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| **Business Concern:** | Outstanding Receivables In-Charge |
| **Department Name:** | Accounts Receivable Department |
| **Key Objectives:** | * To be able to find the right person to collect the receivables from clients on or before their due dates;
* To be able to employ an effective asset who will aid in diminishing the occurrence of outstanding receivables becoming doubtful accounts after a certain period;
* [INSERT ADDITIONAL DETAILS];
 |
| **30-DAY ACTION PLAN** |
| ☐ | Thorough screening of applicants who will fit the following qualities: well-organized, friendly, confident, and has good time management. |
| ☐ | Once a person is hired, orient the person about the company, its organizational culture, policies, and responsibilities on outstanding receivables under his/her department. |
| ☐ | Tour new outstanding receivables in-charge within the department and introduce him/her to co-workers, support departments, and other management supervisors. |
| ☐ | Set up a designated work desk and other tools and equipment necessary for the newly hired personnel to carry out his/her responsibilities. |
| ☐ | Train newly hired on the ins and outs of the company, as well as the procedures to follow when collecting receivables from clients, particularly, outstanding ones. |
| ☐ | Allow newly hired to apply his/her training and experience in an actual collection process with supervision for about 7 days.  |
| ☐ | Evaluate the 7-day work of newly trained on the collection process and request a separate review from his/her immediate supervisor. |
| ☐ | If a positive feedback is acquired, allow newly hired to take over the responsibilities with minimal or without supervision. |
| ☐ | Procure a progress report on the newly trained employee covering 30 days of being in-charge in the collection of outstanding receivables.  |
| **60-DAY ACTION PLAN** |
| ☐ | Review performance of an employee within 30 days and ensure that all course of action for the first 30 days have been completed. |
| ☐ | Establish communication with the employee, as well as his/her immediate supervisor  |
| ☐ | Conduct periodic training on employee on new policies for receivables collection from top management. |
| ☐ | Request prompt submission from employee on required paperwork. |
| ☐ | Communicate with department head on the collection process and the number of receivables collected every accounting period. |
| ☐ | Procure a progress report on the employee covering 60 days of being in-charge in the collection of outstanding receivables.  |
| **90-DAY ACTION PLAN** |
| ☐ | Review employee performance within 60 days and ensure that all course of action prepared for the first 60 days have been completed. |
| ☐ | Continue acquiring feedback on the collection process from the department head and discuss adjustments with the employee on such matters. |
| ☐ | Evaluate problems faced by the employee in collecting outstanding receivables and work on strategies to mitigate problems or issues. |
| ☐ | Conduct team meeting with the employee involved so that the employee can discuss her/her concerns. |
| ☐ | Procure a progress report on the employee covering 90 days of being in-charge in the collection of outstanding receivables.  |
| **Reported By:** | [INSERT COMPLETE NAME] |
| **Signature:** | [INSERT AUTHORIZED SIGNATURE] |