BILLING AND REVENUE MANAGEMENT



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Introduction

Billing and Revenue Management Training Course builds the operational and control discipline that turns delivered services into collected cash. Billing sits between operations and finance: it depends on accurate service records, correct pricing, and clean master data, and its failures show up as disputes, credit notes, revenue leakage, and strained customer relationships. This course covers the whole billing chain. It covers pricing setup, invoice generation, revenue recognition, and collections linkage. Furthermore, it applies revenue assurance, billing reconciliation, dispute management, and internal controls. In addition, it develops revenue analytics, leakage detection, and performance measurement. As a result, participants run a billing function that is accurate, controlled, and efficient.

Billing and Revenue Management Course Objectives

- Explain the billing lifecycle from order to cash collection.
- Configure pricing, tariffs, and billing rules accurately.
- Generate invoices with correct data, timing, and formatting.
- Apply revenue recognition principles to billed and unbilled revenue.
- Reconcile billed revenue with recorded revenue and cash.
- Detect and prevent revenue leakage across the billing chain.
- Manage disputes, credit notes, and billing adjustments.
- Apply segregation of duties and authorisation controls to billing.
- Apply tax treatment and e-invoicing requirements to billing.
- Measure billing performance using operational and financial indicators.

Course Methodology

- Interactive lectures with real billing and revenue assurance cases.
- Billing lifecycle mapping and pricing setup workshops.

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- Revenue reconciliation and leakage detection exercises.
- Dispute handling and credit note processing practice.
- Structured peer review with facilitator feedback on control improvements.

Who Should Take This Course

- Billing and revenue operations staff.
- Accounts receivable and revenue accountants.
- Finance controllers and shared services staff.
- Revenue assurance and compliance analysts.
- Billing system and process owners.
- Internal auditors reviewing billing controls.

Billing and Revenue Management Course Outlines

Day 1: The Billing Lifecycle and Master Data

- Billing lifecycle from order capture to cash collection.
- Customer master data, contracts, and service records.
- Product catalogue and pricing table structure.
- Billing frequency, cycles, and cut-off rules.
- Interfaces between operations, systems, and finance.
- Roles and responsibilities in the billing process.
- Case study: mapping a billing process and its failure points.

Day 2: Pricing, Rating, and Invoice Generation

- Tariff and pricing configuration principles.

- Rating, discounts, and promotional treatment.
- Metering, usage capture, and consumption data.
- Invoice generation, formatting, and delivery channels.
- Pre-billing validation and exception handling.
- Adjustment, proration, and retroactive pricing.
- Workshop: configuring pricing and running a pre-billing check.

Day 3: Revenue Recognition and Reconciliation

- Revenue recognition timing for billed services.
- Billed versus unbilled revenue and accrual treatment.
- Deferred revenue and contract liability handling.
- Reconciliation of billed revenue to the general ledger.
- Billing to cash reconciliation and unallocated receipts.
- Contract asset and receivable classification.
- Workshop: reconciling billed revenue against recorded revenue.

Day 4: Revenue Assurance, Leakage, and Disputes

- Revenue assurance framework and coverage mapping.
- Leakage sources: missing billing, wrong pricing, unbilled usage.
- Detection techniques and control testing routines.
- Dispute logging, root cause analysis, and resolution workflow.
- Credit notes, write-offs, and approval thresholds.
- Segregation of duties and authorisation controls.
- Workshop: investigating a revenue leakage incident.

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Day 5: Tax, Reporting, and Performance Management

- Tax treatment of billed services and VAT application.
- E-invoicing requirements and compliance considerations.
- Billing performance indicators and dashboards.
- Days sales outstanding and collection linkage.
- Reporting to management and revenue committees.
- Automation, system integration, and continuous improvement.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Billing and Revenue Management, participants will gain a thorough understanding of the billing lifecycle, pricing and invoice generation, revenue recognition and reconciliation, revenue assurance and leakage control, dispute management, tax treatment, and billing performance measurement. They will also acquire practical skills in billing lifecycle and master data management, pricing, rating and invoice generation, revenue recognition and reconciliation, and revenue assurance, leakage control and dispute management. In addition, the course prepares them to run a billing function that protects revenue and satisfies audit. Gentex Training Center delivers this programme with a strong focus on practical process execution and measurable revenue protection.

FAQs for Billing and Revenue Management course

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Q1 What is the "Billing and Revenue Management" course about?

It is a five-day programme on running the billing function accurately and protecting billed revenue. It covers the billing lifecycle and master data, pricing and invoice generation, revenue recognition and reconciliation, revenue assurance and leakage detection, dispute and credit note handling, tax treatment, and billing performance measurement.

Q2 What are the key benefits of the "Billing and Revenue Management" course?

Participants stop losing revenue to billing errors and process gaps. The course reduces leakage from missing or mispriced billing, improves invoice accuracy and first-time-right rates, speeds dispute resolution, tightens revenue reconciliation, strengthens controls over adjustments and credit notes, and improves billing performance visibility for management.

Q3 What skills will I gain from the "Billing and Revenue Management" course?

Participants gain billing lifecycle and master data management, pricing, rating and invoice generation, revenue recognition and reconciliation, and revenue assurance, leakage control and dispute management. These four skills cover the practical core of billing and revenue management work.

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Q4 What tools, methods, or standards are covered in the "Billing and Revenue Management" course?

The course covers the billing lifecycle from order capture to cash collection, customer master data and contract records, product catalogue and pricing table structure, billing frequency and cut-off rules, system interfaces between operations and finance, tariff and pricing configuration, rating and discount treatment, metering and usage capture, invoice generation and delivery channels, pre-billing validation, proration and retroactive pricing, revenue recognition timing for billed services, billed versus unbilled revenue treatment, deferred revenue and contract liabilities, billed revenue to general ledger reconciliation, billing to cash reconciliation, unallocated receipt resolution, contract asset and receivable classification, revenue assurance frameworks and coverage mapping, leakage detection across missing billing, wrong pricing and unbilled usage, control testing routines, dispute logging and root cause analysis, credit note and write-off approval thresholds, segregation of duties matrices, authorisation controls, VAT treatment of billed services, e-invoicing requirements, billing performance indicators, days sales outstanding analysis, and system integration and automation.

Q5 How is the "Billing and Revenue Management" course applied in real-world practice?

Participants apply the methods to their own billing operations. They review master data and pricing setup, run pre-billing validation checks, reconcile billed revenue against the ledger and cash, investigate leakage incidents, clear disputes and process credit notes, monitor billing performance indicators, and prepare evidence for audit review. Many leave with a pre-billing checklist, a revenue reconciliation template, and a leakage detection control matrix ready to use.