



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Client Profitability Information Gathering and Reporting

Services / Transport, Operations and Logistics

Unit Standard 252258 · NQF Level 4 · 4 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills to systematically gather, analyse, and report on client profitability data. Participants will learn to identify profitable client segments, assess cost-to-serve, and present actionable insights to support strategic decision-making within the organisation.

Category	Services
Subfield	Transport, Operations and Logistics
Unit Standard	252258
Accreditation	SAQA Accredited · NQF Level 4 · 4 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply systematic methods to gather client profitability data from internal and external sources.
- Analyse client profitability using cost allocation, revenue contribution, and margin analysis techniques.
- Evaluate client profitability trends and identify key drivers of profitability variance.
- Design client profitability reports that meet stakeholder information needs and organisational standards.
- Implement recommendations based on profitability insights to improve client portfolio performance.
- Demonstrate ethical and compliant handling of confidential client financial information.

WHO SHOULD ATTEND

- This course is designed for finance professionals, business analysts, account managers, and anyone responsible for client profitability analysis and reporting in a corporate or consulting environment.

COURSE OUTLINE

Day 1: Fundamentals of Client Profitability Data and Reporting

- Introduction to client profitability: definition, benefits, and challenges
- Data sources: financial statements, job costing systems, CRM data
- Data gathering techniques: direct observation, interviews, document review
- Key profitability metrics: gross margin, net margin, contribution margin
- Analytical tools: cost allocation, activity-based costing overview
- Report structure: executive summary, findings, recommendations
- Ethical considerations: confidentiality, accuracy, and bias
- Practical case study: extracting data from sample records

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **4 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 12,800.00	R 12,800.00
1	In-House	R 16,600.00	R 16,600.00
1	On-Campus (Pretoria)	R 19,200.00	R 19,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	03 Aug 2026	On-Campus	Mauritius
04 Aug 2026	04 Aug 2026	On-Campus	Cape Town, South Africa
05 Aug 2026	05 Aug 2026	On-Campus	Dubai, UAE
06 Aug 2026	06 Aug 2026	On-Campus	Pretoria, South Africa
06 Aug 2026	06 Aug 2026	On-Campus	Lagos, Nigeria
07 Aug 2026	07 Aug 2026	On-Campus	Johannesburg, South Africa
10 Aug 2026	10 Aug 2026	On-Campus	Cape Town, South Africa
11 Aug 2026	11 Aug 2026	On-Campus	Dubai, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 252258) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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