

Finance | Collections Coordination

Potential benefits

Cash flow acceleration

Speed decision making

1. Surface outstanding invoices

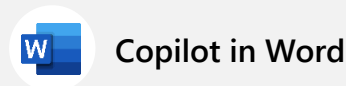
Ask Copilot to identify customers who have outstanding invoices using plugins built with Copilot Studio.



Speed analysis by connecting Copilot to your data in CRM and finance systems.

2. Build call script

Use Copilot to refine the call script used to communicate the unpaid invoices to customers.



Build conversation script, suggesting the most effective and policy compliant approach to remind of the balance and negotiate payment terms.

3. Call customers

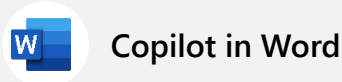
Call customers who have outstanding balances to provide guidance on creating a payment plan.



Simplify capture of customer intent and production of call notes.

6. Update legal team

Draft a summary of the collections cycle for the legal team. Draft the message with Copilot in Word, including references to associated documents and emails.



Quickly find and summarize documents related to a customer.

5. Update financial data

Use Copilot to help find notes from meetings, emails, and chat for crafting updates document the payment plan in the finance system.



Simplify the process of updating customer records by collecting information from various sources.

4. Send payment reminders

Use Copilot in Outlook to draft a follow up email beginning with the recap of the phone call.



Automate drafting of emails and use Copilot to revise the tone based on the customer situation.