


The FREE guide to help your collection team

Structure your business daily routine in 30 days, with our simple daily routine schedule



Monday	Tuesday	Wednesday	Thursday	Friday
<p>Your To-do's</p>				
<ul style="list-style-type: none"> <input type="checkbox"/> Review and update account holder details 	<ul style="list-style-type: none"> <input type="checkbox"/> Review and update account holder documentation (Credit application form and Surety documents) 	<ul style="list-style-type: none"> <input type="checkbox"/> Review and update account holder credit limit 	<ul style="list-style-type: none"> <input type="checkbox"/> Review and update account exposure 	<ul style="list-style-type: none"> <input type="checkbox"/> Create account holder categories
<p>The objective</p>				
<ul style="list-style-type: none"> ● Identify accounts with insufficient data ● Trace account holder detail if necessary 	<ul style="list-style-type: none"> ● CAF correctly completed and signed for collection purposes ● Surety correctly completed and signed for collection purposes 	<ul style="list-style-type: none"> ● Identify risk and opportunity 	<ul style="list-style-type: none"> ● Limit risk 	<ul style="list-style-type: none"> ● Segmentation of accounts for collection purposes
<p> What Jumping Fox Software offers you</p>				
<ul style="list-style-type: none"> ✓ Client detail report for immediate identification of outstanding account holder data ✓ Direct access to credit bureau for trace reports ✓ Bulk data update functionality 	<ul style="list-style-type: none"> ✓ Online application process ✓ Online approval process ✓ Access to update stakeholder details 	<ul style="list-style-type: none"> ✓ Access to credit bureau for credit report and credit scores ✓ System report on account holder probability of delinquency ✓ System report on risk assessment 	<ul style="list-style-type: none"> ✓ Payment predictions ✓ Access to credit bureau for report on account holder and surety assets ✓ Risk triggers 	<ul style="list-style-type: none"> ✓ Save account holder categories on system ✓ Collection reports on account categories

Monday

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Notes


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<p>Your To-do's</p>				
<ul style="list-style-type: none"> <input type="checkbox"/> Review delinquent account collection process 	<ul style="list-style-type: none"> <input type="checkbox"/> Review delinquent account collection process 	<ul style="list-style-type: none"> <input type="checkbox"/> Review collection KPI's 	<ul style="list-style-type: none"> <input type="checkbox"/> Review management reports 	<ul style="list-style-type: none"> <input type="checkbox"/> Review collection team tools
<p>The objective</p>				
<ul style="list-style-type: none"> ● Refine collection process for improved collection success rate 	<ul style="list-style-type: none"> ● Compliance with legislation and credit application terms and conditions 	<ul style="list-style-type: none"> ● Evaluate progress and performance 	<ul style="list-style-type: none"> ● Informed decision making 	<ul style="list-style-type: none"> ● Increase team efficiency
<p> What Jumping Fox Software offers you</p>				
<ul style="list-style-type: none"> ✓ Pre-set automated workflow according to business rules ✓ Edit workflow functionality 	<ul style="list-style-type: none"> ✓ Pre- drafted collection template documents (SMS & email) ✓ Knowledgebase (legal library) 	<ul style="list-style-type: none"> ✓ Dashboard to track KPI's ✓ Dashboard to track workflow success 	<ul style="list-style-type: none"> ✓ System report on collection success ✓ System report on workflow success 	<ul style="list-style-type: none"> ✓ System report on third-party applications used by the collection team ✓ Direct access to credit bureau ✓ Direct access to registered email functionality ✓ Direct access to bulk SMS & email functionality

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<p>Your To-do's</p>				
<ul style="list-style-type: none"> <input type="checkbox"/> Send reminder to pay SMS 	<ul style="list-style-type: none"> <input type="checkbox"/> Review undelivered SMSs 	<ul style="list-style-type: none"> <input type="checkbox"/> Send informal letter of demand (email) 	<ul style="list-style-type: none"> <input type="checkbox"/> Review undelivered emails 	<ul style="list-style-type: none"> <input type="checkbox"/> Review workflow success
<p>The objective</p>				
<ul style="list-style-type: none"> ● For immediate impact on cash flow ● Test content impact 	<ul style="list-style-type: none"> ● Update account holder detail 	<ul style="list-style-type: none"> ● Request account holder to contact office for payment plan ● Test content impact 	<ul style="list-style-type: none"> ● Update account holder detail 	<ul style="list-style-type: none"> ● Adjust workflow steps and content to increase impact
<p> What Jumping Fox Software offers you</p>				
<ul style="list-style-type: none"> ✓ System creates workflow SMS to-dos with account detail and balance ✓ Single or bulk SMS functionality ✓ Template SMS content available 	<ul style="list-style-type: none"> ✓ System report on undelivered SMSs ✓ Direct access to credit bureau for trace reports to update account holder detail 	<ul style="list-style-type: none"> ✓ System creates workflow email to-dos with account detail and balance ✓ Single or bulk email functionality ✓ Template email content available ✓ Registered email functionality available 	<ul style="list-style-type: none"> ✓ Direct access to credit bureau for trace reports to update account holder detail 	<ul style="list-style-type: none"> ✓ System report on workflow success ✓ System report workflow best next step per account ✓ Edit workflow functionality ✓ Edit workflow templates functionality

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<p>Your To-do's</p>				
<p><input type="checkbox"/> Analyse payer vs non-payer ratio</p>	<p><input type="checkbox"/> Analyse payment plan accounts</p>	<p><input type="checkbox"/> Contact legal team for assistance on high priority accounts</p>	<p><input type="checkbox"/> Analyse up to date accounts for business opportunity</p>	<p><input type="checkbox"/> Review account holder categories and workflow week 5</p>
<p>The objective</p>				
<ul style="list-style-type: none"> ● Follow up on no payment accounts and negotiate payment plan (phone call) 	<ul style="list-style-type: none"> ● Follow up on defaulting accounts and adjust installments if necessary (phone call) 	<ul style="list-style-type: none"> ● Legal team to negotiate payment plan with account holder and review CAF and surety documents 	<ul style="list-style-type: none"> ● Identify low risk accounts for possible increase of credit limit 	<ul style="list-style-type: none"> ● Adjust category according to risk level to accelerate account for urgent action
<p> What Jumping Fox Software offers you</p>				
<ul style="list-style-type: none"> ✓ System create workflow phone call to-do with account detail and balance ✓ System phone call status report available ✓ System report on payer vs non-payer ratio ✓ System report on no action accounts to date ✓ System report on no payment to date & dashboard per account 	<ul style="list-style-type: none"> ✓ System report on arrangement accounts ✓ System reports on arrear arrangement accounts ✓ System report on account holder payment behavior ✓ System affordability calculator available 	<ul style="list-style-type: none"> ✓ Direct access to Jumping Fox Software panel attorneys 	<ul style="list-style-type: none"> ✓ System report on risk assessment for opportunity purposes 	<ul style="list-style-type: none"> ✓ System report on the best next step

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Your To-do's				
<ul style="list-style-type: none"> <input type="checkbox"/> Send urgent payment request SMS <input type="checkbox"/> Send formal letter of demand (email) 	<ul style="list-style-type: none"> <input type="checkbox"/> Review account holder payment behavior 	<ul style="list-style-type: none"> <input type="checkbox"/> Review probability of delinquency 	<ul style="list-style-type: none"> <input type="checkbox"/> Review delinquent accounts risk level 	<ul style="list-style-type: none"> <input type="checkbox"/> Review cash flow forecast <input type="checkbox"/> Review next months collection steps and content
The objective				
<ul style="list-style-type: none"> ● For immediate impact on cash flow ● Test content impact 	<ul style="list-style-type: none"> ● Identify accounts with low installment amounts 	<ul style="list-style-type: none"> ● Identify accounts with high default risk 	<ul style="list-style-type: none"> ● Identify high risk accounts for review of credit limit and exposue 	<ul style="list-style-type: none"> ● Adjust budget if necessary ● Adjust workflow steps and content to increase impact
 What Jumping Fox Software offers you				
<ul style="list-style-type: none"> ✓ System creates workflow SMS & email to-dos with account detail and balance ✓ Single or bulk SMS functionality ✓ Template SMS content available ✓ Single or bulk email functionality ✓ Template email content available 	<ul style="list-style-type: none"> ✓ System report on account holder payment behavior 	<ul style="list-style-type: none"> ✓ System report on account holder probability of delinquency 	<ul style="list-style-type: none"> ✓ System report on risk assessment 	<ul style="list-style-type: none"> ✓ System report on cashflow forecast ✓ System report workflow best next step per account ✓ Edit workflow functionality

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