

Debtor Assessment and Portfolio Management

With the large number of debtors that a debt recovery professional has to manage, it can at times feel like the updating and maintaining of all records is both daunting and impossible. With this course you will learn how to effectively maintain your records and update relevant details, manage and review allocations, evaluate debtor accounts and provide detailed statements of accounts. Manage your debtor portfolio with ease with the useful guidelines laid out in this course!

What you will learn:

At the end of this programme, you should be able to:

- Manage debtor accounts
- Evaluate debtor accounts
- Profile accounts
- Allocate and log accounts
- Review allocation on an ongoing basis

Course Content:

- Section 1: Evaluate debtor accounts
- Section 2: Profile debtor accounts
- Section 3: Portfolio management and diarising procedures
- Section 4: Detailed statements of accounts

Course Structure:

- Lectures
- Structured classroom discussions / Debates
- Practical exercises

Assessment:

Formative assessment is done through practical exercises, and facilitator-led discussions. The summative assessment is a practical workplace activity.

Accreditation:

This programme is in process of being registered as a learning programme on the BNVQF (Botswana National Vocational Qualifications Framework).



Entry Requirements:

It is assumed that learners are currently employed in a debt recovery/collection role and will have the opportunity to interact with debtor accounts and portfolios in order to complete assessments.



Duration:

One day



Certification:

Certification of learning achievements will be issued upon successful completion of the summative assessment and the learner being deemed competent against the learning programme outcomes.

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