

AGENCY ACTION

NOTES

An Action Plan Template

Goals:

1. \_\_\_\_\_

2. \_\_\_\_\_

Responsible Person(s): \_\_\_\_\_

Action Steps	Responsible Person/Group	Beginning Date	Ending Date
1.			
2.			
3.			
4.			
5.			

Required Resources: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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Approved by: \_\_\_\_\_

## AGENCY ACTION

## NOTES

### An Action Plan Example

Goal:

Decrease account receivables over 60 days old to 7% and account receivables over 90 days old to 10%.

Responsible Person(s): Owner

Action Steps	Responsible Person/Group	Beginning Date	Ending Date
1. Establish an agency-wide collection policy for both personal and commercial lines accounts which minimizes both the amount and age of receivables.	Owner	01/2019	ongoing
2. Communicate and implement the policy.	Owner/ Manager	01/2019	01/2019
3. Notify agency bill clients of the policy change.	Owner	after Step 2 is completed	within 30 days
4. Producers and/or account managers contact late-paying accounts to collect or terminate.	Sales/Service Team	02/2019	02/2019
5. Monitor and evaluate progress and make necessary adjustments.	Owner/ Manager	Monthly	ongoing

Required Resources:

- 1 Third-party collection agency
- 2 None
- 3 Assistant to conduct email blast and form-letter mail merge
- 4 None
- 5 Pre- and post-reports

Approved by: \_\_\_\_\_