Reminder templates

Key considerations and updates to Debtor Daddy reminder updates for COVID-19

# Key considerations

* Even if your cash is tight, try to take a long term view, how will your customers remember your response 6 months from now?
* In good time and bad, building rapport and connection paves the way to payment and long term relationships.
* In your reminders prioritise opening communication lines first, rather than only focusing on getting paid.
* Consider switching from weekly to fortnightly reminders to reduce inbox overload and stress.
* Consider switching from per-invoice reminders to “account reminders” that combine all invoices into a single reminder showing all invoices, due and overdue (this is a new Debtor Daddy feature available on request).
* Send reminders manually, instead of automatically, so you can decide who to remind on a case by case basis.
* For customers that are not responding, consider picking up the phone or sending an SMS to ‘check in’. Prioritise their welfare first, you’ll soon learn whether they’re in a position to pay their bills.

[Talk to a Debtor Daddy AR Specialist](https://debtordaddy.com/covid-19/?utm_source=covid_templates&utm_medium=doc) to help you decide your approach and make these changes to your configuration.

# Regular workflow reminders

Regular workflow reminders send one reminder per invoice. If you want to combine all invoices into one reminder then use the Smart Workflow option below.

## Reminder 1

|  |
| --- |
| **Can you help re invoice {invoice.number} for {invoice.amount} from {my.org\_name}** |
| Dear {contact.first\_name, fallback="valued customer"},  We appreciate that COVID-19 is a challenging time for all of us and understand it might be difficult for you to pay this invoice.  **If you are able to pay {invoice.number} for {invoice.amount} in the next day or so, we’d greatly appreciate it.**  If that’s not possible, please reply to this email ASAP so we can discuss alternative arrangements.  Your priority response in this matter will greatly assist our business continuity planning for the coming weeks.  Much appreciated.  {my.org\_name} |

## Reminder 2

|  |
| --- |
| **RE {my.org\_name} invoice {invoice.number} for {invoice.amount} (2nd notice)** |
| As above (only the subject changes) |

## Reminder 3

|  |
| --- |
| **RE {my.org\_name} invoice {invoice.number} for {invoice.amount} (3rd notice) - please respond** |
| As above (only the subject changes) |

## Reminder 4

Consider making a phone call or sending an SMS.

# Smart workflow reminders

Smart Workflows send reminders according to the oldest invoice in a customer’s account. Each reminder includes a summary of all invoices, due and overdue.

## Reminder 1

|  |
| --- |
| **Your account for {my.org\_name} – please respond** |
| Dear {contact.first\_name, fallback="valued customer"},  We appreciate that COVID-19 is a challenging time for all of us and understand it might be difficult for you to settle your account.  **If you are able to settle your account in the next day or so, we’d greatly appreciate it.**  If that’s not possible, please reply to this email ASAP so we can discuss alternative arrangements.  Your priority response in this matter will greatly assist our business continuity planning for the coming weeks.  An account statement follows.  Kind regards,  {my.org\_name}  {account.summary} |

## Reminder 2

|  |
| --- |
| **RE your account for {my.org\_name} (2nd notice)** |
| As above (only the subject changes) |

## Reminder 3

|  |
| --- |
| **Trying to get in touch re your account for {my.org\_name} – please respond ASAP** |
| ***You might consider adding a note at the top of the reminder asking them to contact you urgently via phone or email.***  Dear {contact.first\_name, fallback="valued customer"},  We’ve been trying to get hold of you regarding your account.  We appreciate that COVID-19 is a challenging time for all of us and understand it might be difficult for you to settle your account. However we do ask that you call us on XXXXXXXX or reply to this email – this will greatly assist our business continuity planning and ability to continue supporting our customers in the coming weeks.  Your account statement follows.  Kind regards,  {my.org\_name}  {account.summary} |