

# Job Match Form

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**Collection Agent**



**Employment Technologies**  
CORPORATION

Dear Participant,

This questionnaire is being used to verify the key behaviors and skills required to effectively perform as a Collection Agent. **The information you provide will be used for research purposes only and will remain confidential.** Information on this survey will be reported to Employment Technologies Corporation, a human resources firm. This survey will not be retained in any personnel file and should not be confused with any official personnel documents.

Filling out this survey will take approximately 5 to 10 minutes. Once you have completed the survey, please return it to your administrator.

Thank you for your cooperation.

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Please check the appropriate box:

***Your current job title or position***

- Collector (Entry-level)
- Collector (Mid-level)
- Collector (Upper-level)
- Supervisor/Manager
- Human Resources/Training
- Other (specify) \_\_\_\_\_

***Gender***

- Female
- Male

***Age***

- Under 40
- 40 or above

***Ethnic background***

- African American (Black)
- Asian/Pacific Islander
- Caucasian (White)
- Hispanic
- Native American/Alaskan Native
- Other (please specify) \_\_\_\_\_



**Part I: Please read each statement below and check the box that best describes how essential it is to overall job performance in the Collection Agent position.**

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	<b>Job Behavior</b>	<b>Essential to the job</b>	<b>Somewhat essential to the job</b>	<b>Not essential to the job</b>
1.	Places outbound calls to contact consumers regarding their debts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Performs skip-tracing activities when necessary to locate consumers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Adheres to legal regulations regarding call restrictions (e.g., when, where, and how many times a collector may call).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Answers incoming calls from consumers to discuss debts, answer questions, and make payment arrangements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Reviews consumer account information in computer databases to facilitate the collection strategy (e.g., notes from previous calls, financial information, account balance, existing settlement offers).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Leaves messages for consumers when unable to reach them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	When speaking to someone other than the debt holder, complies with legal regulations regarding the amount and type of debt information that can be disclosed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	When speaking to the debt holder, completes an identity verification process to ensure proper identity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.	Informs the consumer of the debt, the amount of the debt, and that payment is due.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	If the consumer disputes the debt, identifies the reasons for the dispute (e.g., fraud, dissatisfaction with product or service).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	If the consumer disputes the amount of the debt, identifies what portion of the debt the consumer is disputing (e.g., finance charges).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.	Responds to objections, disputes, and stalls to persuade the consumer to pay the debt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13.	Uses all available resources (e.g., address databases, copies of bills) to prove to the consumer that the debt is valid.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.	Persuades consumers to pay debts by explaining the benefits of paying and the consequences of not paying.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.	Negotiates debt reduction if necessary to obtain payment, ensuring that the debt reduction stays within account guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16.	Questions consumers regarding income and expenses to determine debt payment feasibility and arrange a payment plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**Part I Continued:**

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	<b>Job Behavior</b>	<b>Essential to the job</b>	<b>Somewhat essential to the job</b>	<b>Not essential to the job</b>
17.	Works with consumers to identify potential sources to satisfy the debt (e.g., personal savings, insurance, special programs).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18.	Determines details of the payment plan with the consumer, including the payment method, timing, amount, and number of payments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.	Obtains agreement from the consumer regarding everything discussed on the call.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20.	Documents the results of the call, including any payment arrangements that were agreed upon.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21.	Updates consumer's contact information to facilitate future communication (e.g., phone numbers, address, place of employment).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22.	Transfers calls to another collector or supervisor when appropriate to diffuse the consumer, continue the discussion, and improve the chances of collecting the debt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.	When consumer insists that the debt is fraudulent, informs consumer of fraud documentation procedures and notes this status in the account.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.	Contacts consumers to follow up on payments that were promised but not received.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.	Communicates with companies who are refinancing debt for a consumer (e.g., finance companies, mortgage companies) to facilitate debt payment arrangements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.	Attends meetings and/or reviews e-mails to stay informed of company-related issues (e.g., company policies, new accounts or clients).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27.	Reviews group and/or individual performance reports to improve collection strategies and track performance towards collection goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.	Supports team members as necessary by answering questions, training newer team members, and taking calls from consumers who have previously worked with another team member.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**Part II: Please read the definition for each skill listed below. Check the box that best describes how essential the skill is to overall job performance in the Collection Agent job.**

Skill	Essential to the job	Somewhat essential to the job	Not essential to the job
1. <b>Ability to Learn and Apply Procedures</b> – Understanding new job-related information (e.g., company policies, legal regulations, client-specific information), correctly recalling and applying that information during calls, and offering solutions that remain within guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. <b>Active Listening</b> – Listening attentively to understand the consumer's point of view, allowing consumers to vent, refraining from interrupting, asking probing questions to discern the facts, and paying attention to subtle cues (e.g., consumer's voice tone, demeanor).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. <b>Adaptability</b> – Adjusting collection techniques based on the individual circumstances of each consumer while still maintaining overall call flow, responding appropriately to different personality types, and quickly adapting to changes in policies or procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. <b>Communication</b> – Expressing information in a confident and clear manner without rambling, speaking in a pleasant tone and volume, using effective voice inflection, and preparing clear and concise written summaries.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. <b>Developing Rapport</b> – Treating consumers with respect, displaying empathy for personal situations, conveying an attitude of helpfulness, and diffusing irate consumers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. <b>Multitasking</b> – Quickly and accurately performing multiple tasks simultaneously (e.g., talking, listening, locating, reviewing, and documenting information) while managing the pace of a call and maintaining focus on the consumer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. <b>Persuasion</b> – Effectively responding to objections and arguments, being assertive rather than aggressive, creating a sense of urgency, conveying firm expectations, being persistent, and negotiating with consumers to reach a mutually acceptable agreement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. <b>Problem Solving</b> – Using available tools to accomplish tasks, identifying ways to overcome barriers and objections, evaluating all relevant pieces of information, and understanding the advantages and disadvantages of various options.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. <b>Professionalism</b> – Maintaining composure even when dealing with difficult consumers, keeping a positive attitude in spite of negative outcomes, maintaining control of calls, and avoiding the use of slang terms or jargon.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. <b>Work Ethic</b> – Taking initiative on work tasks and responsibilities, working at a steady pace, striving to meet and exceed personal and organizational work goals, and exhibiting reliable and dependable behavior.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. <b>Data Entry</b> – Using a keyboard/mouse to quickly and accurately enter words and/or numbers into the appropriate fields of data entry forms or databases.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. <b>Composition</b> – Reviewing customer correspondence and resource information; writing articulate, complete, accurate, and customer-focused responses that enhance customer relationships.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. <b>Typing/Keyboarding</b> – Quickly and accurately keying text or data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Part III: Please review the definitions for each skill listed above. Check the box below that best describes the percentage of the Collection Agent job covered by these skills.**

- 81 to 100%   
 61 to 80%   
 41 to 60%   
 21 to 40%   
 0 to 20%