FREE PRINTABLE CHECKLIST · LINKUN FOUNDATION

Collections follow-up checklist

A friendly, firm schedule for following up on unpaid invoices, with short scripts you can copy.

Following up on a fixed schedule gets you paid faster and keeps it from feeling personal. Use the same steps for every customer.

Before the due date

- [ ] Send the invoice the day the work is done or the order ships, with the due date in the subject line.
- [ ] 3 days before the due date, send a short reminder: "Hi [name], a quick reminder that invoice [number] for [amount] is due on [date]. You can pay here: [link]. Thank you!"

After the due date

- [ ] Day 1: friendly email. "Invoice [number] for [amount] was due yesterday. If it's already on the way, thank you. If not, here's the link to pay: [link]."
- [ ] Day 7: call the customer or their accounts payable contact. Ask if anything is holding up payment and agree on a date.
- [ ] Day 14: firm email confirming the agreed date and noting your late fee policy, if you have one in your agreement.
- [ ] Day 30: pause new work until the account is current. Offer a payment plan if they need one.
- [ ] Day 45 to 60: send a final written notice. Decide whether to use a collection agency, small claims court, or write it off.

Prevent the next one

- [ ] Take deposits from new customers and on large jobs.
- [ ] Put payment terms and any late fee in writing before you start.
- [ ] Offer card, ACH, and automatic payments.
- [ ] Track what slow payers cost you with the late payments calculator.

Free 1:1 coaching from the Linkun Foundation: https://calendar.app.google/Y9th1oVrDYsY7tbk8. Educational only; not legal, tax, or accounting advice.