

CICM Apprenticeships



**SYLLABUS FOR
LEVEL 2 CREDIT
CONTROLLER/ COLLECTOR
APPRENTICESHIP
END-POINT ASSESSMENT**

CICM

Chartered
Institute
of Credit
Management

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The Recognised Standard

T: 01780 722909

E: education@cicm.com

www.cicm.com

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Credit Controller/Collector Apprenticeship

Level 2	Duration	12 – 18 months	Maximum funding	£5,000
Assessment Plan ref:	ST0176/AP01		Ofqual portal ref:	603/2684/0

CREDIT MANAGEMENT OCCUPATION

Credit management is a dynamic function found across all sectors of UK and international commerce and offers a range of challenging and interesting specialisms. Given the importance of credit management and collections, roles are central to many operations, typically setting policies, facilitating sales, management financial risk and customer relationships. Through this work credit management protects cash flow and facilitates all wider business activity.

Commercial teams have significant responsibility and manage high value accounts. Roles are typically fast-paced and target driven, requiring detailed knowledge of law, regulations and the business environment, and skilled practitioners possess excellent technical and interpersonal skills. Credit management and collections are rewarding career choices for self-motivated and enthusiastic individuals who would enjoy a varied role working at the centre of operations.

ROLE PROFILE

The focus of the Credit Controller/Collector is typically to monitor and manage customer accounts; follow organizational policies to collect monies owed and ensure that work quality targets are met. This requires proactive interaction with customers who have not paid or who have reached credit limits or terms in order to minimize bad debts while retaining positive relationships for the longer term. The range of activities within the role could include, but are not limited to, processing credit applications; agreeing credit terms and/or payment arrangements; invoicing; monitoring payment; allocating and reconciling cash; proactively contacting customers to collect debt/outstanding balances; resolving straight forward disputes; debt support and recommending write-offs.

PROGRESSION

This apprenticeship is likely to be an entry level role to the organisation. The apprenticeship is pitched at Level 2 (see Appendix D for Ofqual level descriptors). On completion of this apprenticeship, the apprentice will be fully competent in the role and could continue to develop their career within the organisation through a range of possible pathways.

These include **senior credit controller/collector, credit risk analyst, team leader and credit manager**. If the apprentice chooses to study for CICM qualifications, they will become studying members of the Chartered Institute of Credit Management. This will put them on the pathway towards full qualification as a credit manager and full professional membership of the Chartered Institute of Credit Management.

ENTRY REQUIREMENTS

Individual employers set the selection criteria for their Apprenticeships. The Apprenticeship Standard recommends that employers may want most candidates to have Level 2 Maths and English. Other relevant or prior experience may also be considered as an alternative. See the CICM website for an overview about credit management related apprenticeship options and links to the Institute for Apprenticeships and Technical Education (IfATE) website where you can download the Apprenticeship Standard and Assessment Plan for the Credit Controller/Collector apprenticeship.

APPRENTICESHIP SUMMARY

The apprenticeship requires a minimum of 20% off-the-job training in order to develop the specific knowledge, skills and behaviours required for the credit controller/collector role, and prepare for the 'Gateway' to the apprenticeship End-point Assessment (EPA):

Knowledge	Skills	Behaviours
Credit Management Regulatory and compliance Industry and organisation understanding Products and services Systems and processes	Service delivery Work planning Teamwork Communication and relationship building Negotiation and decision-making Continuous improvement Personal development	Honesty and integrity Flexibility Resilience

See Appendix A for detailed content

Typically the apprenticeship lasts 18 month but the minimum period is 12 months. The apprentice focuses on EPA during the last 3 – 4 months. End-point assessment involves two assignments and a professional discussion. The Assessment Plan summarises timescales and the roles and responsibilities of employers, training providers and end-point assessment organisations at different stages of the apprenticeship (see also diagram in Appendix B).

APPRENTICE JOURNEY



ON-PROGRAMME LEARNING

During the on-programme learning stage, employers and their training provider develop the apprentice's knowledge, skills and behaviours through training and performance management.

Employers select training providers and supporting training providers from the Education and Skills Funding Agency's (ESFA) Register of Apprenticeship Training Providers.

Qualifications

There are no mandatory professional qualification requirements during the apprenticeship. However apprentices will achieve a Level 2 Certificate Credit and Collections on successful completion of the EPA because CICM has mapped this assessment against CICM qualifications. The CICM Certificate is internationally recognised and regulated by the Office of Qualifications and Examination Regulations (Ofqual).

GATEWAY

Towards the end of the apprenticeship, the apprentice, their training provider and employer completes a 'Gateway' review to determine whether the apprentice is competent in their role and has passed any mandatory requirements. EPA only starts once the employer is satisfied that:

- the apprentice is consistently working at, or above the level set out in the Standard
- any pre-requisite Gateway requirements for EPA have been met, and that they can be evidenced to an End Point Assessment Organisation (EPAO).

Gateway requirements

Before taking their EPA, the credit controller/collector apprentice must have:

- achieved Maths and English at Level 1 and have taken the test for Level 2 English and Maths prior to completion of their apprenticeship. For those with an education, health and care plan or a legacy statement, the English and Maths minimum requirement is Entry Level 1. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.
- achieved a minimum duration of 12 months on their apprenticeship journey.

Gateway pack

Following completion of the Gateway review between the apprentice, training provider and employer, the employer or training provider contacts their chosen EPAO to request a Gateway pack. In the case of CICM this includes:

- Full guidance on the EPA process
- Apprentice declaration form
- Training provider/employer declaration form
- Training provider contract detailing fees.

END POINT ASSESSMENT

EPA must be conducted by an organisation (EPAO) approved to offer EPA services, as selected by the employer from the Education and Skills Funding Agency's (ESFA) Register of End Point Assessment Organisations (RoEPAO), such as the Chartered Institute of Credit Management (CICM). CICM recommends that employers/training providers get in touch at an early stage to establish a relationship and find out more about fees and how CICM conducts EPA. The Education and Skills Funding Agency (ESFA) requires employers/training providers to indicate their chosen EPAO at the start of their apprentice's journey.

CICM is Europe's largest recognised professional body in the world for the credit community and Ofqual regulated. The Institute strives for a high quality customer experience, and fair, reliable and consistent assessment decisions. Apprentices, employers and training providers can be confident in the end-to-end management of their EPA experience and the quality of their EPA awards. CICM represents the profession across trade, consumer and international credit and draws assessors from the credit management, collections and enforcement community, carefully managing any potential conflicts of interest. The Institute was established in 1939 and having awarded qualifications since 1949, has considerable experience in credit management related assessment. CICM has an experienced and dedicated EPA team and manages all aspects of EPA centrally at CICM Headquarters.

The purpose of the end-point assessment (EPA) is to determine that all learning outcomes for the Apprenticeship Standard have been met and the grade the apprentice should be awarded.

Registration with the CICM

Apprentices register with the CICM EPAO in order to undertake the EPA. However additionally CICM recommends that apprentices at the start of their apprenticeship journey join the CICM professional body as studying members in order to enrich their programme with role specific guidance and resources (Find out more about CICM membership benefits on the CICM website).

Assessment methods

The focus of EPA is on the apprentice being able to demonstrate competence in their role and meet the learning outcomes set out in the Assessment Plan, illustrating this through work which they have completed recently (See Appendix C for learning outcomes and assessment criteria). The EPA contains two assessment methods which must be completed in this order:

Assignments	Professional discussion
First the apprentice completes two assignments that are based on real work completed by them. One relates to business skills and behaviours and the second focuses more specifically on job specific knowledge, skills and behaviours.	The professional discussion is a structured interview between CICM's assessor, which: <ul style="list-style-type: none">• Explores evidence for areas of the Standard that are best assessed verbally.• Clarifies any questions that the assessor has about the evidence submitted in the assignments• Investigates how the apprentice has progressed in their role, what specific work they have been involved in and their approach.• Provides the basis for the decision about the grade to be awarded.
Grading – Pass/Distinction/Fail	Grading – Pass/Distinction/Fail

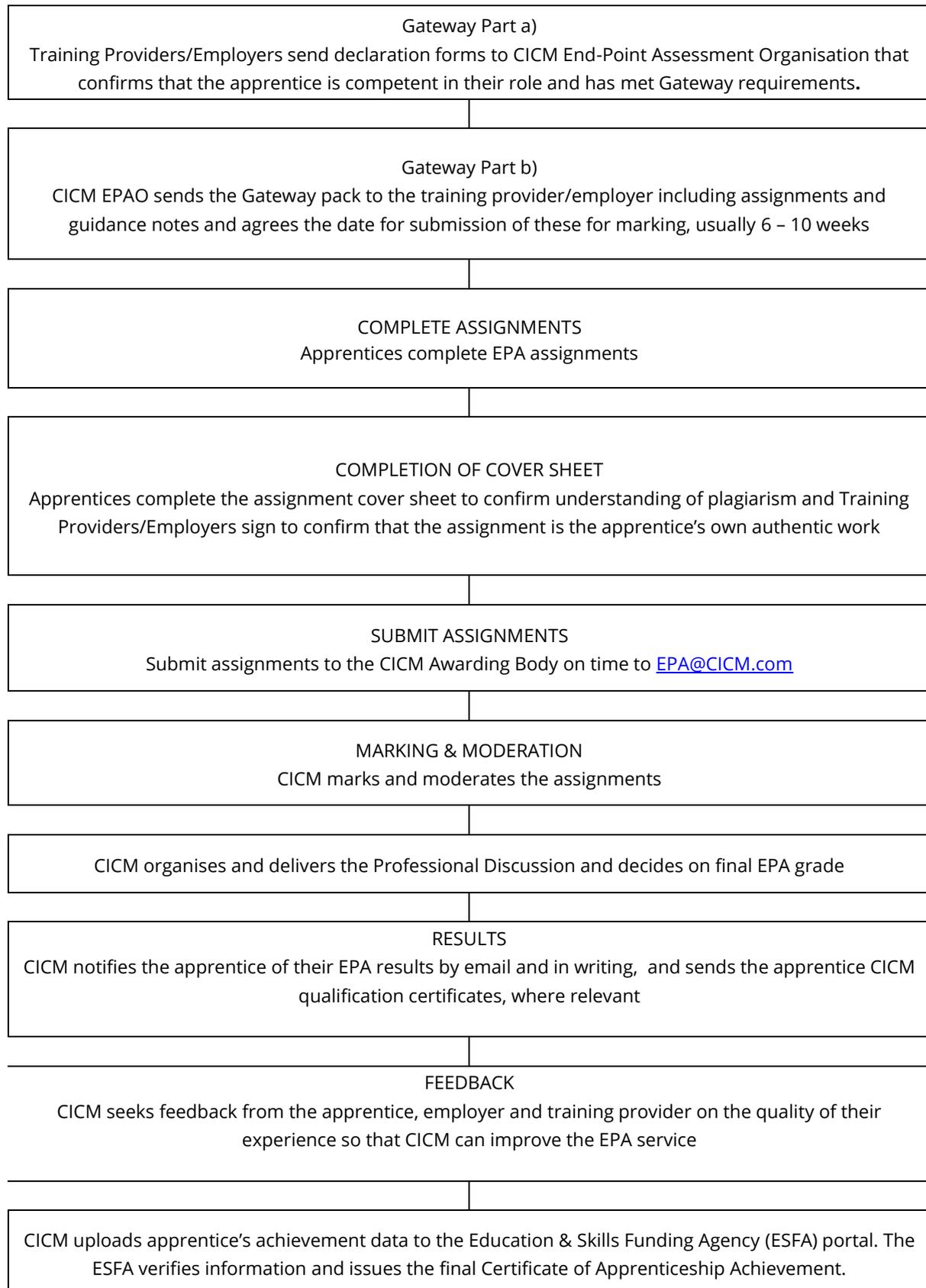
Assignments

Following completion of the Gateway process, CICM sends the EPA assignments and guidance to the apprentice via their training provider/employer. Apprentices have 6 – 10 weeks to complete the assignments. Meanwhile CICM agrees with the training provider/employer the assignment submission date and provisional date for the professional discussion.

Professional discussion

The professional discussion is generally carried out remotely by video conference, depending on the apprentice's location and the number of other apprentices requiring EPA at that time. CICM works with the employer to test the connection beforehand to minimise risks of disruption.

SUMMARY OF CICM EPA PROCESS



GRADING

CICM decides on the final EPA grade (pass, distinction or fail) based on the scoring of the two assignments and the professional discussion. The apprentices must pass all parts of the apprenticeship. The distinction grade is designed to recognize apprentices who are seen as outstanding employees, regularly going beyond what is required to be competent in the role and seen as having the greatest potential for the future.

Distinction grade criteria

An apprentice who achieves a distinction grade can be described as:

Higher Assessment Criteria

- Consistently exceeding the standards set for the role (both what is delivered and how it is delivered)
- Able to perform well in difficult situations or when under pressure.
- Being seen as a role model by others
- Able to work upwards as well as with peers
- Shows perceptive understanding of the wider context of the work they are doing.

These relate to the following skills/behaviours:

- Service delivery
- Work planning
- Teamwork
- Communication and relationship building
- Negotiation and decision making
- Continuous improvement
- Personal development
- Honesty and integrity
- Flexibility
- Resilience.

For a distinction grade an apprentice must pass all parts of the apprenticeship and meet at least **one** of the higher assessment criteria for **all** skills/behaviours above.

The following table shows how CICM combines assessment component grades in order to determine the overall grade for Level 2 Credit Controller/Collector EPA:

Assignment	Assignment	Professional Discussion	Overall Grade
Distinction	Distinction	Distinction	Distinction
Distinction	Pass	Distinction	Distinction
Pass	Pass	Distinction	Distinction
Distinction	Distinction	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Pass	Pass	Pass
The Apprentice has not achieved a minimum of a Pass in both methods			Fail

Arrangements for reasonable adjustments

CICM will make reasonable adjustments to EPA to ensure equality of opportunity and to enable apprentices with particular conditions to demonstrate their knowledge, skills or understanding. Please contact the CICM for the guidance booklet which explains how an apprentice qualifies for an adjustment and what adjustments will be made.

Assessment resits/retake

If an apprentice fails one EPA component, they can re-sit that component. **A resit does not require further learning.** If they fail both EPA components, then further development must be provided prior to a retake. **A retake requires the apprentice to undertake further learning** and therefore the apprentice would need to go through the Gateway process again. A resit or a retake is at the employer's discretion.

If resits or retakes are required, apprentices should complete these within 12 months. There is no limit to the number of resits or retakes within this period. CICM provides a report advising areas for development. Normally CICM would defer the professional discussion until the apprentice had passed both assignments.

The maximum grade available for an apprentice who resits/retakes is a Pass, unless exceptional circumstances apply. An apprentice cannot resit/retake any part of the EPA

in order to increase their grade from a Pass to a Distinction. An exceptional circumstance could be related to (but not limited to) an apprentice falling ill during the assessment method. It is therefore important that an apprentice does not progress through Gateway until the employer and training provider are confident that they are ready for EPA.

Any appeals in relation to the outcome of the EPA will be managed by CICM whose decision is final. The CICM results enquiry and appeals policy is on the CICM website.

EPA results

CICM notifies results to apprentices initially by email and follows up with a results letter with certificates for CICM qualifications in the case that the apprentice has achieved the CICM Level 2 Certificate.

CERTIFICATION

CICM uploads results to the Education & Skills Funding Agency (ESFA) and it is the ESFA who will verify and issue the final apprenticeship certificate to the apprentice.

Appendix A

Apprenticeship Standard requirements

Knowledge, skills and behaviours that the apprentice will demonstrate on completion:

Knowledge	What is required
Credit management	Broad understanding of the principles of credit management and collections together with 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.
Regulatory and compliance	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, e.g. credit management policies, data protection, treating customers fairly, potentially fraudulent transactions, including anti-money laundering arrangements and financial and sector regulatory requirements depending on the type of collections.
Industry and organisation understanding	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.
Products and services	Broad understanding of the products and services offered to customers by their organisation, together with sound knowledge of the products and services that they support, and how their role supports the delivery of these products and services.
Systems and processes	Understands the systems, tools and processes used in the role, together with the standards to be met, including IT tools.

Skills	What is required
Service delivery	Delivers excellent service to customers using organisational systems and processes; contributes to individual and team objectives, in line with organisational 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/debt; maintaining accurate records of communications/actions; straight-forward dispute resolution; and recommending write offs.
Work planning	Organises their own accounts, completing tasks to required deadlines. Tracks individual customer accounts where necessary. Takes ownership through to completion, escalating when required, e.g. potential debt risk.
Teamwork	Consistently supports colleagues/collaborates to achieve results. Builds/maintains good working relationships within teams and with other business areas where necessary. Aware of own role in the team and the impact on others.
Communication and relationship building	Communicates effectively with customers/colleagues, using sound interpersonal skills, a range of media and appropriate language, e.g. phone, email, SMS, letter and face-to-face. Builds good relationships with customers, recognising their relationship with and their importance to the organisation while dealing with a potentially difficult topic. Adapts their style to that of the customer and actively listens to understand their needs. Handles difficult and sensitive situations professionally when they occur, e.g. regarding overdue accounts, working to support and retain a positive relationship with the customer.
Negotiation and decision making	Works with customers to identify mutually acceptable solutions to credit issues, within organisational guidelines. Takes ownership through to resolution, escalating where necessary.
Continuous improvement	Identifies opportunities to improve work practices and successfully implements changes that are required.

Personal development	Seeks feedback and acts on it to improve their performance. Builds their own capability through ownership of their own development, working with their manager. Keeps up to date with relevant changes.
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Behaviours	What is required
Honesty & Integrity	Truthful, sincere and trustworthy in their actions. Shows integrity by doing the right thing. Maintains appropriate confidentiality at all times.
Flexibility	Adapts positively to changing work priorities and patterns when new tasks need to be done or requirements change.
Resilience	Displays energy and enthusiasm in the way they go about their role, dealing positively with setbacks when they occur. Stays positive under pressure.

Apprenticeship Standard reference: ST0176

Appendix B

Timescales, roles and responsibilities

Month	Apprentice	Employer	Training Provider	Professional Body	Assessment Organisation
0	Understand job role and apprenticeship commitment	Deliver induction training and understand role in apprenticeship	Explain apprenticeship, roles, timetable and commitments. Provide initial diagnostic assessment. Completes SFA admin req'ts		
1-12	Works to role objectives / KPIs / training plan Develops Knowledge, Skills, Behaviours Studies and takes Qualification/Units	Manages as any other employee inc Performance Management via monthly 1to1s etc	Monitors progress; identifies gaps; delivers apprentice learning and support as required. Completes SFA admin req'ts	Provides qualification content if employer chooses to include the qualification units	
6-12		Supports and coaches	Supports and trains		
13-14	Continues building required Knowledge, Skills, Behaviours	'Gateway' to end point assessment: Employer and TP review progress and agree whether Apprentice has achieved competency levels required vs all learning outcomes.			
14-15	Apprentice, Employer and TP work together to agree the make up of the 2 elements of End Point Assessment (Assignments and Professional Discussion). TP signs off vs Assessment Plan requirements				
16-17	Completes Assignments. Submits for assessment. Takes part in Professional Discussion	Reviews Assignments and submits for assessment.	Supports completion of Assignments and preparation for Professional Discussion		Assesses Assignments and conducts Professional Discussion
18		Discusses grade for apprentice if there is disagreement. Informs apprentice.	Discusses grade for apprentice if there is disagreement. When decision made, checks submission, administers as required.		Recommends final result for apprentice Chair discussion to finalise grade for apprentice if there is disagreement.

Apprenticeship Assessment Plan: ST0176/AP01

Appendix C

Level 2 Credit Controller/Collector Apprenticeship EPA

Learning outcomes and assessment criteria

Ofqual reference: 603/2684/0

Assessment: 2 assignments and professional discussion

	Learning outcomes The apprentices will:		Assessment criteria The apprentice can:
1.1	Understand the principles of credit management and collections	1.1	Explain importance of credit control/ collections in their function.
		1.2	Describe how a credit management and/or collections function is organised.
1.2	Understand in detail the organisational policies and techniques used in their role	1.2	Explain organisational policies which relate to their role and techniques used.
1.3	Understand how to use external sources of information	1.3	Describe their use external sources of information, if applicable
1.4	Understand the policies for handling vulnerable customers	1.4	Describe how to vulnerable customers are supported, if applicable
2.1	Understand the legal, regulatory, risk and compliance framework within which they operate	2.1	Identify key risk and compliance policies, laws and regulations which relate to their work
2.2	Understand in detail the relevant risk and compliance requirements for their role	2.2	Describe in detail the relevant risk and compliance requirements for their role
3.1	Understand the professional standards they need to work within	3.1	Explain how their organisational standards and values influences the way that they carry out their work.
3.2	Understand the nature and priorities of the organisation they work in	3.2	Understand the nature and priorities of the organisation they work in
3.3	Understand the organisational 'values', where their role fits in the organisation and the different areas of the organisation that they need to work with	3.3	Explain their organisational 'values',
		3.4	Explain where their role fits in the organisation and the different areas of the organisation that they need to work with.
4.1	Understand the products and services offered to customers by their organisation	4.1	Explain the products and services offered to customers by their organisation
4.2	Understand in detail the products and services that they support	4.2	Explain the products and services that they support
4.3	Understand how their role supports the delivery of these products and services.	4.3	Explain how their role supports the delivery of these products and services.
5.1	Understand the systems, tools and processes used in the role	5.1	Evidence their ability to use the systems, tools and processes used in their role
5.2	Understand the standards to be met in using these systems and processes	5.2	Explain the standards to be met in using these systems and processes
5.3	Understand the consequences of not following processes and when to raise concerns if errors are made.	5.3	Explain the consequences of not following processes and when to raise concerns if errors are made.

6.1	Provide service to customers in line with organisational standards, values and regulatory requirements	6.1	Exemplify the ability to provide service to customers in line with organisational standards, values and regulatory requirements
6.2	Carry out the range of tasks required in the role to the standards required, using the required systems and processes	6.2	Exemplify how they carry out the range of tasks required in the role to the standards required, using the required systems and processes
6.3	Contribute to individual and team objectives, in line with organisational policy	6.3	Exemplify how they contribute to individual and team objectives.
6.4	Demonstrate a willingness to work positively with customers	6.4	Exemplify how they have worked positively with customers
7.1	Organise their own accounts, completing tasks to required organisational deadlines	7.1	Exemplify how they their own accounts, completing tasks to required deadlines
7.2	Track individual customer accounts where necessary, taking appropriate action	7.2	Exemplify how they track individual customer accounts where necessary and take appropriate action
7.3	Take ownership through to completion, escalating when required	7.3	Exemplify how they have taken ownership through to completion, escalating when required
8.1	Consistently support colleagues / collaborate to achieve results	8.1	Exemplified where they have consistently support colleagues / collaborate to achieve results
8.2	Build/maintain good working relationships within teams and with other business areas where necessary	8.2	Exemplify how they have built/maintained good working relationships within their team and with other business areas where necessary
8.3	Demonstrate awareness of their own role in the team and the impact on others	8.3	Explain their role in the team and the impact on others
9.1	Communicate effectively with customers/colleagues, using sound interpersonal skills, a range of media and appropriate language	9.1	Demonstrate how they communicate effectively with customers/ colleagues in different ways, e.g. by email and verbally.
9.2	Build good relationships with customers, recognising their relationship with and their importance to the organisation while dealing with a potentially difficult topic	9.2	Exemplify how they have built good relationships with customers while dealing with a potentially difficult topic
9.3	Adapt their style to that of the customer and actively listen to understand their needs	9.3	Exemplify how they have adapted their style to that of the customer and listened actively to understand their needs
9.4	Handle difficult and sensitive situations professionally when they occur, working to support and retain a positive relationship with the customer	9.4	Exemplify how they have handled difficult and sensitive situations professionally when they occur, working to support and retain a positive relationship with the customer
10.1	Work with customers to identify mutually acceptable solutions to credit issues, within organisational guidelines	10.1	Exemplify how they work with customers to identify mutually acceptable solutions to credit issues.

11.1	Identify opportunities to improve work practices	11.1	Identify opportunities to improve work practices
11.2	Successfully implement changes that are required	11.2	Successfully implement changes that are required
12.1	Seek feedback and act on it to improve their performance	12.1	Evidence how they have sought feedback and acted on it to improve their performance
12.2	Build their own capability through ownership of their own development, working with their manager	12.2	Evidence how they have built their own capability through ownership of their own development, working with their manager
12.3	Keep up to date with relevant changes	12.3	Evidence how they have kept up to date with relevant changes
13.1	Demonstrate integrity and ethical behaviour in the way they do their job	13.1	Demonstrate integrity and ethical behaviour in the way they do their job
13.2	Treat sensitive information in a confidential way	13.2	Exemplify how they have treated sensitive information in a confidential way
14.1	Adapt to changing business needs effectively	14.1	Exemplify how they have adapted to changing business needs effectively
14.2	Support others in adapting to changing business needs	14.2	Exemplify how they have supported others in adapting to changing business needs
14.3	Re-prioritise work as required	14.3	Evidence how they have re-prioritise work as required
15.1	Display energy and enthusiasm, staying positive when under pressure	15.1	Evidence how they have displayed energy and enthusiasm, staying positive when under pressure
15.2	Deal objectively with setbacks when they occur, learning for the future	15.2	Evidence how they have dealt objectively with setbacks when they occur, learning for the future
15.3	Support others when setbacks occur, sharing learning with others	15.3	Evidence how they have supported others when setbacks occur, sharing learning with others

Appendix D

Ofqual Level 2 level descriptors

The following summarises the level of achievement required to a Level 2 qualification:

Knowledge and understanding	<ul style="list-style-type: none">• Use understanding of facts, procedures and ideas to complete well-defined tasks and address straightforward problems.• Interpret relevant information and ideas.• Be aware of the types of information that are relevant to the area of study or work.
Application and action	<ul style="list-style-type: none">• Complete well-defined, generally routine tasks and address straightforward problems.• Select and use relevant skills and procedures• Identify, gather and use relevant information to inform actions.• Identify how effective actions have been.
Autonomy and accountability	<ul style="list-style-type: none">• Take responsibility for completing tasks and procedures.• Exercise autonomy and judgement subject to direction or guidance as needed.
Summary Level 2	<p>Achievement at Level 2 reflects the ability to select and use relevant understanding, ideas, skills and procedures to complete well-defined tasks and address straightforward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.</p>

Useful contacts

CICM Apprenticeship, qualifications and benefits of CICM membership	www.cicm.com
Apprenticeship standard and assessment plan from	www.instituteforapprenticeships.org
CICM End-point Assessment Organisation	+44 (0)7817 727272 EPA@@cicm.com
CICM membership advice	+44 (0)1780 722903 cicmmembership@cicm.com
Accounts department	T: +44 (0)1780 722908

Chartered Institute of Credit Management

End-point Assessment Organisation
Chartered Institute of Credit Management
The Water Mill, Station Road
South Luffenham, OAKHAM
LE15 8NB. ENGLAND

Chartered Institute of Credit Management

The Chartered Institute of Credit Management (CICM) is the largest recognised professional body in the world for the credit management community. Formed over 75 years ago, the Institute was granted its Royal Charter in 2014. Representing all areas of the credit and collections lifecycle, it is the trusted leader and expert in its field providing its members with support, resources, advice, and career development as well as a networking and interactive community. In addition to its comprehensive suite of qualifications and learning opportunities, events and magazine 'Credit Management', the CICM administers the Prompt Payment Code for BEIS. Independently, and through collaboration with business organisations, it provides vital advice to businesses of all sizes on how best to manage cashflow and credit.