

# COLLECTIONS (AR) SPECIALIST

## Insights to Job Fit

**SAMPLE REPORT**  
Friday, March 27, 2026

## INTRODUCTION

The **Customer Collections Specialist Assessment** was designed to provide a deeper understanding of an individual's fit for success in a customer collections role. The assessment delivers insight across multiple dimensions that are critical for building long-term customer relationships, influencing outcomes, and achieving performance goals.

This assessment evaluates four key competencies that collectively define success in customer collections and collections position:

### Evaluation Categories

-  **Job Fit**  
Evaluates prior experience and practical knowledge related to customer interactions, follow-up, and resolution processes
-  **Business Acumen**  
Evaluates understanding of business impact, customer value, and decision-making in a retail environment
-  **Work Style**  
Assesses the ability to influence, communicate value, and guide customers toward positive decisions
-  **Retention Risk**  
Identifies factors that may indicate challenges related to engagement, stability, or long-term role fit

## HOW TO USE THIS REPORT

The **Customer Collections Specialist Assessment Report** is designed to help hiring managers and leaders make better decisions about selection, onboarding, and coaching by providing a structured view of how well a candidate or employee aligns with the demands of the role.

The report should be used as a decision-support tool — not as a single pass/fail test — by reviewing each section to understand strengths, potential gaps, and development opportunities.

When combined with interviews, experience, and performance data, the assessment helps improve hiring accuracy, reduce turnover, and long-term success in a customer collections role.

## CRS Attribute Competencies



## SCORES AND RANKINGS

Scores for Overall Rating, each Section, and individual Competencies are categorized into three levels:

**Highly Developed** – Denoted in **Green**, indicates an aboveaverage score or top percentile of benchmarked scores.

**Moderately Developed** – Denoted in **Orange**, indicates a score in the middle percentile of benchmarked scores.

**Needs Development** – Denoted in **Red**, indicates a competency or skill that you might consider for further improvement. This score falls in the bottom range of benchmarked scores.

## Key Indicators of Performance to Measure



### Customer Interaction Ability

Can they manage difficult conversations with skill and composure?



### Collections Experience

Have they done this work — or something directly adjacent?



### Structured Execution

Do they plan their work and consistently hit their targets?

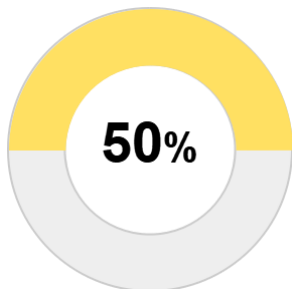


### Career Alignment

Are they genuinely motivated for this role — and planning to stay?

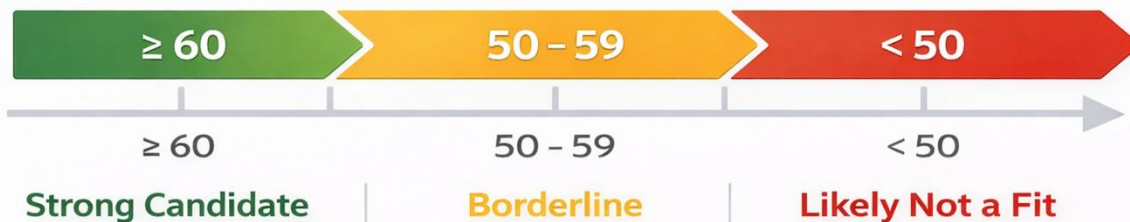
## RESPONDENT OVERALL SCORE

A composite score representing a total for each of the nine sections and expressed as a percentage of the total possible points is given below.



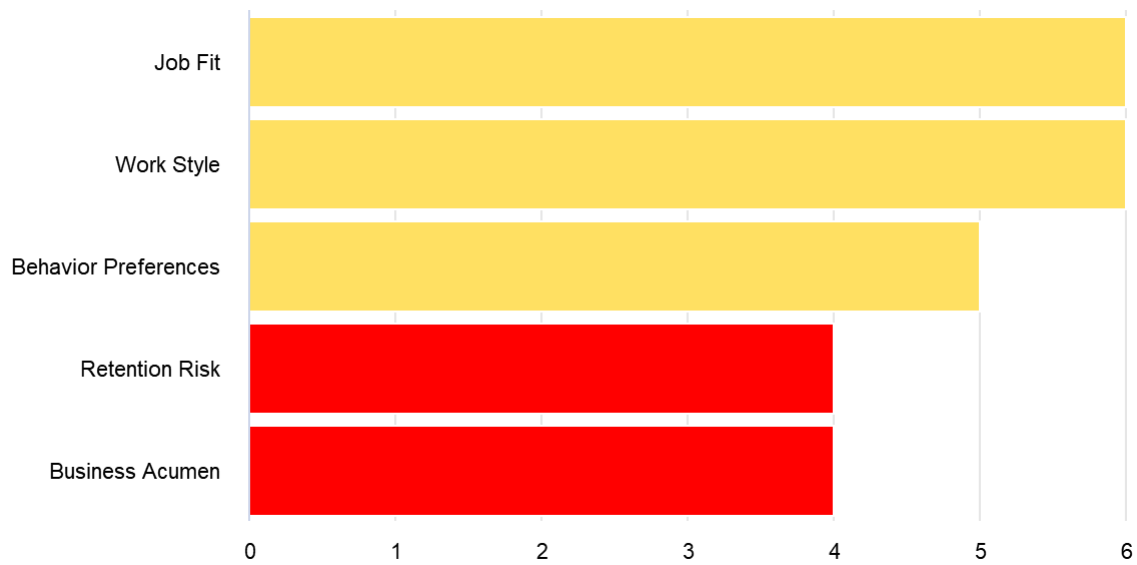
Assessment

$\geq 60$	50 - 59	$< 50$
<b>Strong Candidate</b>	<b>Borderline</b>	<b>Likely Not a Fit</b>
High probability of Good CRS performance. Proceed with confidence to interview stage.	Requires additional evaluation. Use structured interview layer to assess gaps before deciding.	Low predicted performance. Strong signal to pass unless mitigating factors are identified.



## COLLECTIONS SECTION SCORES

Looking in more detail, the report that follows depicts a summary of scores generated from the answers provided in each of the sections and specific competencies that make up the assessment.



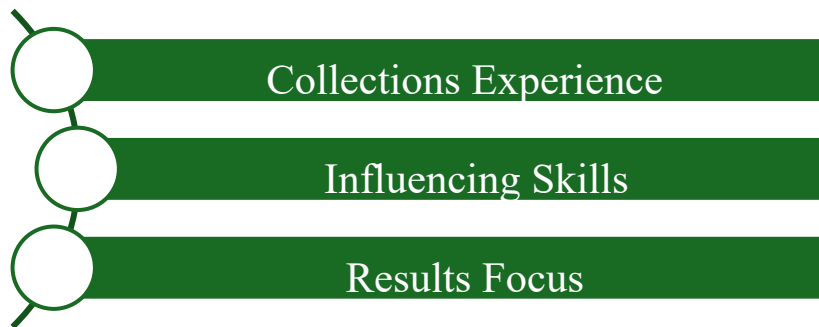
## COMPETENCY PROFILE

Below is a summary of each of the competencies evaluated in the four sections of the assessment. Percentile scores for each rating indicate the current level of development for that competency. Competencies highlighted in green show a highly developed ability, while those highlighted in yellow or red indicate the possible need for further improvement.



## JOB FIT

This section of the report shows the level of development related to the ability to do the job. The breakout of responses is categorized into three sub-groups as follows:



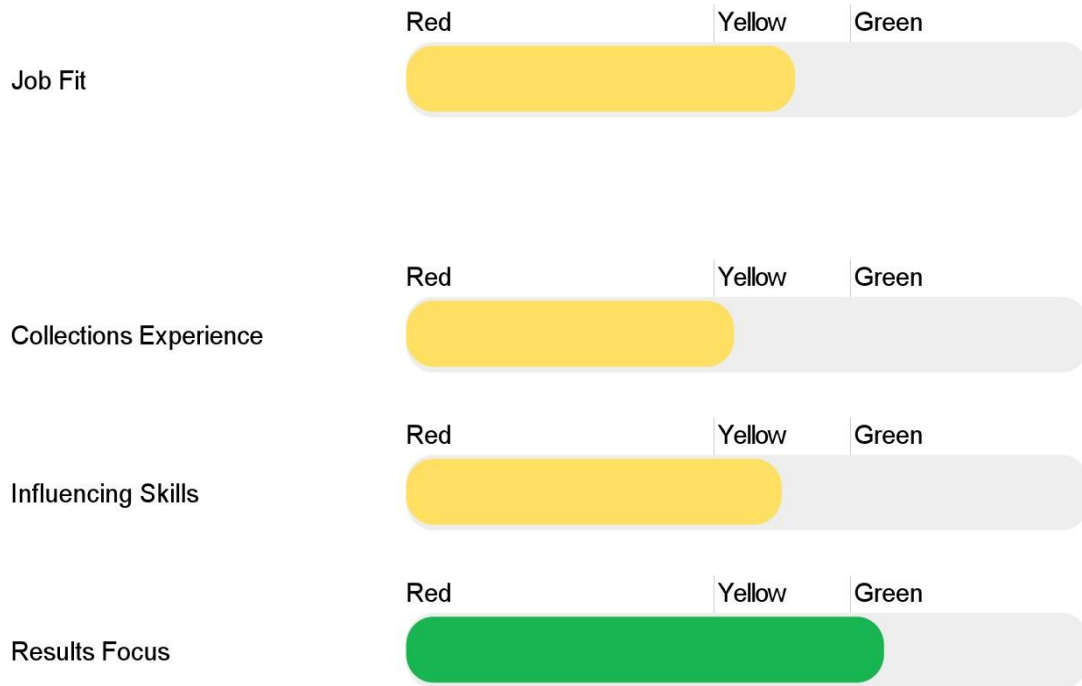
**Collections Experience** - This subsection evaluates the individual's practical experience and comfort level with core collection activities such as account follow-up, payment discussions, and managing customer balances. It reflects how well the person understands collection processes, applies appropriate techniques, and maintains organization when managing multiple accounts.

**Influencing Skills** - This subsection measures the ability to communicate effectively and guide customer conversations toward positive outcomes. It focuses on how well an individual listens, addresses concerns, builds trust, and frames solutions in a way that encourages cooperation and commitment. Individuals who demonstrate strength in influencing skills are often able to reduce resistance, improve customer engagement, and increase the likelihood of successful payment arrangements or collections outcomes.

**Results Focus** - This subsection assesses the individual's drive to achieve performance goals and maintain consistent follow-through. It reflects motivation, persistence, and accountability in completing tasks and meeting expectations. A strong results focus suggests the ability to remain productive under pressure, track progress, and stay committed to achieving measurable outcomes while maintaining quality customer interactions.

## JOB FIT

This section of your report shows the development level of each competency associated with Collections Experience.



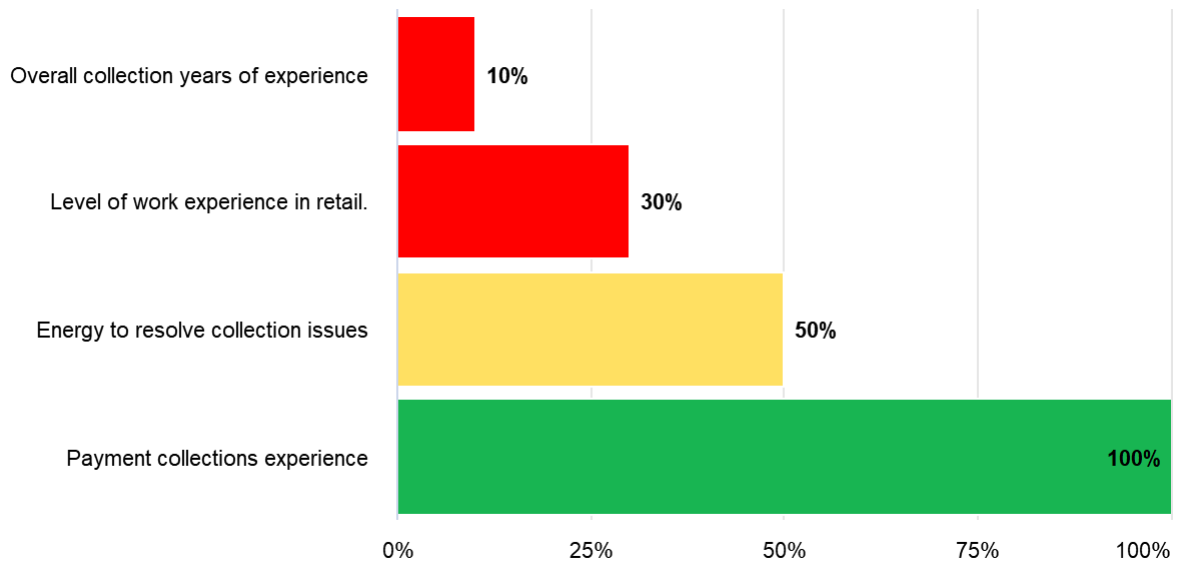
## COLLECTIONS EXPERIENCE

The **Collections Experience** results summarize how effectively an individual handles core collections responsibilities such as customer follow-up, payment solutions, account organization, and professional communication. Higher scores suggest strong practical experience and confidence in managing accounts while maintaining customer relationships, while lower scores indicate a need for additional training or coaching. Overall, this section helps the reader understand a candidate's readiness to succeed in a real-world collection's environment.

### OVERALL SCORE



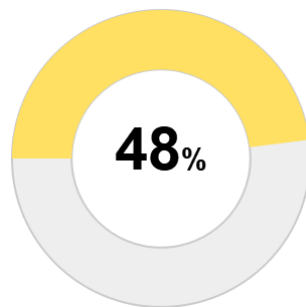
### QUESTION SCORE



## COLLECTIONS EXPERIENCE RATING

**Dennis has a Collections Experience Score that falls in the Moderate Range of scores.**

Individuals in the moderate range generally show some experience with customer billing, payment discussions, or follow-up activities but may not yet demonstrate consistent confidence or structure in a collections environment. They often possess strong intentions and customer service awareness but can vary in persistence, organization, or effectiveness when conversations become challenging. With clear expectations, coaching, and skill development focused on consistency and negotiation confidence, individuals in this range can improve their overall collections effectiveness.



Collections Experience

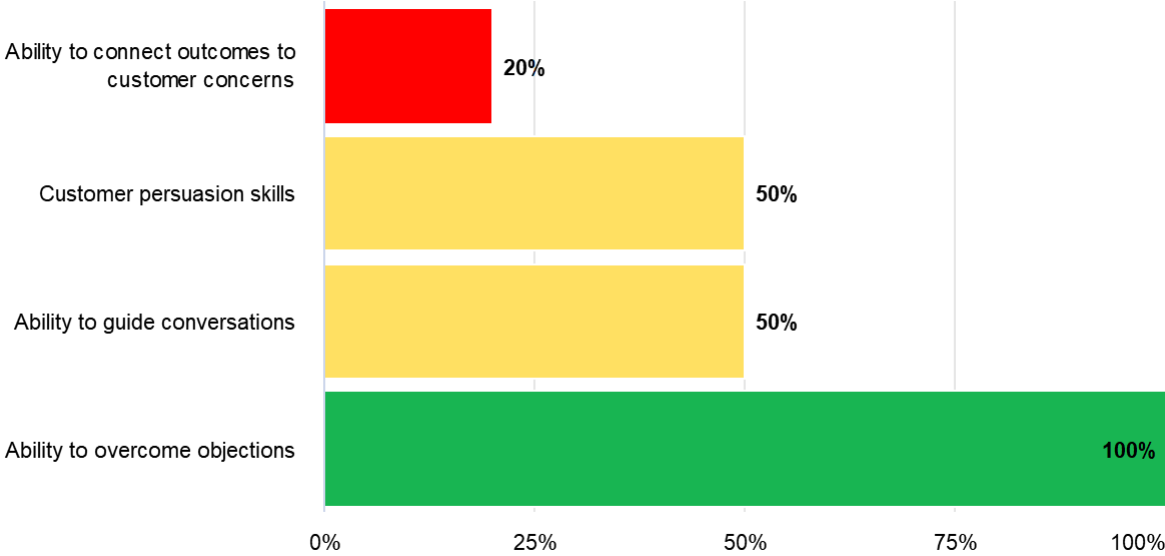
# INFLUENCING SKILLS

The **Influencing Skills** results summarize how effectively an individual guides customer decisions through communication, empathy, and persuasive problem-solving. Higher scores suggest strong ability to build trust, address concerns, and encourage positive outcomes while maintaining professional relationships, while lower scores indicate an opportunity to strengthen communication strategies and confidence in influencing conversations. Overall, this section helps the reader understand a candidate’s ability to positively shape customer behavior in a real-world collections' environment.

## OVERALL SCORE



## QUESTION SCORE



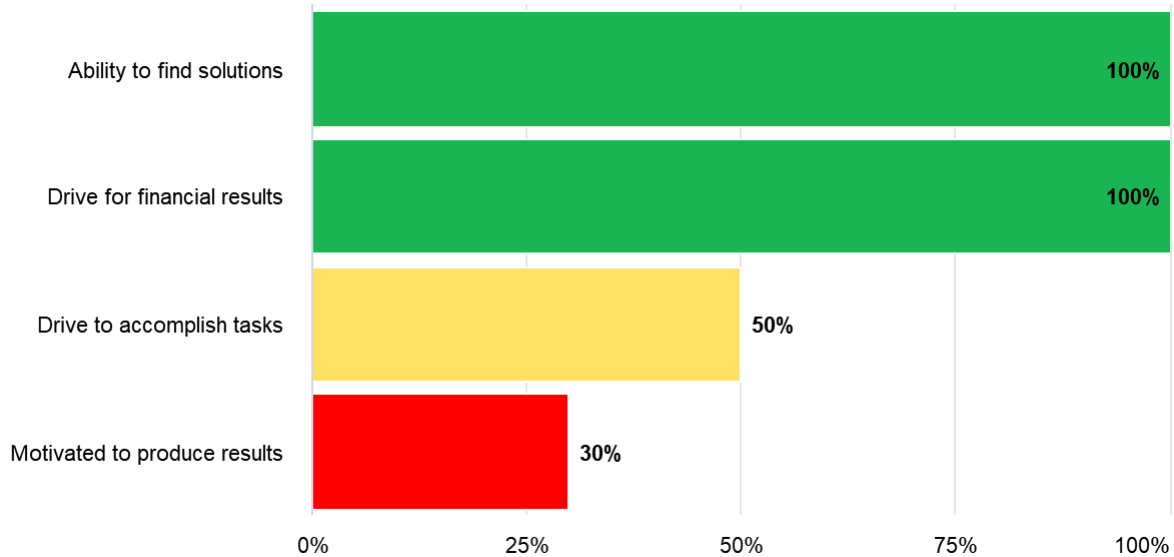
## RESULTS FOCUS

The **Results Focus** results summarize how effectively an individual prioritizes outcomes, maintains accountability, and works toward performance goals within a collections environment. Higher scores suggest strong motivation to achieve targets, maintain follow-through, and stay focused on measurable results, while lower scores indicate an opportunity to strengthen goal orientation, consistency, and performance discipline. Overall, this section helps the reader understand a candidate’s ability to drive productive outcomes and meet expectations in a real-world collections’ environment.

### OVERALL SCORE



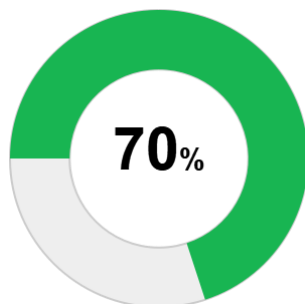
### QUESTION SCORE RANK



## RESULTS FOCUS RATING

### **Dennis has a Results Driven Score that falls in the High Range.**

Individuals in the high range demonstrate a strong focus on achieving outcomes and meeting performance expectations. They are typically motivated by goals, maintain a steady sense of urgency, and take ownership of results. They tend to stay focused on priorities, follow through on commitments, and persist through obstacles to achieve desired outcomes. Their performance orientation supports consistent productivity and aligns well with roles that require measurable results.



Results Focus

## BUSINESS ACUMEN

This section of the report shows the level of development related to business acumen. The breakout of responses is categorized into three sub-groups as follows:



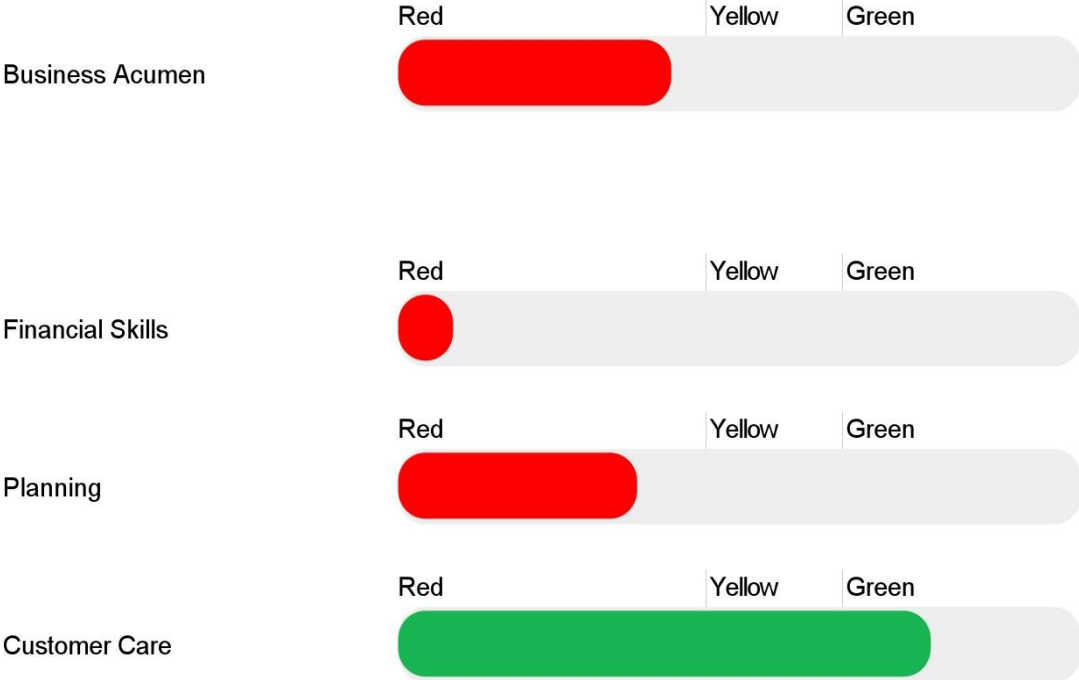
**Financial Skills** – This subsection evaluates the individual’s ability to understand and apply basic financial concepts related to collections activities, including payment allocation, balance tracking, and numerical accuracy. It reflects how comfortable the person is working with account details, interpreting financial information, and making sound decisions that support both customer solutions and company objectives.

**Planning** – This subsection measures the individual’s ability to organize work, prioritize responsibilities, and manage time effectively within a collection’s environment. It focuses on how well a person structures follow-up activities, anticipates next steps, and maintains consistency when handling multiple accounts or deadlines.

**Customer Care** – This subsection assesses the individual’s ability to balance collections responsibilities with a customer-focused approach. It reflects empathy, professionalism, and the ability to maintain respectful and supportive interactions while addressing payment challenges. Strong customer care results typically indicate an individual who can preserve relationships, reduce customer frustration, and create positive experiences while still supporting collection and collections objectives.

## BUSINESS ACUMEN

This section evaluates how effectively an individual applies practical business understanding within a collections and customer collections environment. It focuses on the ability to interpret financial information, plan and organize work activities, and make decisions that balance customer needs with company objectives.



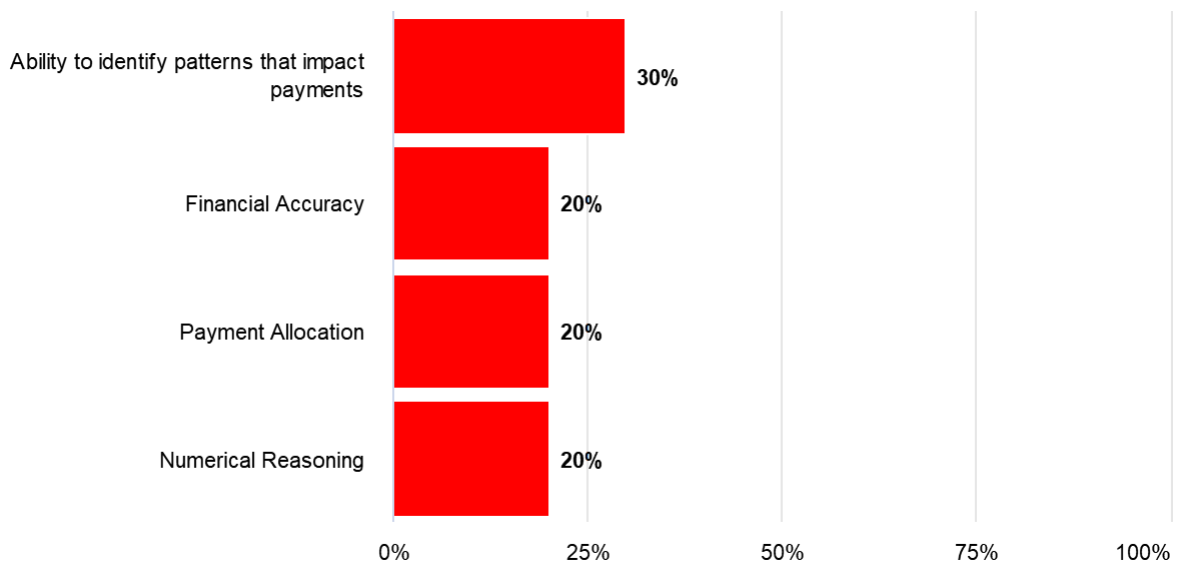
## FINANCIAL SKILLS

The **Financial Skills** question module measures an individual's ability to understand, interpret, and accurately work with financial information related to collections and customer account management. It evaluates comfort with numbers, attention to detail, and the ability to apply basic financial concepts such as balances, payment allocation, and account accuracy when making decisions.

### OVERALL SCORE



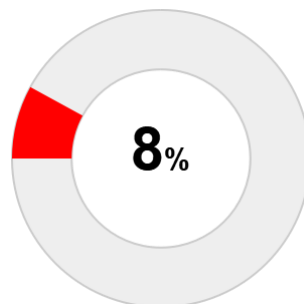
### QUESTION SCORE RANK



## FINANCIAL SKILLS RATING

**Dennis has a Financial Skills Related to Collections Score that falls in the Low Range.**

Individuals in the low range may have limited comfort or experience working with financial details related to payment tracking, account balances, or collection discussions. They may avoid financial conversations or struggle to clearly explain payment information, which can impact collection effectiveness. Structured training and coaching are typically needed to build confidence, improve numerical understanding, and support accurate communication in financially focused interactions.



Financial Skills

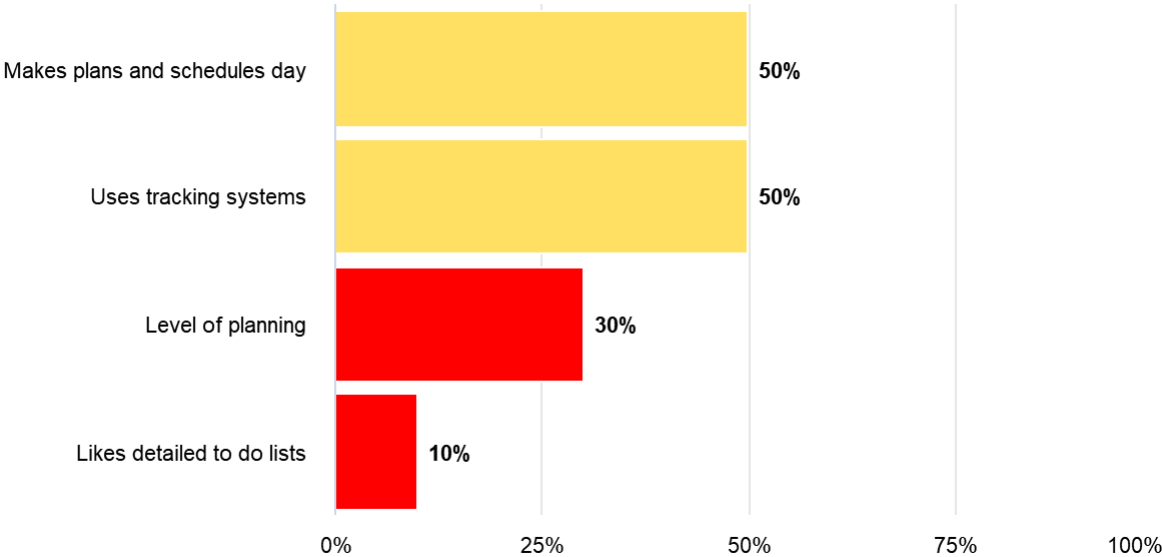
# PLANNING ABILITIES

The Planning Abilities questions module measures how well an individual organizes tasks, prioritizes responsibilities, and manages time to meet deadlines and performance expectations. Strong planning skills support consistent follow-through, reduce missed actions, and improve overall efficiency in a fast-paced work environment.

## OVERALL SCORE



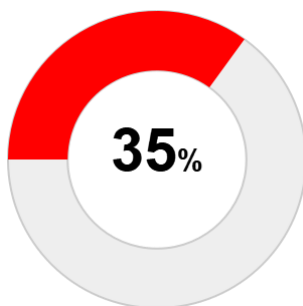
## QUESTION SCORE RANK



## PLANNING ABILITIES RATING

**Dennis has a Planning Skills Score that falls in the Low Range.**

Individuals in the low range may have difficulty organizing tasks, prioritizing responsibilities, or maintaining consistent follow-through. They can become reactive rather than proactive, which may lead to missed follow-ups or inefficient workflow management. Strong structure, clear expectations, and ongoing coaching are often needed to help improve organization and establish effective planning routines.



Planning

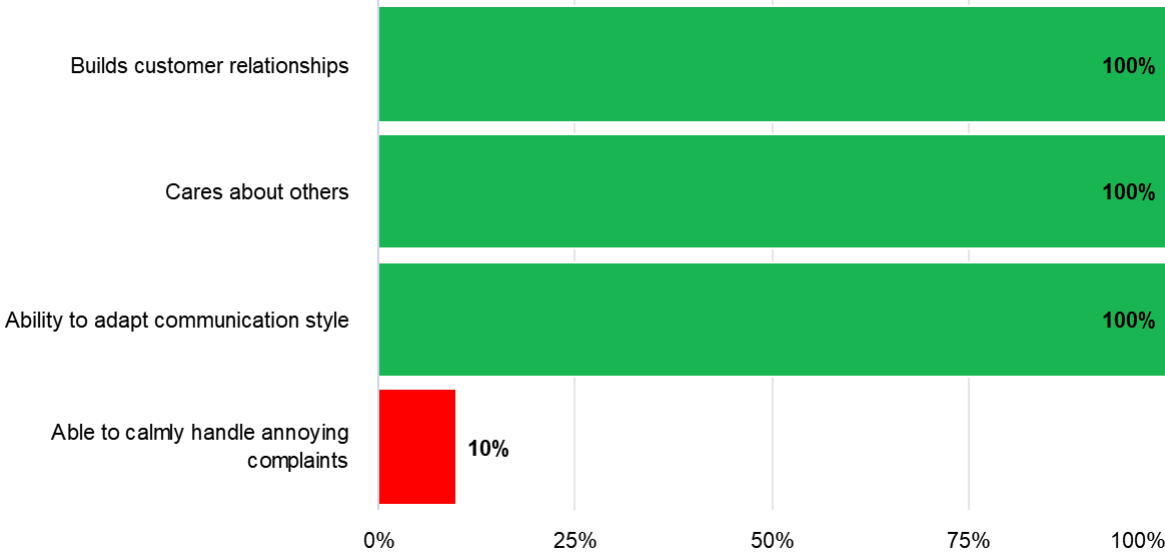
# CUSTOMER CARE

The Customer Care questions module measures how effectively an individual balances customer needs with company goals while maintaining professional and respectful interactions. Strong customer care skills support positive relationships, reduce conflict, and help create solutions that encourage customer cooperation and collections.

## OVERALL SCORE



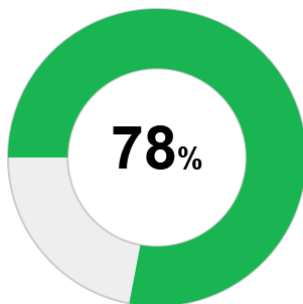
## QUESTION SCORE RANK



## CUSTOMER CARE RATING

**Dennis has a Customer Care Score that falls in the High Range.**

Individuals in the high range demonstrate a strong customer-focused mindset and are typically effective at building rapport, listening actively, and responding to customer needs with patience and professionalism. They show empathy while maintaining appropriate boundaries and are skilled at creating positive interactions that support long-term customer relationships. Their communication style helps strengthen trust and contributes positively to collections outcomes.



Customer Care

## WORK STYLE

This section of the report shows the development level of skills related to how an individual approaches daily responsibilities, including their consistency, decision-making habits, and focus on achieving goals. This section helps explain how a person organizes work, responds to challenges, and maintains steady performance within a structured work environment.



**Decision Making** – This subsection measures how an individual approaches choices, solves problems, and responds to situations that require judgment. It reflects the balance between speed and accuracy, confidence in making decisions, and the ability to evaluate options before taking action.

**Goal Setting** – This subsection assesses the individual's ability to establish priorities, focus on objectives, and maintain motivation toward completing tasks. It reflects how clearly a person defines targets, tracks progress, and stays committed to achieving outcomes over time. Strong goal-setting tendencies are often associated with higher accountability, persistence, and consistent performance.

## WORK STYLE

This section of your report summarizes the key components of an individual's behavior and tendencies related to decision making and goal setting.



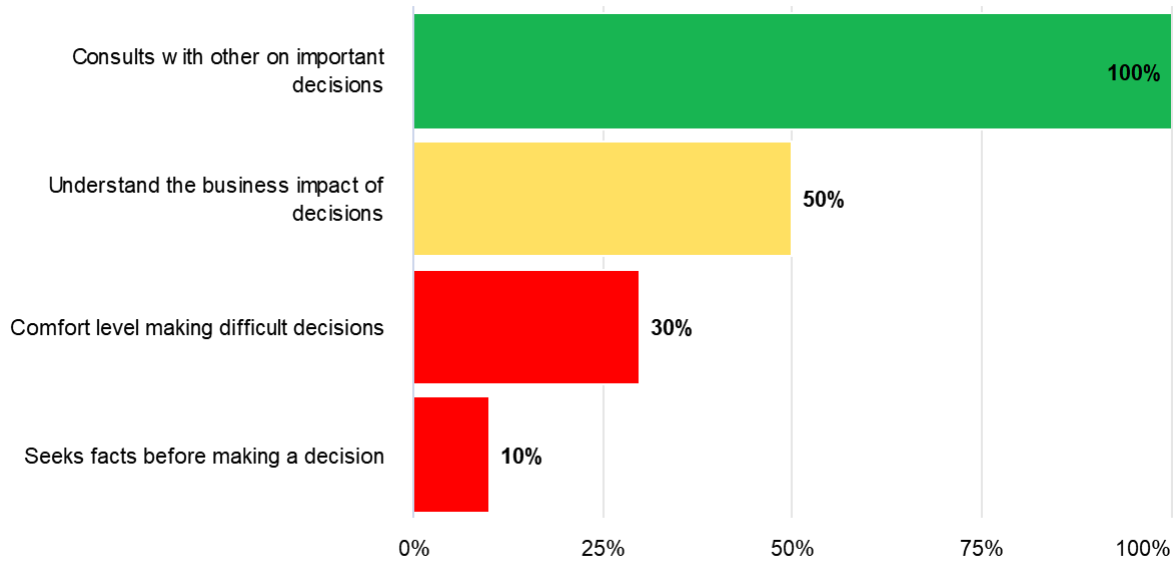
## DECISION MAKING

Decision Making reflects how an individual evaluates information, weighs options, and chooses a course of action in everyday work situations. Strong decision-making skills support sound judgment, confidence, and the ability to respond effectively to challenges while maintaining consistent performance.

### OVERALL SCORE



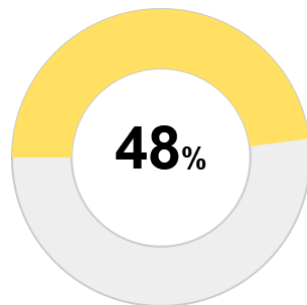
### QUESTION SCORE RANK



## DECISION MAKING RATING

**Dennis has a Decision Making Score that falls in the Moderate Range.**

Individuals in the moderate range generally make sound decisions but may vary in confidence or speed depending on the complexity of the situation. They often prefer gathering sufficient information before acting and may occasionally seek reassurance when faced with unclear or challenging choices. With experience and clear guidelines, they can strengthen decisiveness while maintaining thoughtful judgment and consistency.



Decision Making

## GOAL SETTING

The Goal Setting questions module measures how effectively an individual establishes priorities, defines objectives, and stays focused on achieving results. Strong goal-setting skills support accountability, consistent follow through, and sustained performance over time.

### OVERALL SCORE



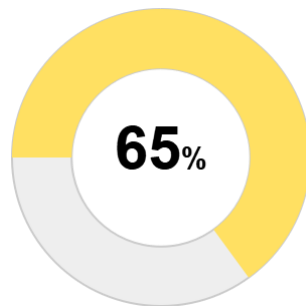
### QUESTION SCORE RANK



## GOAL SETTING RATING

**Dennis has a Goal Setting Score falls in the Moderate Range.**

Individuals in the moderate range generally show an understanding of goals and performance expectations but may vary in consistency when creating or tracking objectives. They often perform well when goals are clearly defined by others but may need occasional structure or encouragement to maintain momentum. With coaching and clearer performance metrics, they can strengthen their ability to set priorities and sustain focus on longer-term outcomes.



Goal Setting

## COLLECTIONS RISK

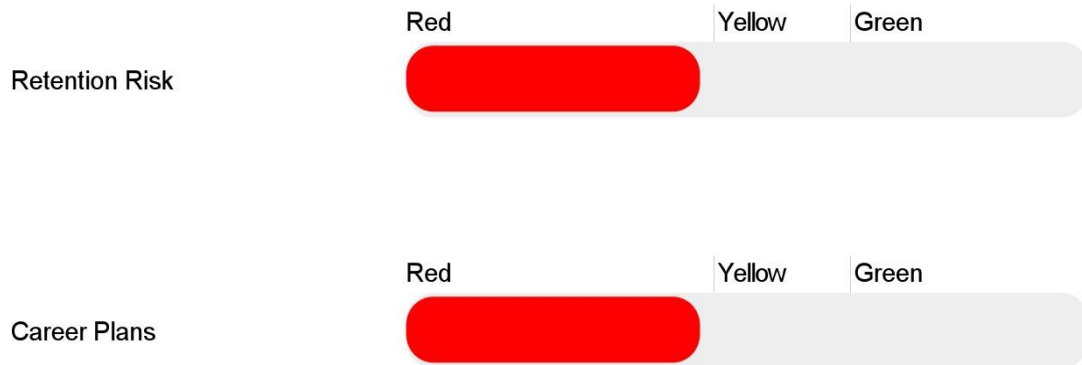
This section provides insight into factors that may influence an individual's long-term stability, engagement, and likelihood to remain in the role. This section helps identify patterns related to career direction, stress management, and confidence that can impact overall collections and performance consistency.



**Career Plans** – This subsection reflects how clearly an individual sees their future direction and long-term commitment to their role or career path. Clear career plans often support stronger engagement, motivation, and collections. Individuals with well-defined career goals are typically more likely to stay focused and invest in ongoing development.

## COLLECTIONS RISK

This section of your report provides insight into factors that may influence an individual's long-term stability, engagement, and likelihood to remain in the role. This section helps identify patterns related to career direction, stress management, and confidence that can impact overall collections and performance consistency.



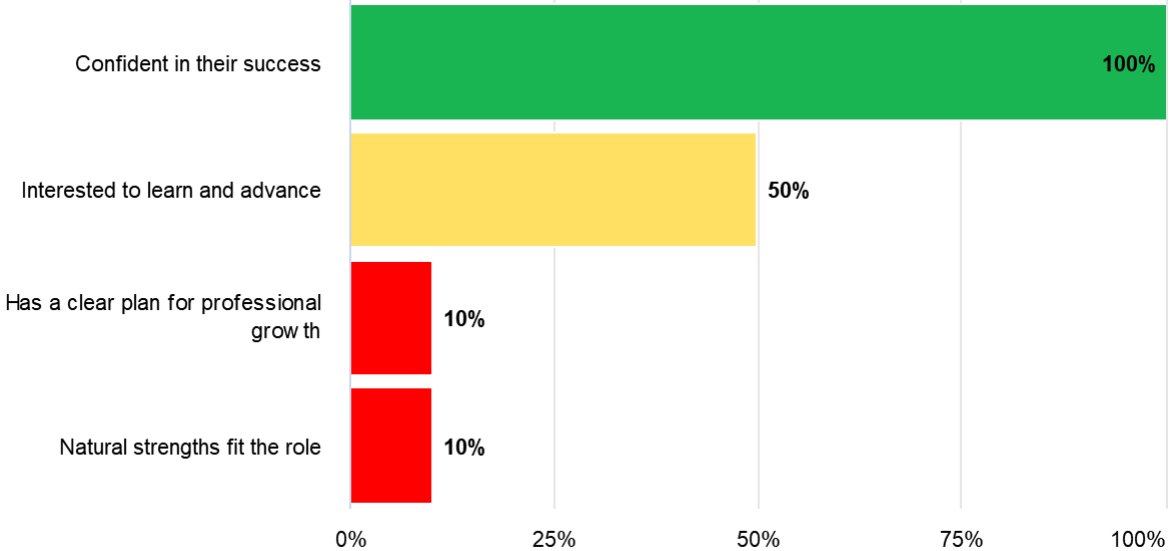
# CAREER PLANS

This section reflects how clearly an individual identifies their future goals and level of commitment to their current career path. Strong career direction often supports higher engagement, motivation, and long-term collections in the role.

## OVERALL SCORE



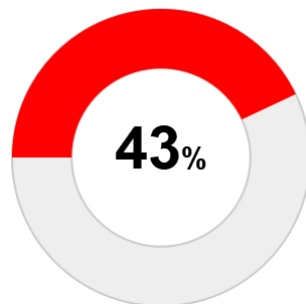
## QUESTION SCORE RANK



## CAREER PLANS REPORT

**Dennis has a Career Plans Score that falls in the Low Range.**

The low range indicates limited long-term interest in the role or industry or expresses career goals that are unrelated to the position. They may view the job as temporary or transitional, increasing the risk of early turnover. They demonstrate unclear direction, limited commitment to growth within the organization, or low motivation to invest in long-term development.



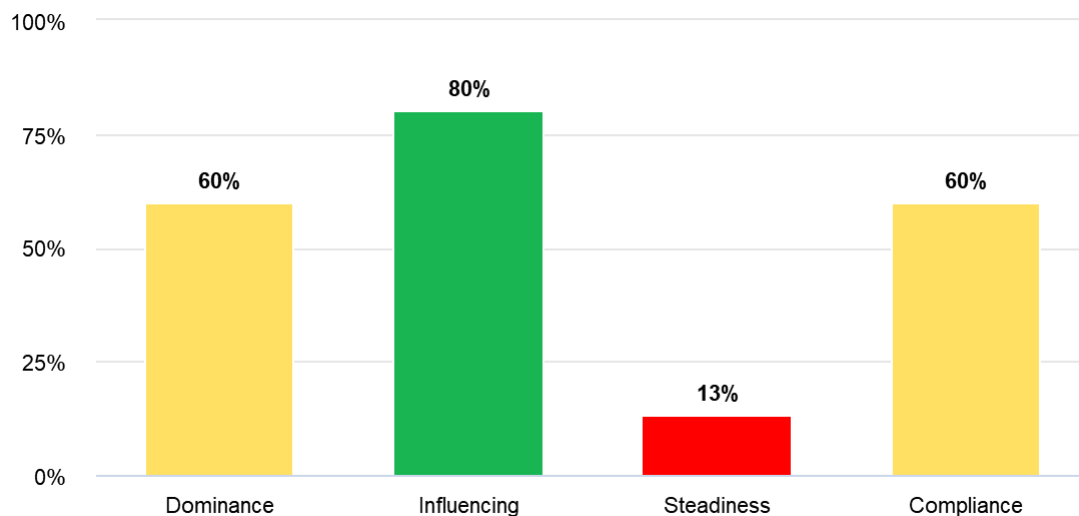
Career Plans

## DISC PROFILE

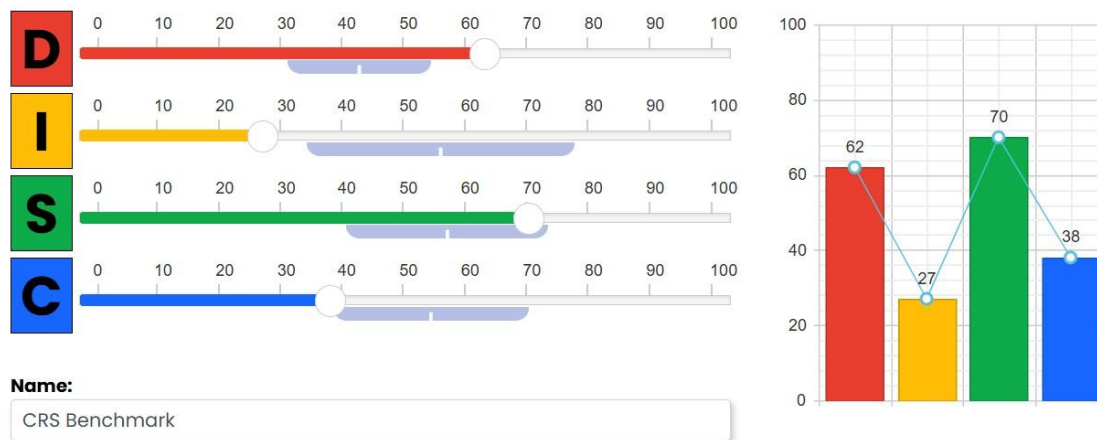
A **DISC profile** is a behavioral assessment that helps describe how a person tends to act, communicate, and respond to others in work and everyday environments. The model groups observable behavior into four primary styles — **Dominance (D)**, **Influence (I)**, **Steadiness (S)**, and **Compliance (C)**.

DISC does not measure intelligence, skills, or personality traits; instead, it focuses on **behavioral tendencies** — how people naturally approach tasks, relationships, and challenges. Understanding a DISC profile helps individuals and organizations improve communication, teamwork, leadership, and role fit by recognizing behavioral strengths, potential blind spots, and how different styles interact.

### DISC Profile: **SAMPLE REPORT**



## DISC Benchmark Profile



The DISC profile shown reflects a behavioral pattern well aligned with the demands of a **Customer Collections Specialist (COLLECTIONS)** role.

The highest score appears in **Steadiness (S)**, indicating a patient, calm, and supportive approach to customer interactions. Individuals with this pattern tend to listen carefully, remain composed under pressure, and build trust through consistent follow-through — all critical strengths when working with customers who may be frustrated or uncertain.

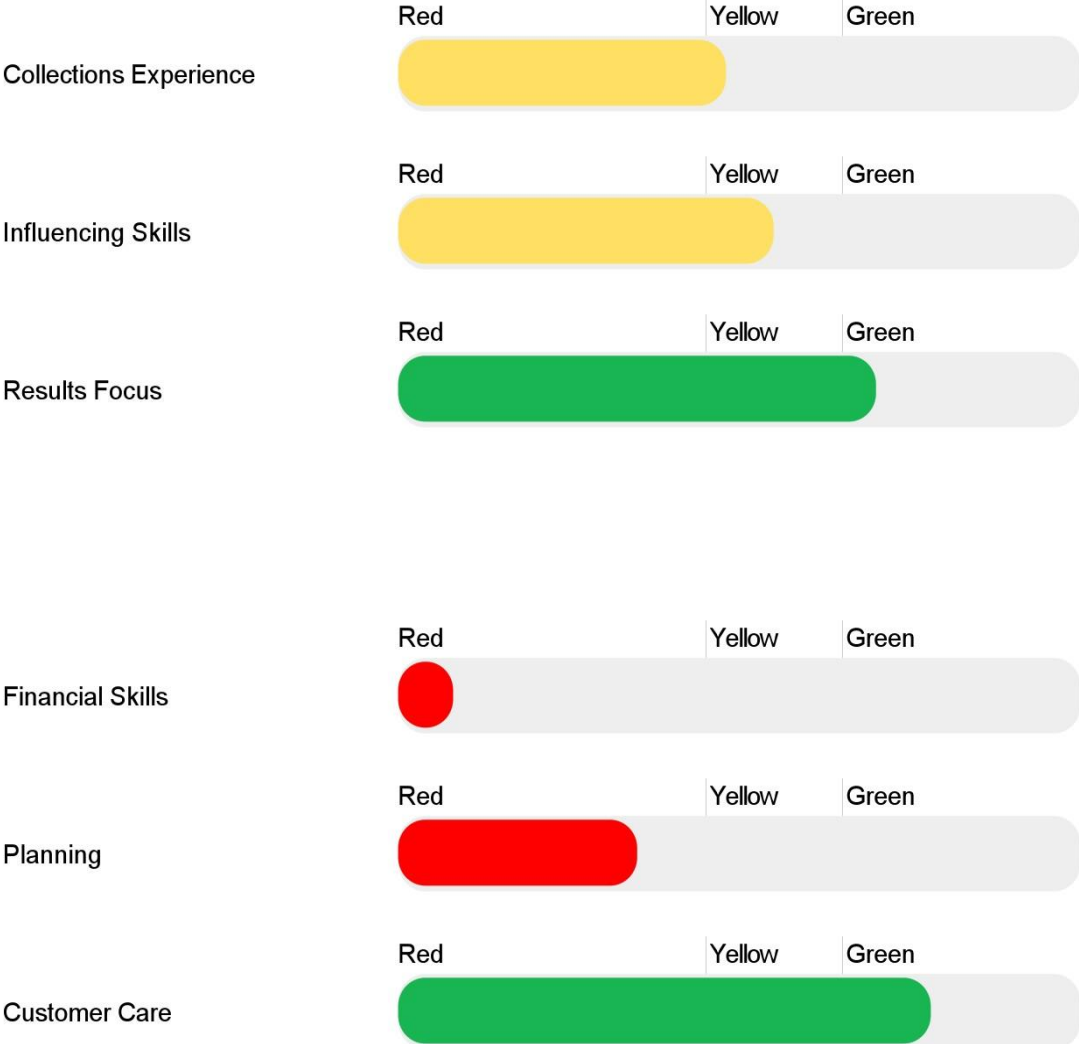
The **Dominance (D)** score is moderate, suggesting a balanced level of assertiveness. This allows the individual to guide conversations, move toward resolution, and maintain focus on outcomes without appearing overly forceful or aggressive.

The **Conscientiousness (C)** score is moderately low to moderate, reflecting flexibility and an ability to adapt to changing situations rather than relying heavily on strict rules or rigid processes.

The lower **Influence (I)** score indicates a communication style that is more reserved and practical than highly expressive or outgoing. Rather than using high energy or persuasion through enthusiasm, this profile tends to influence customers through patience, logic, consistency, and genuine support.

### SUMMARY OF COMPETENCIES

The following summary chart provides a high-level overview of the assessment results across the Collections four core competency areas: **Job Fit, Business Acumen, Work Style, and Collections Risk.** Together, these categories offer a balanced view of how well an individual’s background, behavioral tendencies, and workplace approach aligns with the expectations of the role. The chart is intended to give readers a quick visual snapshot of strengths, development opportunities, and areas that may require additional attention or support.





## Defining the Ideal Collections Applicant

Based on the BenchmarkPro model findings, a strong COLLECTIONS performer attributes can be described with some precision. The attributes below should be used to guide further evaluation and structured interview design.

### Core Strengths

Key strengths that drive consistent CRS performance:

-  **Customer-Capable**  
Demonstrates confidence and competence in managing customer interactions, including difficult or high-stakes conversations
-  **Collections-Ready**  
Has relevant hands-on experience in collections or a closely related field — the second-strongest predictor in the model
-  **Structurally Disciplined**  
Plans their work, sets clear goals, and follows through — the execution backbone of consistent CRS performance
-  **Career-Motivated**  
Has a clear sense of professional direction and aligns their intent with the demands and growth path of the CRS role

### **An Important Note About Exploring This Report.**

The assessment data provides a structured way to better understand how an individual's strengths, work style, and skill tendencies align with the demands of the role. By reviewing results across multiple sections, the reader can identify patterns that suggest where a person is likely to perform well and where additional support or development may be beneficial. These insights help move beyond first impressions by offering objective information that supports more informed hiring, coaching, and development decisions.

When evaluating job fitness, it is important to consider how the different competency areas work together rather than focusing on any single score. For example, strong results in communication or customer care may complement moderate technical skills, while high results focus may help offset weaker planning habits when supported by structure. Looking at the overall profile provides a clearer understanding of how a person may function in real-world situations and interact with customers, teammates, and performance expectations.

At the same time, assessment results should be viewed as a snapshot of the individual at one specific point in time. People grow, gain experience, and adapt to new environments, and their responses may change as their skills and confidence develop. The assessment is designed to provide insight and direction, not to serve as a final or absolute prediction of future performance.

For the most accurate understanding of a person's interests, potential, and fit to the job, assessment data should always be combined with information from multiple sources. Interviews, experience, reference feedback, performance history, and ongoing observation all contribute to a more complete picture. When used alongside these additional inputs, assessment becomes a powerful tool for making balanced decisions and supporting long-term employee success.

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