AFP®
Annual Conference

Association for Financial Professionals®

OCTOBER 27–30, 2013 | LAS VEGAS

ORIGINAL→ESSENTIAL→UNBIASED→INFORMATION

Celebrity Treasurers: Why You Should Become the Go-To Expert in Your Field

Ira Apfel
Editorial Manager
AFP

Sassan Parandeh, CTP
Global Treasurer
ChildFund International

Laurel Egan Kenny
President & CEO
Turningpoint Communications
COO, South Shore Chamber of Commerce
President, TMANE

Writing & Speaking

What I Need to Read

EURO

FASB 133

Patriot Act

FBAR

SWIFT

SOX

EBAM

What I like to read

“Aha Moments”

Source: http://bit.ly/17NtNfK

“Aha Moments”

Out of Africa Cover: Courtesy of Universal Pictures
Source of Karen Blitzen photo: http://binged.it/17NtnpO

Why do it?

Why do it?

BHOLA'S
Digital & Color Lab
Sundays Open
FOREIGN EXCHANGE
APPROVED BY R.B.I
FOREIGN EXCHANGE
APPROVED BY RESERVE BANK OF INDIA
RAJ OPTICIANS
MONEY CHANGER
RAJ OPTICIANS
FOREIGN FXCHANGE
WE ACCEPT ALL MAJOR
CURRENCIES & TRAVELER'S CHEQUES
G.M.JEWELLERY
FOREIGN EXCHANGE
FOREIGN EXCHANGE
(AUTHORISED MONEY CHANGERS)
WE ACCEPT ALL MAJOR
CURRENCIES & TRAVELER'S CHEQUES
WE OFFER BEST RATES
G.M.JEWELLERY
FOREIGN EXCHANGE

When you start looking for stories they come looking for you

KCB Making the Difference

ART CAFFE
WESTGATE
P.O BOX 14510-00800
NAIROBI. KENYA

TERMINAL ID. : 80001774
MERCHANT ID : 000000002238001

PURCHASE
VISA (C) EXP 09/15
4024 51** **** 6907
PARANDEH/SASSAN
BATCH: 139 SEQ.NO : 916
DATE : 18/09/13 TIME : 06:16:56
INVOICE: 601
AUTH NO: 023561

AMOUNT KES 360.00

VISA 360.00

Subtotal 360.00
Payment 360.00

VAT 48.81
CTL 6.11
-----163 Check Closed 18:12-----

THANK YOU AND PLEASE COME AGAIN
PRICES INCLUSIVE OF ALLTAXES
735730F9B4FA5221F609
493AE98D42710E1467A1
0565 01149556 13091
81709 AWQ06001355

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MERCHANT ID : 000000002238001

PURCHASE
VISA (C) EXP 09/15
4024 51** **** 6907
PARANDEH/SASSAN
BATCH: 138 SEQ.NO : 906
DATE : 17/09/13 TIME : 06:04:26
INVOICE: 593
AUTH NO: 043238

AMOUNT KES 360.00

PLEASE DEBIT THE ABOVE
AMOUNT FROM MY ACCOUNT

***** THANK YOU *****
**** PLEASE COME AGAIN ****
< CUSTOMER COPY >

48.81
CTL 6.11
-----112 Check Closed 17:59-----

THANK YOU AND PLEASE COME AGAIN
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71656 AWQ06001355

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NAIROBI. KENYA

TERMINAL ID. : 80001774
MERCHANT ID : 000000002238001

PURCHASE
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4147 40** **** 9687
PARANDEH/SASSAN
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DATE : 16/09/13 TIME : 05:54:25
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AUTH NO: 04088C

AMOUNT KES 570.00

PLEASE DEBIT THE ABOVE
AMOUNT FROM MY ACCOUNT

***** THANK YOU *****
**** PLEASE COME AGAIN ****
< CUSTOMER COPY >

VAT 77.28
CTL 9.67
-----112 Check Closed 17:49-----

THANK YOU AND PLEASE COME AGAIN
PRICES INCLUSIVE OF ALLTAXES
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C382562598423ED280C7
0492 01148054 13091
61646 AWQ06001355

- How to find time for writing?
- How to leverage it professionally
- What bosses & peers think?

Thought Leadership is NOT!

- An advertorial or sales pitch
- Brand specific information
- Position or management role

Our Thought Leadership Definition

- Your expertise, presented or written for a specific audience
- Study and promotion of best practices
- Presentation of original ideas – a basis for change
- Credible and focused
- Changes how your audience views the topic… and you
- Can only be "granted" by those who you seek out

- Articulating your experiences in treasury and finance as original, innovative insights to further your profession, your employer and your career – Ira Apfel, AFP

TL for the Right Reasons

Who: Audience

What: Message

When: Schedule

Where: Medium

Why: Strategy

How: Implementation

What can it do for you?

- **Self Promotion**
  - Personal Brand
  - Professional Reputation
- **Marketing or as an alternative to SALES!**
- **Positioning as a trusted advisor / consultant**
- **Opportunities to simultaneously promote clients/vendors**
- **Supplemental Revenue**

Do you have the support you need?
Position TL as a win/win/win for your company/manager/you

Why Become a Thought Leader?

- **Become the "expert"**
- **Create change and improvement**
- **Spotlight your topic**
- **Focus on what you are passionate about**
- **Get promoted or add more value**
- **Get recognition from colleagues / managers**
- **Gain clients, market share**

Company

- Increase sales
- Brand Awareness
- Recognition
- Industry Standard
- Patents, Trademarks

Personal

- Education / Academia
  - Thesis, Dissertation, Degree, Professorship, Certification
- Name Recognition
- Awards, Honors
- Work-Life Balance

Career

- Go into Business/Consult
- Advancement: Job, Company
- Board Appointments
- Validation of knowledge
- Bonus / Perks
- Editorial Board

Multimedia Exposure

Print:

- **Newsletters**
- **Newspapers**
- **Periodicals**
  - Industry Pubs
  - Alumni Magazines
- **Byline articles**
- **Whitepapers**
- **Books / Manuals**

Events:

- Conferences
- Webinars
- Focus Groups

Electronic:

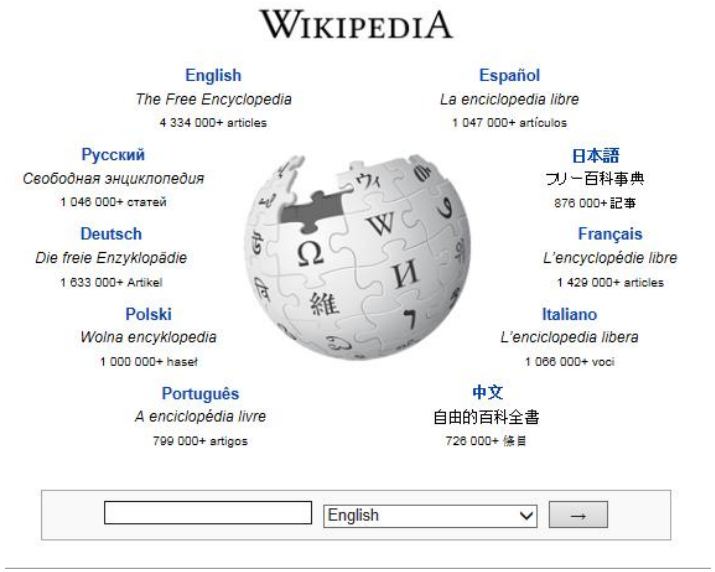
- eBooks
- Social Media

Communities:

- Industry Organizations / Boards
- Editorial Advisory Board
- Profnet
- Speakers' bureau

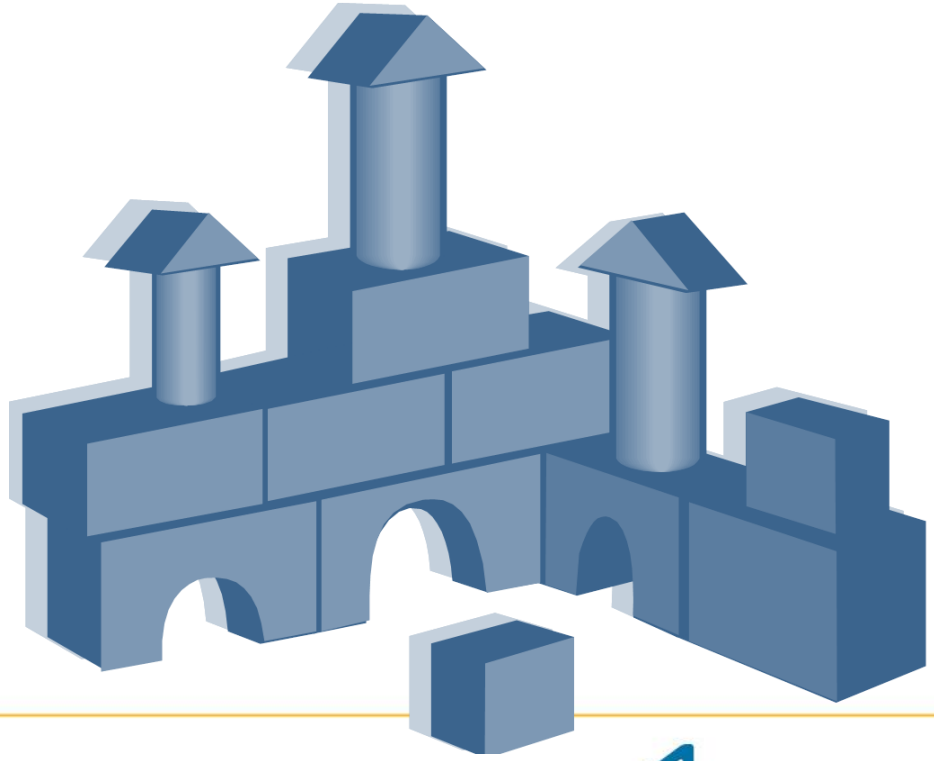
New Media Opportunities

- Blogs
- SlideShare
- FaceBook
- Twitter
- Google
- Yahoo
- eHow
- Wikipedia
- TravelAdvisor
- LinkedIn . . . .
- Vine/Video
- Apps



Where to Begin:
Tell A Story. A Success Story

- Situation
- Opportunity
- Achievement
- Result



Why Write?

"Writing challenges and focuses me to think about my business processes with more precision than if I just went to lunch and chatted with a colleague." – *Head of Financial and Business Analytics*

Why Write?

"Part of a talent management strategy:

- Writing about what we are doing allows us to network with treasury professionals and get feedback/ideas from other companies
- Building communication skills for the treasury team
- Retaining and acquiring talent: Visibility in the treasury community and positioning ourselves as thought leaders." – *Vice President and Treasurer, Fortune 500 Company*

Barriers to Entry

No Time

No Resources

No Outlet

No Skills

The Creative Process

Ideas (Case Study or Thought Leadership?)

Targets

Pitch

"Hello my name is Sassan Parandeh and I am treasurer of ChildFund International, a $350M organization with offices in 30 countries. I wanted to know if you'd be interested in publishing an article about verifying payments in developing nations. Many of your readers face this challenge and I could offer best practices and anecdotes."

The Production Process

Details

-Deadline? Length? Graphics?

Clearance!

-Management
-Corporate Communications
-Legal

The Writing Process

Tell a Story

Chronological

Just the Facts

Get it Down on Paper

Sidebar?

Headline

Get Feedback

The Editing Process

The Editing Process

No Supervendorman!

The Result

International MYSTERY

It was a huge check. But was it real?

Sassan Parandeh, CTP

As an international nongovernmental organization, or NGO, ChildFund International had for 75 years received generous gifts from sponsors and philanthropists and used them to improve the lives of impoverished children around the world. But, to its corporate treasury department, one particular donation looked very suspicious and was immediately tagged for careful monitoring.

Why the suspicion? Instead of a normal check or an international wire transfer, this donor had paid ChildFund International by cashier's check. Normally, patrons go out of their way to positively identify themselves and seek to save their endorsed check as proof of their tax exempt contribution. But, a cashier's check leaves no trace of the original donor, as it is issued by a third party bank, signed by a bank employee, and has a bank branch address on it.

Since the bank that issued the cashier's check was a national institution with which ChildFund International already had an existing relationship, staff contacted the issuing branch in Arizona to verify the cashier's check. Unfortunately, the bank agent insisted that due to privacy laws, he was unable to verify anything other than to indicate that the account was active. When asked to confirm the signatory name printed on the check, the banker vehemently declined. The banker noted an internal policy which prohibited their staff from disclosing signatory names and went on to stipulate that the only way ChildFund International could assure the cashier's check was authentic was to deposit it.

To the chagrin of ChildFund International's treasury staff, the bank's response was echoed by its local corporate bank relationship manager in Washington, DC. So, the cashier's check was forwarded to ChildFund International's lockbox for processing.

The plot thickens

The very next day ChildFund's vice president of marketing and fundraising received a call from the donor. The donor indicated that the $80,000 check was issued in error and that his true intent was to only pay ChildFund International $30,000. According to the caller, the excess $50,000 was supposed to have gone to an Asian heart institute. As such, the donor authorized ChildFund International to retain $30,000 but requested that the excess be transferred to his intended beneficiary. In return for ChildFund's immediate cooperation he promised progressively larger gifts in future years.

When this request was shared with ChildFund's treasury group the gravity of the situation was clear. We knew that the decision was risky regardless of our decision. If this donation was from a real billionaire and corporate treasury did not issue the refund immediately, ChildFund might lose all of his future support. Moreover, treasury would ravage the efforts of its client development officers who had obviously cultivated a viable relationship. Worst of all, treasury inaction could damage the reputation of ChildFund International.

Writing Tips for Non-Writers

Get an idea – successful project or accumulated wisdom

Get to the point – a brief pitch

Get the details – deadline, length, etc.

Get clearance – management, legal, media relations

Get it down on paper – avoid writer's block

Get feedback – show it to colleagues

Get answers – why should readers care?

Get tough – accept red ink and rejection

Get it publicized – LinkedIn, Twitter, resume

Get a copy – PDF, URL