Last week’s session, *“It’s All About the Relationship: How to Enhance Your Professional Interactions”* added to a very successful 2023 New York Cash Exchange Conference at the Javits Center in New York City.

**Jeff Horowitz** representing Treasury Sources moderated an executive panel that included **Scott Lambert**, Treasury Managing Director at Cigna, **Frank D’Amadeo**, Head of Treasury Operations at Con Edison, and **Timanto Marima**, Director, Treasury Services at BNY Mellon.

***The session focused on topics that included:***

* Why strong and sustained business relationships are more important now than ever
* Successful experiences in working with key internal constituents
* Expectations to think of when working with financial services and technology providers and other external business partners
* The importance of diversity and inclusion
* Balancing the need for face-to-face interaction while leveraging existing and new technology as effective communications tools

***Best practices shared by the panel included:***

**Overall perspectives**

* Forward thinking companies will often bring employees together for networking opportunities
* Business leaders are not always aware of the value Treasury provides – set up meetings with key stakeholders to go over how Treasury can help with their goals
* When building professional relationships people care more about how much you care before they view how much you know – show those in your professional relationships that you care about them
* Trust always needs to be at the center of a business (or personal) relationship

**Face-to-face interactions vs. leveraging technology**

* Leveraging technology is extremely important but nothing beats “face-to-face” interactions, and many Treasury leaders expect their external business partners to meet with them face-to-face on a regular basis
* If you are joining a meeting virtually, whenever possible, “turn on the camera” to show you are actively participating
* When leading meetings, keep in mind those who have joined virtually
* If you work in a hybrid or WfA (Work from Anywhere) structure, take time to ensure you build and maintain relationships by finding ways to have “in-person” interaction with those you work with

**The importance of diversity and inclusion**

* Both diversity AND inclusion are incredibly important when building and growing high performance teams and treasury and finance teams should work very closely and in synergy with HR leaders to ensure a diverse AND inclusive working environment
* Don’t make the mistake of “combining” diversity and inclusion together – they are two separate, yet incredibly important components of high performance teams
* Diversity starts with the recruiting process – leading companies interview candidates from a wide variety of universities and make selection decisions that value different backgrounds to ensure teams have varying perspectives
* Inclusion includes creating an environment where ALL team members are comfortable to contribute to meetings and discussions – leaders need to ensure that everyone is comfortable contributing and that all ideas are being considered

If you’re looking for improvements in enhancing professional interactions for yourself or members of your team, we’d love to hear from – inquiries can be sent to

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