

AUTOMATE

Intermediate

25 MIN

• UPDATED 2026-10-01

Coordinate overdue collections with Copilot.

Have Copilot prioritize overdue accounts and draft outreach instead of working the collections list in whatever order it happens to sit.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

Collections effort focused on the accounts most likely to pay with the least friction, improving cash recovery.

Workflow Steps

Step 1: Pull the current overdue accounts list

Excel

Export the list into a Table with columns for days overdue, amount, and prior contact attempts (date and outcome of each).

Without that contact-history column, any ranking you build next just sorts by dollar amount, which routinely puts a large account you've already contacted twice ahead of a smaller one that's never been reached at all.

Step 2: Ask Copilot to prioritize and draft outreach

Copilot

Have it rank accounts by a combination of amount, age, and likelihood to respond, and draft a first-contact message for each.

PROMPT

Rank these overdue accounts by priority considering amount, days overdue, and whether we've already attempted contact. Draft a brief, professional first-contact message for the top 10.

Step 3: Review drafts for tone before sending

Excel

A collections message that's too aggressive damages a relationship worth keeping; one that's too soft doesn't get paid – check the tone fits each account's situation and history.

Step 4: Track responses and feed them back into next cycle's priority

Excel

Note which accounts responded and how, so next cycle's prioritization reflects what's actually working.

✓ Check the work

- Prioritization reflects actual payment likelihood signals, not just dollar amount.
- Draft messages were reviewed for tone before any were sent.
- Response outcomes are tracked to improve next cycle's prioritization.

Expected Outcome

A prioritized collections list with draft outreach messages ready for review per account.

Want help rolling this out across your team? [Go to Liminals.Tech](#) ■