking credit classes in preparation for the designation exams. She passed the CBA exam in July '07 and just took the CBF exam March, 2009.

Shanna began working at Swire Coca-Cola in 2000 where she learned AR, credit, and later became a trainer. In July, 2006, she left Coca-Cola to start at Hoyt USA as a collector. Shanna transferred to a sister company, Easton Technical Products, to manage AR and collections and is now the credit manager. Shanna currently belongs to ICEL and is on the NACM Education Committee.

Shanna wants to run for the ICEL Board because education has proven to be a great asset for her and she wants to share the value of education with others.

**Melissa Mickelsen**  
**Geneva Rock Products**



Melissa Mickelsen works as an assistant credit manager for Geneva Rock Products. She graduated from BYU in 2000 with a B. S. Degree in horticulture. After graduation she moved to Indianapolis where she completed an internship working in the gardens at the Indianapolis Museum of Art. After two years in Indiana, she moved back to Utah and was hired by Geneva Rock. She worked for a brief time in their accounts receivable department, worked for five years as a credit assistant, and in February of 2008, was promoted to assistant credit manager.

Melissa is currently serving on NACM's Education Committee and has been an active participant in NACM and ICEL. She is a member of the Salt Lake Contractors Group as well as the Concrete and Paving Group. Melissa has been taking the courses needed to sit for the CBA exam and hopes to achieve it this year.

She is the proud aunt of a niece and nephew and loves to spoil them rotten. She also loves to read and enjoys traveling.

Melissa has really enjoyed being a part of ICEL. She enjoys attending the meetings each month as well as getting to know other credit professionals in the area. She would appreciate the opportunity to give back to ICEL by serving on the board.

**Krista Miller**  
**Intermountain Electric**



Krista began working for Intermountain Electric as their receptionist in 1998 when she was 19. After being their receptionist for 5 years, a position became available in the accounts receivable/credit department. Shortly after getting comfortable in the credit department, she also took over accounts payable. Her organizational skills have helped her manage these responsibilities.

She has been a member of ICEL for 3 years. Krista is a member of the Diesel Engine Industry Credit Group and has served as their chairman for 2 of the 6 years that she has attended. She is also currently serving on the Entertainment Committee for NACM.

Krista has successfully completed all of the required classes to become a CBA and just recently sat for the CBA exam.

She has enjoyed meeting new people through ICEL and making new friends through her credit journey. Her hobbies include stamping, cooking, music, decorating, watching movies and hanging out with friends.

**Falelua Lealaitafea**  
**Kenworth Sales**



Falelua has worked for Kenworth Sales in their credit and collections department since 2007.

She has completed the Principals of Business Credit & Accounting 101. Falelua has enjoyed her membership in ICEL and helps out whenever possible.

She has served on the Entertainment Committee and was NACM's 2008 Student of the Year. She also was the recipient of the Lien Counsel Cache Scholarship in 2007.

She has many hobbies, but scrap booking is her favorite. She has used these skills to help put together ICEL's annual history book.

**Kim Pool**  
**Steelco**



Kim is a proud member of NACM and ICEL. She is a regular attendee of seminars and classes given by them. She is excited and honored to be nominated to serve on the Board of Directors of this great organization.

Kim graduated with honors from East High and was a men's department store manager at the Brickyard Plaza in Salt Lake City. In 1994 she decided to take a break from the retail world and entered the exciting and fulfilling world of a kindergarten teacher for a private school.

She has worked at Steelco for 12 years, starting as a receptionist, then changed to sales and finally became the credit and accounts receivable manager which she loves.

She feels her unique skills would be an asset to the ICEL Board!

**Whitney Davidson**  
**Sunroc Corp.**



Whitney Davidson works for Sunroc Corp as their Northern group credit manager. She obtained her Associates Degree from Mt. Hood Community College. She is also working on her professional designation through NACM and has completed all of the class work to sit for the CBA exam.

Whitney has been in credit full time since 1996 when she started to work for Altres Financial & Staffing. She worked for Xpedx, Roofers Supply and now working for Sunroc.

Whitney has been an ICEL and NACM member for approximately 12 years. She has been a member of the following Industry Credit Groups: Fine Paper, Contractors, Roofing Supply & General Service.

Whitney was the Employee of the Year in 1999 while working for Altres Staffing. She thoroughly enjoys being a credit manager, wife, mother & grandmother, Whitney is looking forward to many more years as a credit manager and continuing her relationship with NACM and ICEL members.

When asked why she wanted to run for the ICEL Board she responded: "To be able to sit on the ICEL Board and work closely with other members who value credit education would be exciting."

# March ICEL Bosses Luncheon Re-cap

by Erin Doll, CBA, Mountain Contractors Supply Group

This month was our annual Bosses Luncheon. Members brought their bosses with them for a special presentation designed to reinforce why we, the credit department, and ICEL are important to the financial well-being of our companies.

Susan Lujan, CCE, of Kenworth Sales Co., gave a phenomenal presentation. She discussed the current economic crisis and how now more than ever, the credit department can make or break a company. Before the economic crisis, we all competed for our piece of the money pie of our customers. Now that pie has shrunk, but none of us want to give up the portion we had before. The way to keep your piece from shrinking or going away altogether is to change. You can't win based on product alone. There will always be competitors. You can't win on price alone. Your competition can and will cut prices. You have to set yourself apart. This is where the credit department plays a crucial role.

The credit department **IS** customer service. The credit department is also your best salesman. Why is this? Everyone says credit doesn't sell anything, but actually they do. They sell the company and they sell the reason your company should be paid first instead of another company. It is all about relationships and customer service. The credit department has to change tactics with the changing economy and to put on a sales hat. Instead of playing hardball (sending accounts to collections or the attorney, etc.) the credit department needs to foster lasting relationships with customers to show them that your company wants to continue doing business with them, understands the customer's position, and is willing to HELP them.

Your customer knows they are in financial trouble. The last thing they want is another call hounding them for money they may not have. Imagine the surprise if they get a call from your credit department asking how they can help. This may mean accepting payments over a period of time. This may mean offering customers the opportunity to pay in other ways, like with trust deed notes. It may mean sending your customers to the Collection Training Workshop NACM is putting on April 7th to help strengthen their collection skills.

Your credit department needs to be educated, trained and to have the right personality fit in order to be successful. ICEL meetings, continuing education, and professional designations are all very important components in strengthening your credit department. In the big picture your credit department is not a cost center. It is an asset that can help your company not only weather this economic storm, but quite possibly may enable your company to come through it in a much stronger position.

## Are Your Customers Collecting?

(So You Get Paid!)

### NACM Training Can Help!

Only \$15 For A 2 Hour Workshop (regular price \$65)

**Learn  
Assertive  
Communication  
Skills**

**Tuesday, April 7**

**Create  
Positive  
Outcomes**

Three sessions to select from: 8:30-10:30, 11:30-1:30, 2:30-4:30  
NACM Training Center: 7410 So. Creek Rd., (1130 East) Sandy, UT

**NACM Customer Training Testimonial from Penny Williams, Midwest Floor Coverings. #1183**

"Some years ago, at our request, NACM's Dean Wangsgard, CCE, put on a Credit & Collections Training Seminar for our customers who were having a difficult time collecting. THE RESPONSE WAS INCREDIBLE! We had over 100 of our customers in attendance.

It was a win win situation for us and our customers. They learned valuable credit and collection tools and we were able to get paid faster. Midwest also experienced some great PR from this event. I recommend this training service for all NACM members whose customers are having difficulty collecting."

"My customers  
learned valuable  
collection tools and  
we got paid faster!"  
Penny Williams

**Overcome  
Excuses &  
Defuse  
Confrontation**

**Creating customer loyalty  
and gratitude may help  
you get paid faster!**

**Explore All  
Avenues of  
Payment**

To Make Reservations: Contact Julia at 801-487-8781, ext. 119 or email [jbuck@nacmint.com](mailto:jbuck@nacmint.com)

*She will save seats for your customers—they decide the session*

*We will bill your company \$15/attendee—your company pays or you collect from your customers*

Grab your shorts, flowered shirts, beach bag and shades and head for the

# NACM Spring Break Beach Bash

## April 24, 2009

The Gathering Place at Gardner Village  
\$50.00

Menu selections – Prime Rib, Salmon, Chicken Florentine  
Donations: (A good place for those few left over logo items)

Limbo contest  
Prizes

# BANKRUPTCY

My Customer Filed BANKRUPTCY, What do I do Now?

Speaker: Scott W. Lee, JD, CCE

This Credit Clinic Will Help You Understand:

- Reclamation
- Automatic Stay
- Preferences
- Stoppage of Goods in Transit
- Proofs of Claim
- Creditors' Committees
- Doing Business with a Debtor-in-Possession
- Liquidation v. Reorganization
- The Reorganization Plan
- Essential/Critical Vendors and the Doctrine of Necessity

Thursday, April 16, 2009

8:30 am to 10:00 am

Cost: \$25

NACM Training Center, 7410 S Creek Rd, #301, Sandy, UT

Reservations: Contact Georgette Bevan at 801-433-6116



## 2008-2009 ICEL Board of Directors

### President

Janae Jeffs, CCE  
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### Vice-President

Erin Doll, CBA  
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### Secretary & Membership

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