



Mastering Revenue Collection Strategies Training Course

20 – 24 September 2027
San Diego



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Ref: 36273_94521 **Date:** 20 – 24 September 2027 **Location:** San Diego **Fees:** 14000 Euro

Course Overview:

This course is designed to equip participants with the essential skills and knowledge to enhance their organization's revenue collection processes. In today's competitive business environment, effective revenue collection is crucial for maintaining cash flow and ensuring financial stability. This course delves into various aspects of revenue collection, including cash collection strategies, effective billing management, and the impact of VAT legislation. Participants will explore advanced collection tools and techniques, learn to develop robust collection strategies, and understand how to maximize the performance of their revenue collection teams. Additionally, the course covers assessing collection risk, leveraging revenue collections technology, and implementing customer-sensitive collection strategies. By mastering these key performance indicators for collections, participants will be able to perform complete credit risk assessments, analyze financial statements, and establish credit limits and guarantees. The training also focuses on improving billing process efficiency, integrating billing solutions, and eliminating collection barriers.

Target Audience:

- Collections Team Leaders & Senior Supervisors
- Accounts Receivable and Credit Team Members
- Billing Team Professionals
- Accountants and Financial Controllers
- Finance Professionals
- Business Managers

Targeted Organizational Departments:

- Finance and Accounting Departments
- Credit and Collections Departments
- Billing and Accounts Receivable Teams
- Customer Service and Relationship Management Teams
- Risk Assessment and Management Departments

Targeted Industries:

- Financial Services
- Retail and Wholesale
- Telecommunications
- Utilities
- Healthcare and Pharmaceuticals
- Manufacturing and Distribution
- Professional Services

Course Offerings:

By the end of this course, participants will be able to:

- Assess and mitigate collection risks
- Enhance the effectiveness of collectors
- Develop and implement customer-sensitive collection strategies
- Establish and monitor key performance indicators for collections
- Conduct thorough credit risk assessments and analyse financial statements
- Set credit limits and utilize guarantees effectively
- Improve billing process efficiency and integrate billing solutions
- Overcome collection barriers and apply effective telephone collection techniques
- Develop assertiveness and negotiation skills for successful collections
- Manage customer relationships and execute pre-delinquency and post-delinquency activities
- Implement work flow management for collectors and track performance
- Motivate collection teams and apply global best practices in revenue collection

Training Methodology:

The training course employs a blend of theoretical and practical learning methodologies. Participants will engage in case studies, group work, interactive sessions, and feedback discussions to gain a complete understanding of revenue collection processes. The course includes real-world examples and practical exercises to ensure that participants can apply the concepts learned in their own organizations.

Course Toolbox:

- complete workbooks and manuals
- Case studies and real-world examples
- Practical exercises and role-playing scenarios
- Templates for KPI development and performance tracking



Course Agenda:

Day 1: Understanding Credit Risk and Financial Health

- **Topic 1:** Credit Risk Assessment - Why Prevention is Better than Cure?
- **Topic 2:** Credit Risk Assessment - Tools, Tips, and Techniques
- **Topic 3:** Analyzing Financial Statements to Determine Company Health
- **Topic 4:** Establishing Credit Limits
- **Topic 5:** Offsetting Credit Risk: Guarantees, Bonds, and Insurance Options
- **Topic 6:** Key Data Required for the Customer Master File
- **Reflection & Review:** Review of Credit Risk and Financial Health Concepts

Day 2: Optimizing Billing Processes

- **Topic 1:** Billing Process - Getting it Right the First Time
- **Topic 2:** Billing Process Defined
- **Topic 3:** Authorisation Levels, Audit, and Control Checks
- **Topic 4:** Billing Frequency and Reconciliations
- **Topic 5:** Accounting for VAT
- **Topic 6:** Using Technology to Leverage the Billing Process
- **Reflection & Review:** Review of Billing Process Optimization

Day 3: Mastering Collection Tools and Techniques

- **Topic 1:** Key Collection Tools and Techniques
- **Topic 2:** Eliminating Barriers to Payment
- **Topic 3:** Recognizing Excuses and Delaying Tactics
- **Topic 4:** Telephone Collection Techniques
- **Topic 5:** Developing Personal Assertiveness
- **Topic 6:** Negotiation Skills for Successful Collections
- **Reflection & Review:** Review of Collection Tools and Techniques



Day 4: Strategies to Maximize Cash Collection

- **Topic 1:** Developing Effective Strategies to Maximize Cash Collection
- **Topic 2:** Identifying Effective “Pre-delinquency” Collection Campaigns
- **Topic 3:** Defining “Post-delinquency” Activities
- **Topic 4:** Customer Sensitive Collection Strategies
- **Topic 5:** Collection Techniques and Correspondence Cycles
- **Topic 6:** Using Work Flow Management to Maximize Collector Performance
- **Reflection & Review:** Review of Cash Collection Strategies

Day 5: Managing and Improving Revenue Collections

- **Topic 1:** Setting Targets and Tracking Performance
- **Topic 2:** Creating Action-oriented Reports
- **Topic 3:** Measuring Team / Individual Performance
- **Topic 4:** The People Plan - Motivating the Team and Managing Performance
- **Topic 5:** Developing Your Personal Action Plan
- **Topic 6:** Implementing Revenue Collection Best Practices
- **Reflection & Review:** Review of Revenue Collection Management Techniques

How This Course is Different from Other Revenue Collection Strategies Courses:

This course stands out from other similar courses by offering a complete, practical, and interactive learning experience. This course not only covers the fundamental concepts of revenue collection but also delves into advanced strategies and techniques that can be immediately applied in the workplace. With a focus on real-world examples, case studies, and hands-on exercises, participants will gain practical skills and insights that go beyond theoretical knowledge. The course also emphasizes the importance of integrating billing solutions, leveraging technology, and developing customer-sensitive strategies to maximize cash collection.