



**Credit Controller  
/ Collector**  
**Level 2**

*Seetec*  
OUTSOURCE



# Credit Controller/Collector

## Programme overview

**Level:** 2

**Duration:** Approximately 15 months (including end-point assessment)

### Who is the programme suited to?

This apprenticeship would suit individuals working within credit management. Typical duties could include processing credit applications, agreeing credit terms and/or payment arrangements, invoicing, monitoring payment, allocating and reconciling cash and debt support.

The programme builds the technical and interpersonal skills needed to manage and monitor customer accounts effectively. Learners will be taught how to interact proactively with customers to collect money owed whilst retaining positive relationships for the longer term, as well as developing an understanding of the ways in which credit management protects cash flow in order to facilitate all wider business activity.

There are no mandatory qualifications for this programme, although some employers may embed the Chartered Institute of Credit Management (CICM) Certificate in Credit Management.

You'll be eligible to apply for affiliate membership of the CICM when you successfully complete the programme.

### TYPICAL JOB ROLES

- Credit controller
- Credit collector
- Customer account clerk
- Purchase ledger clerk
- Accounts receivable clerk

# Key learning outcomes

## Knowledge

- Broad understanding of the principles of credit management and collections.
- A sound understanding of organisational policies and techniques used in their role, e.g. credit terms.
- Use of external sources of information, e.g. credit scores; and policies for handling vulnerable customers.
- Broad 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.
- Understands professional standards; the nature and priorities of the organisation they work in; organisational 'values'; and where their role fits in the organisation.
- Understands the different areas of the organisation that they need to work with, e.g. sales.
- Broad understanding of the products and services offered to customers by their organisation.
- Sound knowledge of the products and services that they support, and how their role supports the delivery of these products and services.
- Understands the systems, tools and processes used in the role, together with the standards to be met, including IT tools.





# Key learning outcomes

## Skills

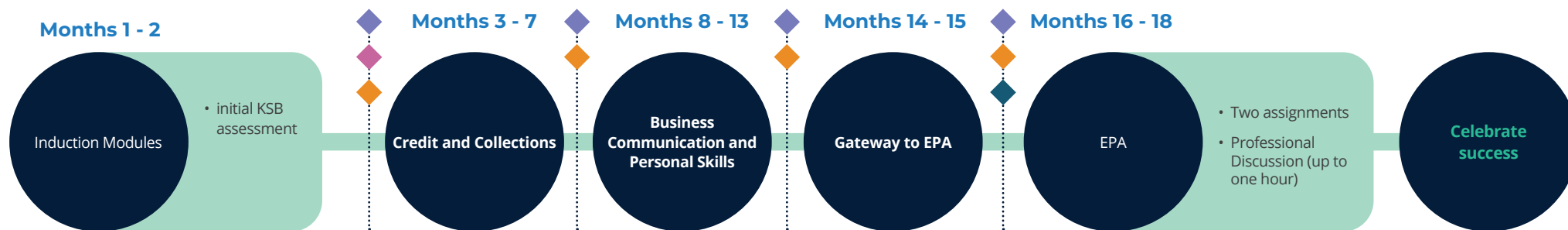
- Delivers excellent service to customers using the organisation's systems and processes
- Contributes to individual and team objectives, in line with the employer's policy
- Works in a way which reflects organisational values and complies with standards and regulatory requirements
- Carries out a range of tasks which may include credit application processing, cash allocation and reconciliation
- Proactive contact with customers to collect outstanding balances
- Maintaining accurate records of communications, actions; straight-forward dispute resolution; and recommending write offs.
- Organises their own accounts, completing tasks to required deadlines.
- Tracks individual customer accounts where necessary.
- Builds and maintains good working relationships within teams and with other business areas where necessary.
- Builds good relationships with customers, recognising their relationship with and their importance to the organisation while dealing with a potentially difficult topic.
- Works with customers to identify mutually acceptable solutions to credit issues, within organisational guidelines.
- Identifies opportunities to improve work practices and successfully implements changes that are required.
- Seeks feedback and acts on it to improve their performance.

## Behaviours

- Truthful, sincere and trustworthy in their actions- 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.

# Learner journey

This is an example learner journey and the timeline for completion may vary. The apprenticeship development coach (ADC) and the employer will agree when the learner is ready to be submitted to gateway for end point assessment (EPA).



◆ ADC coaching and feedback

◆ Functional skills (FS)

◆ Learner review

◆ Personal Development Plan and Review



## Programme delivery

Apprentices follow a personalised learning plan tailored to their organisation and role. Supported by an experienced development coach, they undertake a range of 'blended learning' activities that can usually be completed in the workplace.

### Blended learning activities could include:

- Facilitated workshops
- E-learning
- 1-2-1 coaching
- Self-directed learning
- Collaborative learning
- Research
- Industry visits
- Work shadowing
- Mentoring
- Assignments

All apprentices need to demonstrate that they have achieved a level 1 and are working towards a level 2 in English and maths before they can proceed to end-point assessment.

## Why Seetec Outsource?

Part of the employee-owned Seetec group, we're one of the UK's leading providers of employment and training. We have more than 35 years' experience helping businesses and individuals to unlock potential through high-quality apprenticeships, skills training and work-based learning programmes across a range of sectors and occupations.

Our approach is consultative and we aim to be partners in our clients' success. We work closely with employers to gain an understanding of organisational objectives and workforce learning and development needs, helping them to select the right training solutions for their business. We then design and deliver programmes tailored to the needs of the organisation and the learners we support, with a focus on ensuring programme outcomes can be evidenced through improved practice in the workplace.

We also bring an energy and positive attitude that stems from our employee-owned status. Every Seetec colleague is encouraged to innovate, strive for excellence and take responsibility for their overall contribution to the business. These are values that we instil throughout our work.

[seetecoutsource.co.uk](https://seetecoutsource.co.uk)



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