

Collections Analyst Training Program

This program is designed to give you an expert level understanding on collections, dunning, negotiations and best practices.

Meet Your Expert Instructors



Robert S. Shultz
Founder,
Quote to Cash Solution

He has thirty years of experience as a global credit and financial executive for large multi-national companies. He is the Founding Partner of Quote to Cash Solutions



Gaurav Kataria
Senior Consultant,
HighRadius

He is experienced in project management. He has good knowledge of SAP FSCM Module, C++, SQL, MATLAB, PYTHON, Optimization and Data Analysis



Girija Sahu
Senior Consultant,
Netsuite Suite
Foundation Certified

She has five years of experience in Oracle NetSuite. With tremendous knowledge on ERP modules, she is fully capable of handling multiple client accounts with an emphasis on customer satisfaction



Manmohan Jain
Chief Catalyst at
Zensark * Salcit * India
Literacy Project

He has 25+ years experience in diverse technical and managerial roles, including Software Design, Product Development, Management and Operations

Collections Analyst

Course Curriculum

1. Collection Calls Negotiations Ultimate Guide

- ▶ The ABC's of Collection Call Negotiations
- ▶ How to Prepare for Collections Negotiations
- ▶ Verbal & Non Verbal Collections Negotiation Guide
- ▶ Collections Negotiation Tactics and Techniques
- ▶ Negotiation Styles & Collector's Behaviors
- ▶ How Cultural Differences Could Affect Negotiations
- ▶ Essential Strategies for an Effective Negotiation
- ▶ Trade-off vs Compromise in Collection Calls
- ▶ Create A Win Win Negotiation Collections Strategy
- ▶ Dealing with Deceptive Customers in Collections Negotiation
- ▶ Handling Deceptive or Overly Aggressive Negotiation Tactics
- ▶ Principled Negotiation in B2B Collections: An Introduction
- ▶ Principled Negotiation in B2B Collections: A Deep Dive
- ▶ Collections Negotiation Guide: FAQs

Robert S. Shultz

🕒 180 mins

O2C

2. SAP FSCM Collections, Worklists & Processing A/R

- ▶ Understanding Key Components of SAP Collections Management
- ▶ Understanding Major Processes in SAP Collections Management
- ▶ Collections Worklist 101 in SAP Collections Management
- ▶ Fundamentals of SAP Collections Management

Gaurav Kataria

🕒 60 mins

SAP

3. Customizing Aging Reports in Microsoft Dynamics D365

- ▶ Understanding the Terminologies of Microsoft D365 Collections
- ▶ How to Configure Dynamics 365 Aging Period Definitions
- ▶ How to Create Customer Aging Snapshot in d365
- ▶ How to Generate Customer Aging Report in Dynamics 365

Manmohan Jain

🕒 30 mins

MICROSOFT DYNAMICS

4. A/R Aging Report Customization & Analysis In NetSuite

- ▶ How to Build An A/R Aging Report in NetSuite
- ▶ How to Customize An A/R Aging Report in NetSuite
- ▶ How to Do Past-Due Analysis Using A/R Aging Reports

Girija Sahu

🕒 30 mins

NETSUITE

5. Debt Collection Calling & Negotiation Training

- ▶ The ABCs of Speaking and Negotiations
- ▶ Collections Calls: Handling Customer Objections
- ▶ Proactively Identifying Payment Danger Signals
- ▶ Collection Calls and the Law
- ▶ Effective Telephone Collection Techniques

Robert S. Shultz

🕒 100 mins

O2C

EXPLORE MORE