

FREE GUIDE

AR REMINDER WORKFLOW AND EMAIL TEMPLATES THAT REALLY WORK





SETTING YOURSELF UP FOR SUCCESS

Before you actually send any reminders, there are actions you can take to ensure they get the response you want.



USE A FAMILIAR SENDER NAME

We've all received emails from people and organisations we don't know. Sending reminders from your name or your company name will improve your email open rate. Especially if it's the name your customers are used to receiving emails from.



DON'T BE AFRAID TO GET PERSONAL

Personalising your overdue invoice reminder emails with the name and/or company name of your recipient can improve engagement with the email. This is especially true if you have a good relationship with whoever receives your reminders.



INCLUDE A CALL TO ACTION

Whether you're making a phone call or sending an email, the goal is to get paid. Or, at the very least a promise to pay. Be clear about the action you want, whether that's confirming that payment has already been made, paying the full amount immediately or contacting you to agree a payment plan. An example of this is:

"Please reply to this email and advise when you will make payment so we can update our records."



TIMING

Be the squeaky wheel. This is important in raising your chances of getting paid. If your customer has gone silent, then appearing in their inbox regularly as soon as the invoice is overdue is key. You want to be at the top of their list to get paid, and if you're the one that's bugging them (in the nicest possible way) your chances are much better than another business that's on that same list but has only chased the invoice once.



GET INTO THE RIGHT FLOW

Timing is key when it comes to a workflow that gets results. Prompting your customer about their account at well-timed intervals goes a long way to getting paid faster.

Below is a basic reminder workflow to get you started. If you want to get more sophisticated or have customer segments which need slightly different communications you can break these out and add in SMS reminders, calls, switch between plain text and html emails and tweak timings to suit. We've also got a whole guide dedicated to creating your AR perfect process which you can download [here](#).

TIMING	PURPOSE	TONE
2 days before due date	Prompt for customers to contact if there will be any issues making payment	Friendly
7 days after due date	Keep communication open between you and the customer. Understand if there are issues preventing payment.	Friendly
14 days after due date	Be the squeaky wheel. Make the customer aware you'll continue to contact them until payment has been made.	Firm
21 days after due date	Raise the urgency of the situation. Get paid confirmation from customer or agree a payment plan if required.	Urgent





EMAIL 1: INVOICE REMINDER BEFORE DUE DATE



WHEN TO SEND: This email should be sent two days prior to the due date.



PURPOSE OF THIS EMAIL: This email acts as a prompt for customers to get in touch if there are any issues which will prevent you from receiving payment on time. Whether it's a dispute about the goods or work received, or they just aren't going to be in a position to pay in full when due.

New message — ✖ ×

To

Subject **Friendly reminder from [YOUR COMPANY NAME]**

Dear [First name]

Just a friendly reminder that Invoice [INVOICE NUMBER] for [INVOICE AMOUNT] is due in two days.

Many thanks,

[Your full name]
[Your company name]

[BANK ACCOUNT / PAYMENT DETAILS / LINK TO INVOICE WITH PAY NOW BUTTON]

Send | 📎 | + 🗑️ | +



EMAIL 2: INVOICE REMINDER #1 POST DUE DATE



WHEN TO SEND: This email should be sent seven days after the due date.



PURPOSE OF THIS EMAIL: To keep the communication between you and your customer flowing. When payment is late it's all too easy for a customer to go to ground and ghost you. For the best chance of a successful outcome, you need to keep communicating and ideally understand why payment is late. During this initial period, communication is best kept firm, but light.

New message — ✕

To

Subject **Oops, did you forget?**

Dear [First name]

Our records indicate that we have not yet received payment for Invoice [INVOICE NUMBER] for [INVOICE AMOUNT]. It is seven days overdue.

If you have already paid please let us know. Otherwise, please reply to this email advising when you will make payment so we can update our records.

Much appreciated,

[Your full name]
[Your company name]

[BANK ACCOUNT / PAYMENT DETAILS / LINK TO INVOICE WITH PAY NOW BUTTON]

Send | 📎 | + 🗑️ | +



EMAIL 3: INVOICE REMINDER #2 POST DUE DATE



WHEN TO SEND: This email should be sent fourteen days after the due date.



PURPOSE OF THIS EMAIL: To be the squeaky wheel. You want to prompt your customer again for payment and give them another opportunity to talk to you if they're struggling to pay. Two weeks overdue, the tone should shift to be firmer than your previous email.

New message — ✕

To

Subject **Overdue invoice for [YOUR COMPANY NAME]**

Dear [First name]

Our records indicate that after sending a previous reminder, we have still not received payment for Invoice [INVOICE NUMBER] for [INVOICE AMOUNT]. It was due on [INVOICE DUE DATE] and is now 14 days overdue.

If you have already paid please let us know. Otherwise, please reply to this email and advise when you will make payment so we can update our records.

Much appreciated,

[Your full name]
[Your company name]

[BANK ACCOUNT / PAYMENT DETAILS / LINK TO INVOICE WITH PAY NOW BUTTON]

Send | 📎 | + 🗑️ | +



EMAIL 4: INVOICE REMINDER #3 POST DUE DATE



WHEN TO SEND: This email should be sent twenty-one days after the due date.



PURPOSE OF THIS EMAIL: To get payment. The tone should be firm and highlight the urgency of the situation.

New message — ↗ ✕

To

Subject **Urgent: Overdue invoice for [YOUR COMPANY NAME]**

[YOUR COMPANY LOGO]

Dear [First name]

Our records indicate that after sending multiple reminders we have still not received payment for Invoice [INVOICE NUMBER] for [INVOICE AMOUNT]. It was due on [INVOICE DATE] and is now 21 days overdue.

If you have already paid please let us know. Otherwise, please pay the invoice immediately.

Much appreciated,

[Your full name]
[Your company name]

[BANK ACCOUNT / PAYMENT DETAILS / LINK TO INVOICE WITH PAY NOW BUTTON]

Send | | ✕ |



EMAIL 5: CONFIRMING PAYMENT RECEIVED



WHEN TO SEND: This email should be sent once payment has been received.



PURPOSE OF THIS EMAIL: To strengthen your customer relationship. An easy to miss but important step is to thank your customer. Strengthening the relationship with your customer will help increase your chances of prompt payment and open communication in the future. If the customer is not someone you wish to work with in the future, you will need to remove the final statement in the email template.

New message — ✱ ×

To

Subject **Thanks, we've received your payment**



Dear [First name]

Just a quick note to say we have received your payment of [INVOICE AMOUNT] for Invoice [INVOICE NUMBER].

Thanks for making payment. We look forward to working with you again in the future.

Regards,

[Your full name]
[Your company name]

Send |  |  🗑️ | +

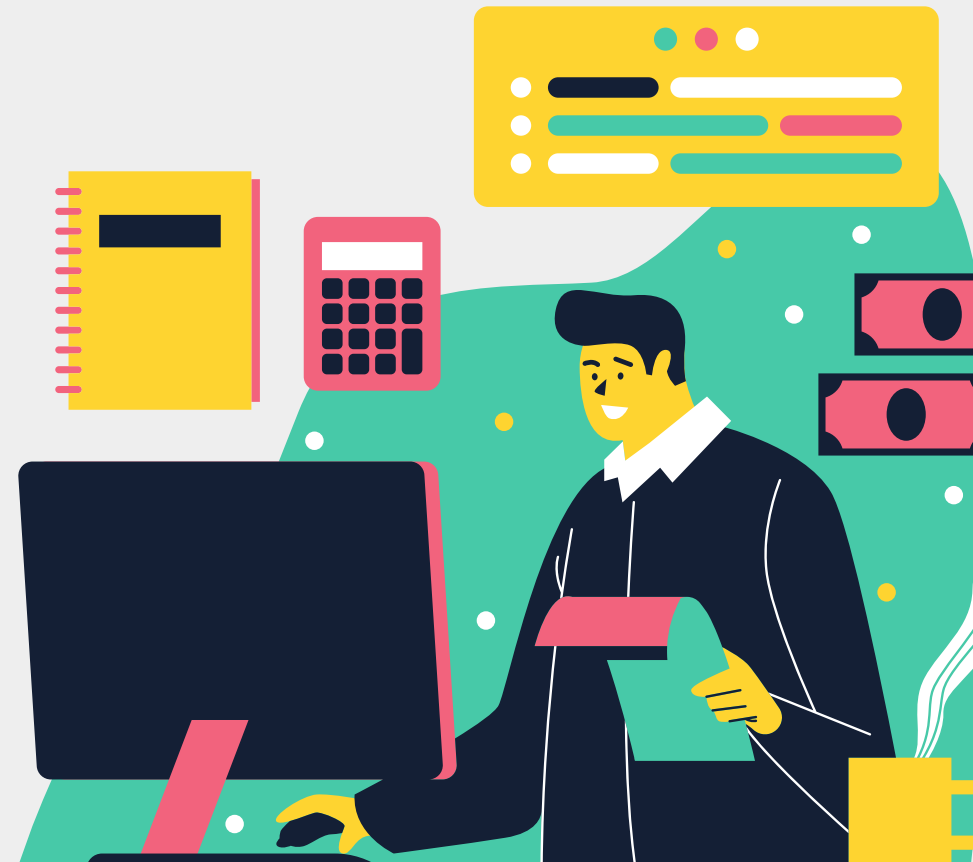


STILL WAITING TO BE PAID...

Four weeks have passed and you still haven't received payment. It's not the position you want to be in, but it does happen.

This is the time to shift up a gear and prepare a 'Letter of demand.' If you do end up at this crossroad, use our free template to write an effective, no-nonsense letter or email.

[GET FREE LETTER OF DEMAND TEMPLATE](#)





PUT YOUR AR ON AUTOPILOT

Sick of manual reminders and spreadsheets. Join hundreds of other businesses and let Debtor Daddy transform your accounts receivables. Say goodbye to mundane AR tasks, get paid faster and have more time for high value work.

[START YOUR FREE TRIAL NOW](#) >

[BOOK A DEMO](#) >



AUTOMATE THE REPETITIVE

- Automate SMS and email reminders
- Call queue assistant to make calling more efficient
- Dashboard for easy visibility of AR performance



FOCUS ON HIGH VALUE WORK

- Chase all accounts no matter how large or small
- Prioritise workload with filters
- Focus strategic work that needs the human touch



MAKE AR A POSITIVE EXPERIENCE

- Customers can pay directly from reminders
- Customers can easily raise disputes or issues paying
- AR teams see the impact they have on cashflow