



Why Work as a... Credit Controller and Collector

A solution for your training needs and career progression

ROLE OVERVIEW

The focus of the Credit controller and collector role is to monitor and manage customer accounts; follow organisational policies to collect monies owed and ensure that work quality targets are met. This requires proactive interaction with customers who have not paid or who have reached credit limits or terms in order to minimise bad debts while retaining positive relationships for the longer term.

KEY POINTS

- **Level:** 2
- **Duration:** 12 months + End Point Assessment
- **Entry requirements:** You may be required to undertake training in maths and English. See [HERE](#) for more information
- **Career progression:** Options include Financial Services Customer Advisor and Advanced Credit Controller and Debt Collection Specialist

KNOWLEDGE REQUIREMENTS



- Understanding of the principles of credit management and collections together with a sound understanding of organisational policies and techniques
- Understanding of the legal, regulatory, risk and compliance framework within which they operate, with a sound understanding of relevant risk and compliance requirements for their role
- Understanding of the products and services offered to customers by their organisation, together with sound knowledge of the products and services that they support
- Understands the systems, tools and processes used in the role, together with the standards to be met, including IT tools

SKILL REQUIREMENTS



- Delivers excellent service to customers using the organisation's systems and processes
- Takes ownership through to completion, escalating when required, e.g. potential debt risk
- Communicates effectively with customers and colleagues, using sound interpersonal skills, a range of media and appropriate language
- Works with customers to identify mutually acceptable solutions to credit issues, within organisational guidelines
- Identifies opportunities to improve work practices
- Seeks feedback and acts on it to improve their performance

BEHAVIOUR REQUIREMENTS



- Truthful, sincere and trustworthy in their actions. Shows integrity by doing the right thing. Maintains appropriate confidentiality at all times
- Adapts positively to changing work priorities and patterns when new tasks need to be done or requirements change
- Displays energy and enthusiasm in the way they go about their role, dealing positively with setbacks when they occur. Stays positive under pressure

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