



RESTORE CCT

Credit as a System.

Credit Controller Workshop: Cash Collection & Customer Behaviour Mastery

Designed to strengthen cash flow by improving collection effectiveness and customer behaviour management.

This workshop develops the practical skills required to collect cash effectively, manage customer behaviour, and maintain control of the credit process without damaging relationships.

Designed for:

- Credit controllers
- Debtors staff moving into collection roles
- Teams struggling with overdue debt and cash flow

Structure:

Each module = 2-day session

Each module = practical application + real-world scenarios

Module Breakdown:

1. The Reality of Collections

Outcome: Understand what drives payment.

Practical: Analyse real collection scenarios to identify why customers delay payment and how to respond effectively

Mindset Shift: “From I follow up” to “I influence payment behaviour”

- Why customers don't pay (real reasons vs excuses)
- The gap between process and behaviour
- The cost of weak collections
- The role of the credit controller in cash flow

2. Customer Behaviour & Risk Signals

Outcome: Identify risk before it becomes default.

Practical: Analyse customer scenarios

Mindset Shift: “From reacting to late payment” to “actively reading behaviour and anticipating risk early”

- Reading payment patterns
- Identifying early warning signs
- Differentiating between can't pay vs won't pay
- When to act vs when to monitor
- Understanding customer legal structures and risk implications

3. Effective Collection Conversations

Outcome: Move from promises to payment.

Practical: Analyse customer call scenarios

Mindset Shift: “From asking for payment” to “confidently leading the conversation toward commitment and action”

- Professional communication
- Structuring a collection call
- Controlling the conversation
- Handling excuses without losing authority
- Securing commitment (not vague promises)

4. Prioritisation & Age Analysis (80/20 Application)

Outcome: Focus on what moves cash.

Practical: Build a priority list

Mindset Shift: “From treating all accounts equally” to “focusing effort where it delivers the greatest cash impact”

- Understanding age analysis properly
- Identifying high-impact accounts
- Workload prioritisation
- Avoiding “busy but ineffective”

5. Dispute & Query Management

Outcome: Remove barriers to payment quickly.

Practical: Analyse dispute scenarios

Mindset Shift: “From managing queries as admin tasks” to “resolving them as critical blockers to cash flow”

- Why disputes delay cash
- Identifying valid vs delaying tactics
- Driving resolution across departments
- Keeping control while resolving issues

6. Negotiation & Maintaining Control

Outcome: Protect the business while securing payment

Practical: Analyse agreement scenarios

Mindset Shift: “From accommodating the customer” to “leading firm, fair agreements that protect cash and control”

- When to negotiate
- Setting boundaries
- Payment plans that work
- Avoiding “soft agreements”

7. Cash Flow Thinking (Beyond Chasing Debt)

Outcome: Understand the bigger impact of collections

Practical: Review collection activities and link actions to their impact on cash flow outcomes

Mindset Shift: “From chasing invoices” to “managing cash flow as a business outcome”

- How collections impact cash flow
- Linking daily actions to business outcomes
- Working with finance and sales
- Moving from reactive to proactive

8. Discipline, Systems & Follow-Up Structures

Outcome: Build consistency that drives results

Practical: Design a structured follow-up routine to improve consistency and reduce missed commitments

Mindset Shift: “From I follow up when needed” to “I follow a structured system that drives results”

- Daily and weekly routines
- Follow-up structures that work
- Tracking commitments
- Preventing slippage

Workshop Outcomes

By the end of this workshop, delegates will:

- Influence customer payment behaviour with greater confidence and control
- Conduct structured, effective collection conversations that lead to commitment and payment
- Identify risk signals early and take appropriate action to prevent overdue debt
- Prioritise accounts effectively to focus on actions that improve cash flow
- Remove barriers to payment through structured dispute and query management
- Negotiate payment solutions without compromising business control
- Understand how their actions directly impact cash flow and business performance
- Operate with discipline and consistency in collection management

Pricing:

R1,350 per module (2-day session)

Discount available for full workshop enrolment

Corporate/group pricing available on request

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