

# Collections Squirrel

## A Collections Management Solution for Retail Banks

*Automate, Collect More & Faster for Less*

Collections Squirrel removes the complexity and expense of automating the collections process. It delivers:

- Optimization of your collections management strategy and tactics to significantly boost debt collection
- Complete automation of all collection and collection management processes resulting in sustained and predictable collection results
- Real-time activity, performance tracking, analysis and reports enabling your Collections Managers to have timely and effective coaching conversations with their Collectors

In addition, we provide in-depth training of Collectors and Collection Managers and provide ongoing evaluation and support for collection effectiveness.

### Customize & Automate Collections Processes

Use Collections Squirrel to integrate and automate the collection administration and management process across your organization. Live dashboards provide real time collection planning and performance data by Collector, by product, by region and for the entire bank. All reports are fully customizable with daily, weekly, monthly and annual information of performance.

Squirrel can be licensed on a 'pay-as-you-go' basis and there are no upfront software license fees or annual maintenance contracts to worry about. You don't need to make any long-term commitment and you only pay a small one-time implementation fee and then only a per user per month charge based on actual usage of the service.

### Key Benefits

- Simple to use - from field collector to supervisor to business head
- Built to easily customize strategy & process
- Automate from first contact to resolution
- Monitor & reward performance
- Bespoke analytics to measure success
- Easy course correction through challenger strategies
- Flexible Pricing
- No fixed investment required
- Reduce cost per \$ collected

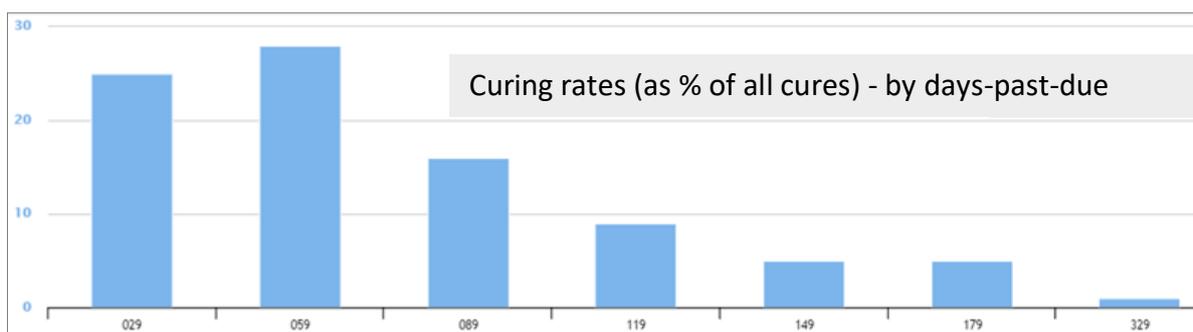
### Access Anytime and Anywhere

Collections Squirrel is cloud-based and banks can choose to locate the server within their own firewall. The service can be accessed on Android devices with our mobile app or any desktop PC empowering your frontline collections staff to maximize their collection success rate.



## Key Features & Benefits

- **Daily customer planning:** Every collector is assigned collection cases where priority is a function of your collection strategy. So, the collection staff is automatically reminded each morning of the planned customer meetings or calls for that day. Alerts are triggered to supervisors if any Collector fails to acknowledge this prioritized list by a set time in the morning
- **Define purpose of each call:** The Collector or their supervisor get to record personal notes ahead of the customer meeting or call clear objectives for each customer interaction
- **Reschedule Contact:** Collector is directed to reschedule any planned call not completed
- **Allocate New Accounts:** Collections Squirrel automatically reallocates new target customer names to specific Collectors if promised repayment is not received
- **Recording Promised Repayments:** Collector records what the customer has agreed with expected date and amount of repayment
- **Broken-Promise Reminders:** Reminders are sent for follow-up when the customer has promised repayment but the no repayment has been made
- **Tracking Maps:** actual intra-working-day movement of collections staff via live mapping (optional)
- **Tracking results:** View real-time collections achievements vs. targets and incentive compensation
- **Fully Auditable and Permanent Customer Records:** Adding or editing existing customer information creates permanent collection record (which is not lost if the collections person was to defect to a competing bank)
- **Real-time Push Notifications:** General alerts, broadcasts and dynamic guidance can be pushed to all or selected set of Collectors instead of having to cascade down through layers of collections management staff. This results in saved time and improved effectiveness.
- **Live Reports & Charts:** Customizable charts and reports that show any metric such as cure rates, days past due, write-off rates, prior history and charts them by geography, customer demographic, product, relationship manager, and by time:



We provide in-field coaching and an implementation architecture that transforms a Bank's retail collections culture into a process that empowers the Collections Managers and the frontline Collectors to execute their activities more effectively. We help implement optimal collections discipline across the entire retail organization resulting in higher closure rate.

Please contact [collections@banktandd.com](mailto:collections@banktandd.com) for more information.