

National Promotional Products Credit Group

Come Prepared!

Keeping in mind that we will discuss **factual and historical information**, the following are ideas to help you determine what information to bring along to help facilitate group discussion.

- ✓ **Credit & Collection Notes**
 - key contacts & phone numbers
 - key information
 - company history
 - background
 - general operation info
 - recent special events
- ✓ **Credit Reports**
- ✓ **Financial Statements**
 - Current? If not current, provide date they were requested.
 - How was it received (mail, visit, etc.)?
 - Was the statement received in confidence?
 - Audited or not?
 - Any footnotes?
- ✓ **Trends and key changes in business and/or management**
 - Letters, emails, newspaper & magazine articles
- ✓ **Do you have any security / guaranty / notes?**
- ✓ **Have you made any customer visits?**
 - Date and any notes
- ✓ **Payment Changes or updates since you submitted your meeting experience**

Overall, plan to discuss trends, recent problems, changes both positive & negative, and explanations for any the recent trending.

Under **NO** circumstances are you to let the customer or sales staff, know what accounts will be discussed at the credit meeting. Any information received at the meeting **CANNOT** be shared with the customer or the sales staff.

SEE YOU AT THE MEETING!