

NACM HEARTLAND STRATEGIC PLAN

ANALYZING THE SITUATION – STRATEGIES – OBJECTIVES (S-S-O)

Dear NACM Heartland members,

While we typically create an annual report in the fall newsletter, this year we want to demonstrate what the NACM Heartland board of directors is planning for the future.

To ensure we are providing the best value for our membership, we have been actively engaged in developing a strategic plan for FYE 2017.

The objectives defined in the strategic plan (detailed on page 2) are expected to go into effect during FY 2017. As you review the information, you will see how the board went through the process. So we may be held accountable, we plan to provide updates periodically in our newsletters and the monthly email updates.

If something is unclear, or if you have feedback, please don't hesitate to contact me or Maggie Bessenbacher.

Ty Knox

NACM Heartland Board Member
Director of Credit & Risk | EFCO Corp.
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N A C M
HEARTLAND

National Association of Credit Management

SITUATION ANALYSIS

The NACM Heartland Board of Directors serves the NACM Heartland Unit Inc. under the supervision of Bill Croyle, COO. The current Board is made up of the following 11 members:

- Carroll Anderson, CE Investment
- Mark Bluml, West Central Coop
- Joel Halverson, 3E
- Ty Knox, EFCO Corp.
- Jennifer Leachman, Leachman Lumber
- Randy Bures, Helena Chemical
- Kevin Quinn, Key Cooperative
- Amanda Ravenscraft, Lansing Trade Group
- Jean Snyder, Crop Production Services
- Steve Stahl, Great Western Bank
- Rod Strom, Hawkeye Gold, LLC

The 11 board members are divided into three committees (Education, Member Services and Marketing) to better serve the organization.

EDUCATION

- Ty Knox
- Rod Strom
- Jennifer Leachman

MEMBER SERVICES

- Mark Bluml
- Joel Halverson
- Kevin Quinn
- Jean Snyder

MARKETING

- Carroll Anderson
- Steve Stahl
- Randy Bures
- Amanda Ravenscraft

SITUATION ANALYSIS

For several years, NACM Heartland has been in a growth mode. This is not common for every NACM chapter. In fact, during this year's recognition of NACM chapters that exhibited member growth, there were only two other associations included. As of September 2016, we had more than 125 member organizations and seven members who had achieved their professional designation in the past year.

We run a lean balance sheet to keep our association dues reasonable. Our operating budget for FY17 includes monies for marketing, new member outreach, educational events such as Lunch and Learns and our annual meeting. We also set aside budget items for networking, which we view as important as education because in its own way, it is a way to learn more.

STRATEGIES

To run an effective organization, NACM Heartland maintains a Des Moines-based board of Directors with an association management company based in Kansas City handling the day-to-day operations. We employ the following strategies to achieve our objectives:

- Credit Exchange Groups
- Collections
- Education
- Credit Reports
- Networking
- Risk Management Resources

OBJECTIVES

Throughout FY17, the NACM Heartland board and staff will

- Be a thriving, dynamic organization whose membership is committed to professional excellence in business credit and financial management.
- Encourage the honest, ethical, unrestricted exchange of historical and factual credit information. Business credit information will be true, unrestrained and maintained by all credit professionals in an environment of confidentiality.
- Advocate sound business credit practices.

In addition we will work to ensure:

- The credit profession will be an integral part of business management and recognized as vital to the free enterprise system.
- Credit education will be available to the business credit community.
- NACM Heartland will organize and govern the association knowledgeably, openly and responsibly.

COMMITTEE "BIG ROCKS" FOR FYE 2017

To achieve our stated objectives, the NACM Heartland board of directors has identified "BIG ROCKS" for each of its three subcommittees. These "BIG ROCKS" are the objectives each of the committees has set out to achieve throughout the course of FY17. All of these "BIG ROCKS" are measurable goals to make it easier to evaluate the progress of these objectives throughout the year.

EDUCATION COMMITTEE

- Design and implement Credit 101
- Identify and procure a keynote speaker for FYE 2017

MEMBER DEVELOPMENT COMMITTEE

- Create a communication value to the members of Heartland through advertisement in trade magazines, websites and blogs
- Growing our membership by 10% through recruitment by engaging the assistance of the board and current members
- Increasing engagement of the members by continuing to offer the tools necessary to run an effective credit department, as well as implementing new ones.

MEMBER SERVICES COMMITTEE

- Identify two new industry credit groups or subgroups NACM Heartland can effectively develop and service.
- Provide value driven services. This includes:
 - > Leading Edge Data Sharing - ICE system
 - Goal: Collaborate on ICE developments to insure system remains best in class
 - Goal: Increase ICE participation by X% based on current participation of X%
 - > Collection Services - BARR
 - Goal: Develop endorsement
 - > Vendor Partnerships - UTA, Credit One Source
 - Goal: Identify additional value driven vendor partnerships
 - Goal: Promote expanded use of existing partnerships. Possible discount to members
- Develop direct member communication between NACM Heartland members and the board as a means of cultivating new ideas, address issues, and enhance service