

### April 2016 - Face-to-face 1 day program

### Sydney, Brisbane and Melbourne

#### Overview and Learning outcomes

Credit is more available today than ever before with a variety of purposes and accessible from a range of organisations. This can be a personal or business loan from a bank, a home loan from a credit union, purchase and cash advanced on a credit card from credit card companies, or a car and/or other loans from specialist loan agencies. Also there is the important dimension to business credit also known as trade &/or commercial credit.

With the wide availability of credit comes the risk that the credit provided will not be returned and promised payments will not be made. This course explores the skills and knowledge needed to correctly initiate and complete the management of customer accounts which have outstanding payments.

#### Outcomes are covered within this unit:

This course deals with the key aspects of dealing with overdue customer accounts -

- **Identify customers requiring collection activity** – including the need to monitor your organisation's overdue account reporting system, access and retrieve relevant information and records, and review overdue debtors in accordance with relevant policies
- **Establish contact with a customer and attempt to resolve outstanding payment matters** – including proposing appropriate communication with the customer and obtaining appropriate authorisation, making contact with the customer and building rapport, and advising relevant organisation(s) regarding the purpose of contact
- **Negotiate resolution of outstanding payments with the customer** – including advising debtors of the possibility of legal action for non-payment, using appropriate techniques to achieve resolution, confirming negotiation outcomes and diarising further actions;
- **Monitor payment agreement to ensure the customer has adhered to the agreement** – including reviewing accounts regularly to check payments have been received, dealing with breaches of the agreement promptly and appropriately, and referring outstanding payment matters to appropriate personnel.

Participants that undertake and successfully complete the assessment requirements for **FNSCRD405 Manage overdue customer accounts** which is a Core unit from the FNSFNS40115 Certificate IV in Credit Management will receive a nationally recognised Statement of Attainment.

## NOMINATION FORM

### FNSCRD405A Manage overdue customer accounts

First Name \_\_\_\_\_ Surname \_\_\_\_\_

Company \_\_\_\_\_

Mailing Address \_\_\_\_\_ Postcode \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_

Will you be undertaking this training under a Traineeship arrangement?

Tick box if under 18yrs

Special dietary requirements \_\_\_\_\_

For other special requirements contact AICM

Emergency contact number \_\_\_\_\_

Name of person to be contacted \_\_\_\_\_

#### Fees, Cancellation & Refund Policy

For courses that have a fee greater than \$999 a \$500 deposit is required and the balance is to be paid once training has commenced. For course fees less than \$999 this must be paid in full prior to the commencement of the course.

Cancellations received less than 10 days before commencement are subject to a cancellation fee of 50% of the course fee.

The enrolment of a substitute, advised in writing (email is sufficient) prior to the commencement of the course, will be accepted.

Any course may be cancelled by AICM if insufficient participants are registered and a full refund will be made in such cases.

#### Privacy

Personal details will remain in confidence and in accordance with the Australian Institute of Credit Management's privacy policy.

#### Copyright

Copyright of all materials provided rests with AICM, unless agreed otherwise in writing.

#### Liability

Whilst all care is taken in providing training, AICM does not accept any liability for the use made by the client or its employees or agents of any training, products, instruments or services provided.

## PAYMENT OPTIONS

### FNSCRD405A Manage overdue customer accounts

**Brisbane**  
**Tattersalls Club**  
215 Queen St,  
Brisbane  
8<sup>th</sup> April 2016

**Melbourne**  
**Parkview Hotel**  
562 St Kilda Rd  
Melbourne  
13<sup>th</sup> April 2016

**Sydney**  
**AICM National Office**  
Level 3 Suite 303  
1-9 Chandos Street, St Leonard  
22<sup>nd</sup> April 2016

**AICM Member**  **\$750.00 (GST exempt)**

**Non Member:**  **\$930.00 (GST exempt)**

Please find **enclosed cheque** for \$ \_\_\_\_\_

**OR**

Visa / MasterCard / Amex / Diners #: \_\_\_\_\_

Expires: \_\_\_\_/\_\_\_\_ CSV Number: \_\_\_\_\_

Cardholder's Name (Printed): \_\_\_\_\_ Signature: \_\_\_\_\_

**OR**

**EFT payment** (please quote name)

Bank details as follows:

Commonwealth Bank, Artarmon NSW      BSB: 062 104    Account: 1003 9560

**OR**

**Invoice:**

Learner -

Signature: \_\_\_\_\_

Print name: \_\_\_\_\_

Email: \_\_\_\_\_

Company -

\*Person responsible for payment

Signature: \_\_\_\_\_

Print name: \_\_\_\_\_

Telephone: \_\_\_\_\_