

CASE STUDY: COLLECTIONS APP

Facebook BizApps 2018

OPPORTUNITIES

Collectors follow up on past-due invoices from advertisers. In Q3 2018, ad revenue was \$13.5B of \$13.7B total revenue.

- In their existing workflow, collectors measured their success by the number of customer contacts instead of dollar amount collected.
- Collectors were going in and out of multiple tools to follow up on a single invoice.
- Collectors lacked a clear understanding of how best to spend their time.
- Managers and quality control analysts lacked insight into collector performance.

SCOPE

1

Designer

1

PM

3

Engineers

70

Collectors

- The project had started several months before I joined the team and design had been put on hold to do more research. About 20% of the designs had been delivered when I started and I picked up the remainder of the project.
- I met with the product manager daily to discuss features. I delivered interactive prototypes to engineering daily.
- I iterated mostly on the data visualizations and on the communications interaction.
- My total design time was about six weeks.

RESEARCH

By Liquidhub



"I spend too much time assembling proof and packets for approval."
—Mandi, Collections Agent



"I don't want to switch between several different views to find the information that I need"
—Shane, Collections Agent



"I need visibility into what my team is doing."
—Remy, Collections Team Lead

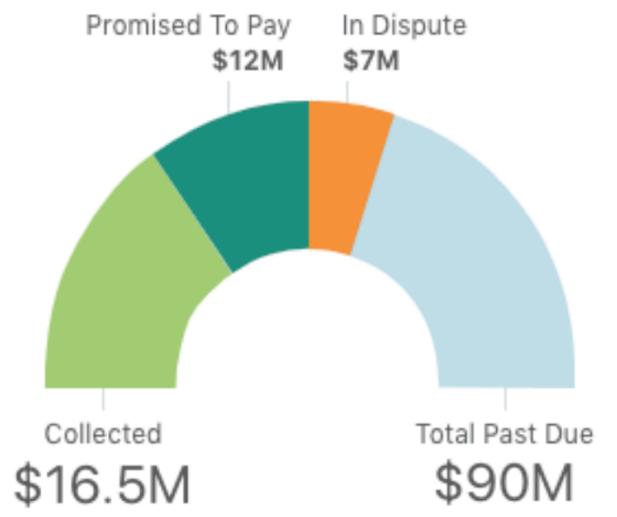
SOLUTION

Select Screens

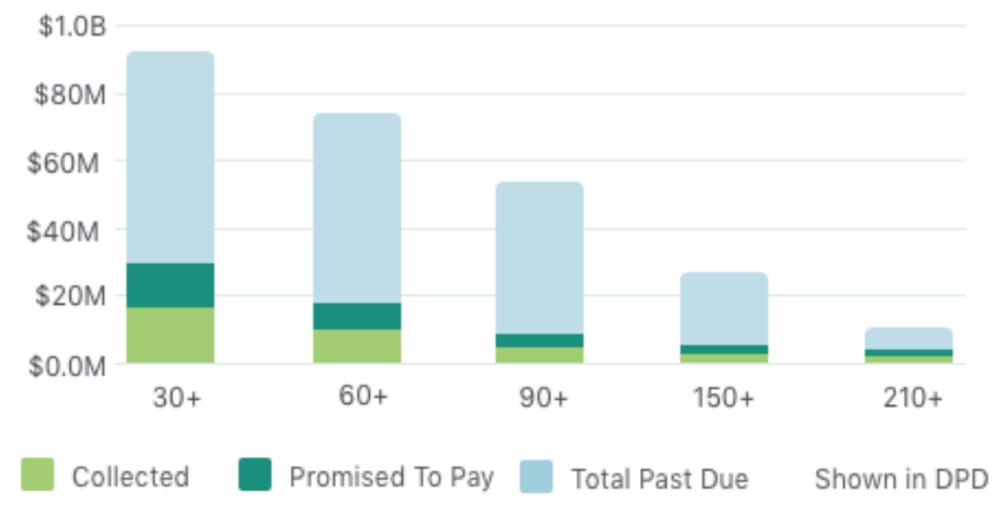
1. Collector's landing page with a triaged list of accounts and performance metrics so agents can quickly see how they're doing.
2. Account page where agents can see all information about an account in one place and see quickly what they need to do next.
3. Manager's landing page where managers can quickly see how their team is doing and redistribute workload as needed.
4. Quality control landing page where analysts see a cross-team view of agent performance and high risk accounts.
5. Quality control view of account page where analyst can follow up with manager and analysts with any concerns.

Jane Smith
Collector

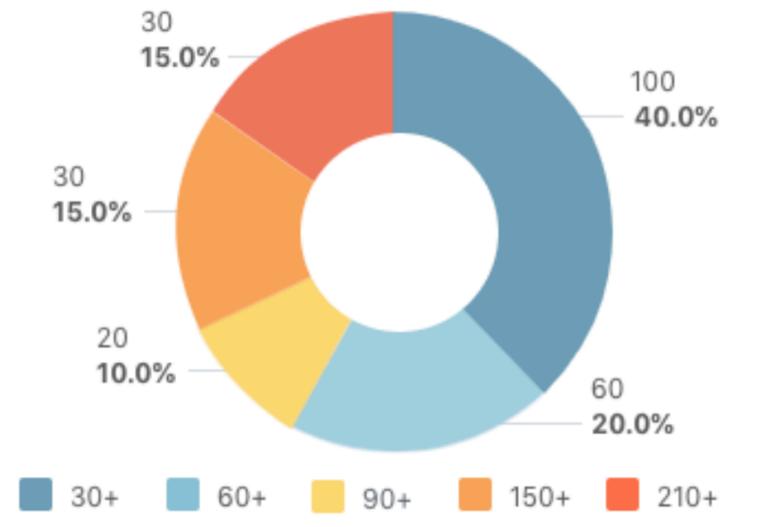
Overview



Amount Past Due



Accounts Past Due



Queue Inbox

Account Name is All Days Past Due is All Customer Tier is All

24 Results

ACCOUNT	TOTAL DUE AMOUNT	DPD	INTERACTION	RECENT ACTIVITY	LAST ACTION
ACME Co. Tier 1	841,666.83 USD 10 open invoices	22	✉️ 1 📞	Promised 12/4/2017 — Due 12/31/2017 — Called 2/1/2018	Left 5 messages with account manager.
ABC Inc. Tier 1	634,499.20 USD 4 open invoices	20	✉️ 📞	Promised 12/4/2017 — Promised 12/31/2017 — Called 2/1/2018	Transcript: Hi, Jane. I'm calling to let you kn... ▶ Play Message
Widgets Galore Tier 1	221,600.21 USD 3 open invoices	22	✉️ 📞	Promised 12/4/2017 — Promised 12/31/2017 — Due 2/1/2018	They need to make some adjustments on the invoices but promised to pay.
International Coffee Co. Tier 1	841,666.83 USD 10 open invoices	22	✉️ 1 📞	Promised 12/4/2017 — Due 12/31/2017 — Called 2/1/2018	Left 5 messages with account manager.
Travel Inc. Tier 1	634,499.20 USD 4 open invoices	20	✉️ 📞	Promised 12/4/2017 — Promised 12/31/2017 — Called 2/1/2018	Transcript: Hi, Jane. I'm calling to let you kn... ▶ Play Message

ACME Co. Tier 1 Past due by 22 days
 26-30 Strutton Ground, Singapore, Westminster, SW1P 2HR
 Primary contact: Nandit Singh (408) 555-1212 nandit@acme.com

Total Past Due **236,450.73 USD**
 Assigned to jane@fb.com

Account Notes

Nandit pays special attention to payment dates. His strategy is to line up payments as close to the due date as possible, in order to maximize the cashflow advantage. On numerous occasions, this has resulted in late payments.

- More Contacts** 3
- Robert Johnson**
 (831) 555-1212
 robert@acme.com
- Caroline Smith**
 (650) 555-1212
 caroline@acme.com
- Jennifer Lopez**
 (415) 555-1212
 jennifer@acme.com

Additional Info

Account Terms Net 30
 Credit Limit 250,000.00 USD
 Credit Utilization 120%

View by Advertiser ▾

<input type="checkbox"/> INVOICE #	LIABILITY TYPE	OPEN AMT ORIGINAL AMT	DPD ▾ DUE DATE	STATUS	NOTES
<input checked="" type="checkbox"/> 0012345678	Sequential	100,000.00 USD 150,000.00 USD	132 08/15/2017	● Open	Lorem ipsum dolor sit amet, consectetur adipiscing elit...
<input checked="" type="checkbox"/> 0001908227	Sequential	80,000.00 USD 90,000.00 USD	122 08/25/2017	● Promised To Pay 02/15/2018	Sed do eiusmod tempor incididunt ut labore et do...
<input type="checkbox"/> 0000230480	Sequential	20,000.00 USD 60,000.00 USD	115 09/02/2017	● In Dispute	Ut enim ad minim veniam.
<input type="checkbox"/> 0000921384	Normal	10,000.00 USD 15,000.00 USD	94 09/25/2017	● In Dispute	Quis nostrud exercitation ullamco laboris nisi ut aliq...
<input checked="" type="checkbox"/> 0002398473	Normal	2,000.00 USD 5,000.00 USD	64 10/22/2107	● Open	Duis aute irure dolor.
<input checked="" type="checkbox"/> 1101239402	Sequential	3,000.00 USD 5,000.00 USD	55 10/31/2017	● Promised To Pay 02/15/2018	In reprehenderit in voluptate velit esse cillum...
<input type="checkbox"/> 0000234324	Normal	100,000.00 USD 150,000.00 USD	40 11/15/2017	● Open	Lorem ipsum dolor sit amet, consectetur adipiscing elit...
<input type="checkbox"/> 0001232132	Sequential	80,000.00 USD 90,000.00 USD	36 11/19/2017	● Promised To Pay 02/15/2018	Sed do eiusmod tempor incididunt ut labore et dol...
<input type="checkbox"/> 0000230480	Sequential	2,000.00 USD 5,000.00 USD	36 11/19/2017	● In Dispute	Ut enim ad minim veniam.
<input type="checkbox"/> 0000921384	Normal	3,000.00 USD 5,000.00 USD	33 11/22/2017	● In Dispute	Quis nostrud exercitation ullamco laboris nisi ut ali...

4 invoices selected **Total Due: 185,000.00 USD**

Email Call Edit Follow Up Flag

Payments

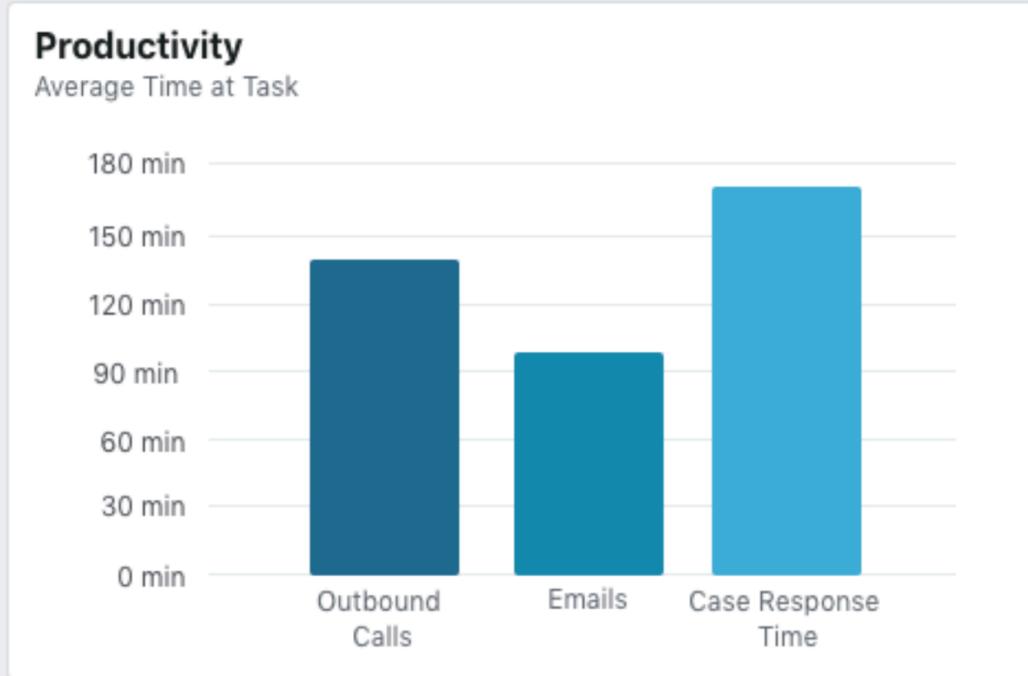
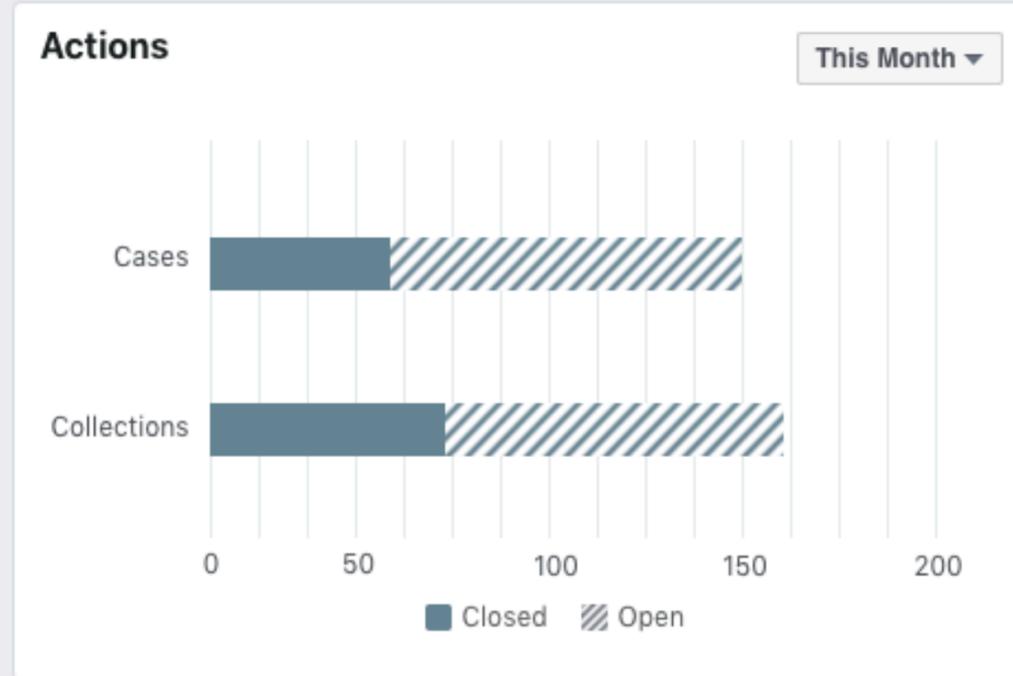
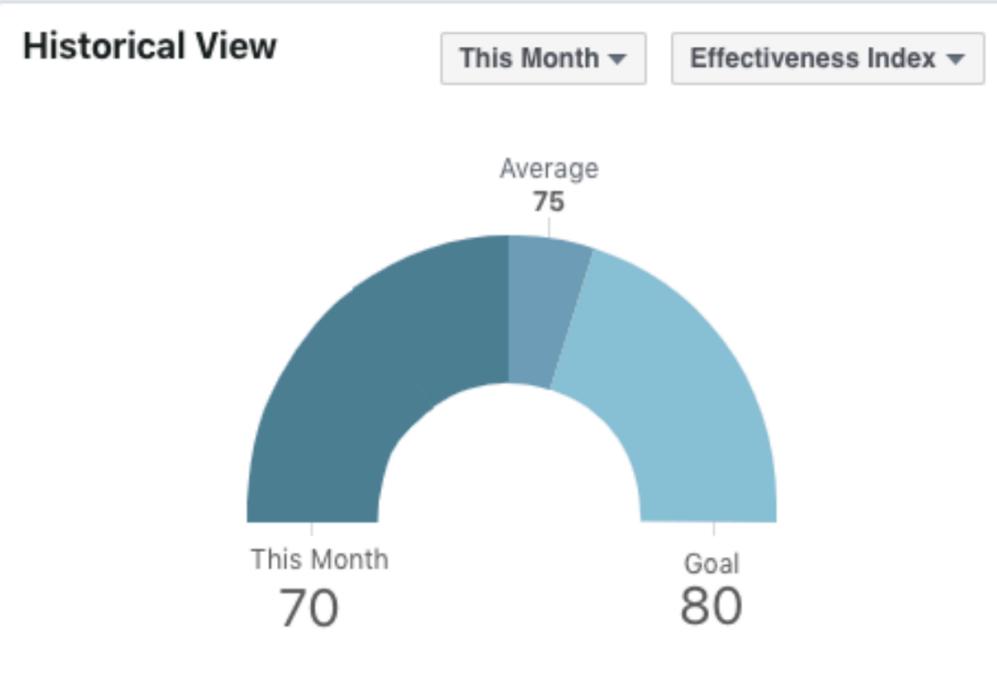
Unapplied All Payments

- Receipt # 312908374342342
 Amount 13,000.00 USD
 Date Received 01/28/2018
- Receipt # 312908374342341
 Amount 1,000.00 USD
 Date Received 01/01/2018
- Receipt # 312908374342340
 Amount 3,000.00 USD
 Date Received 12/28/2017

- Next Steps**
- Follow up call** Yesterday
 Call to check if the p...
 - New Email** Today
 Subject: Need help
 - Follow up email** Tomorrow
 Need to email after th...

Previous Actions

John Doe
 Team Lead
 Accounts **Collectors**
All Team ▼

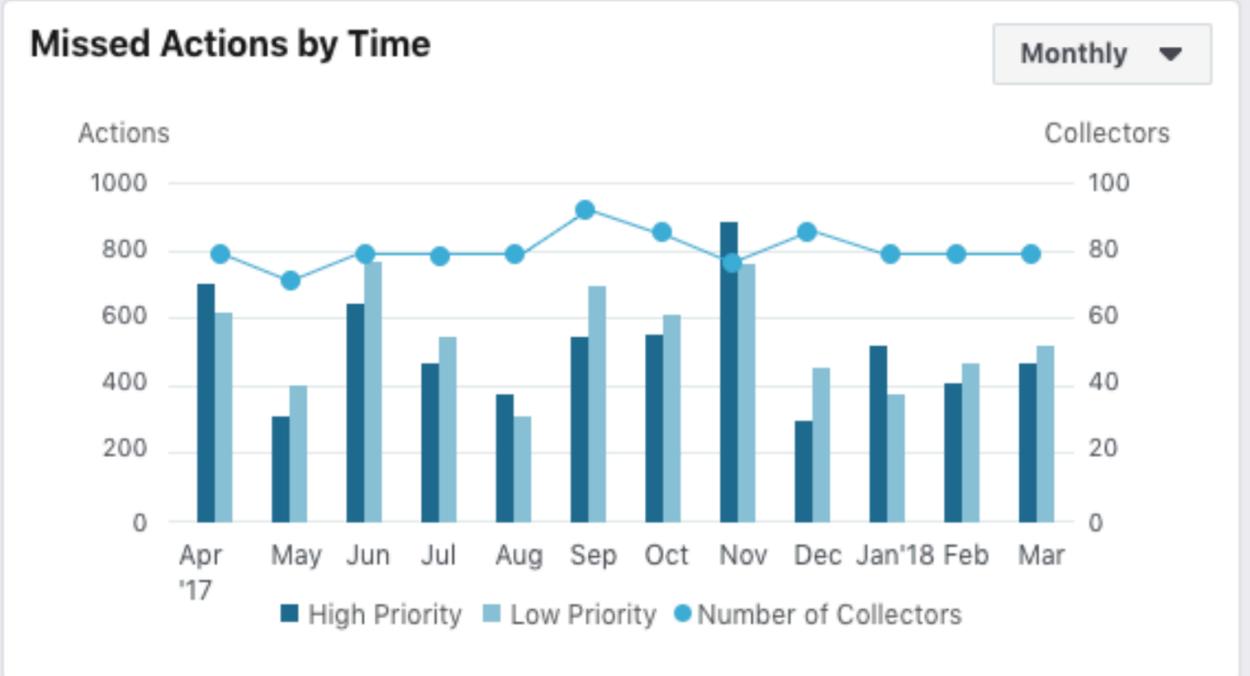
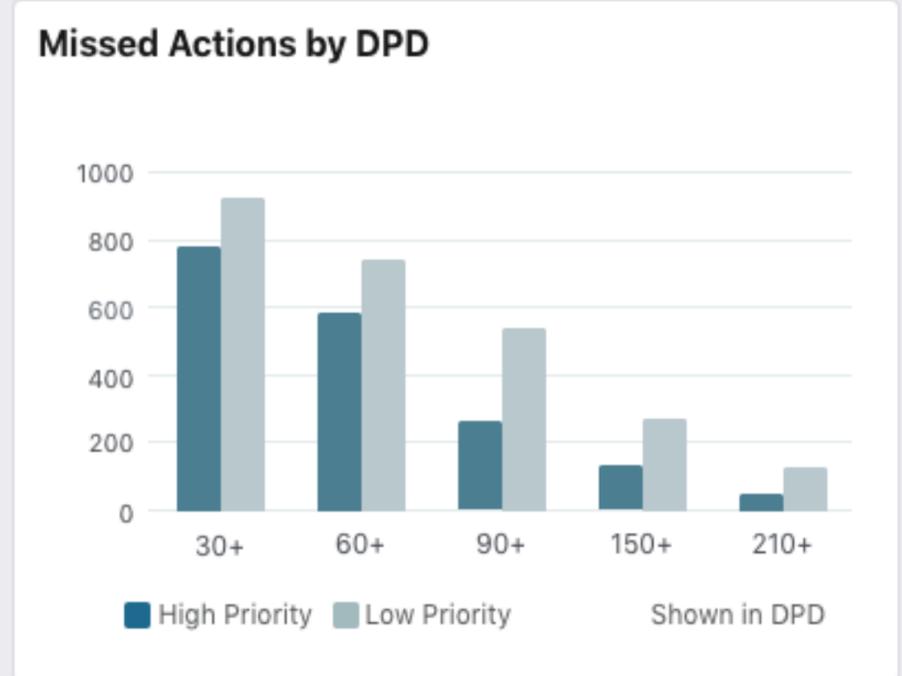
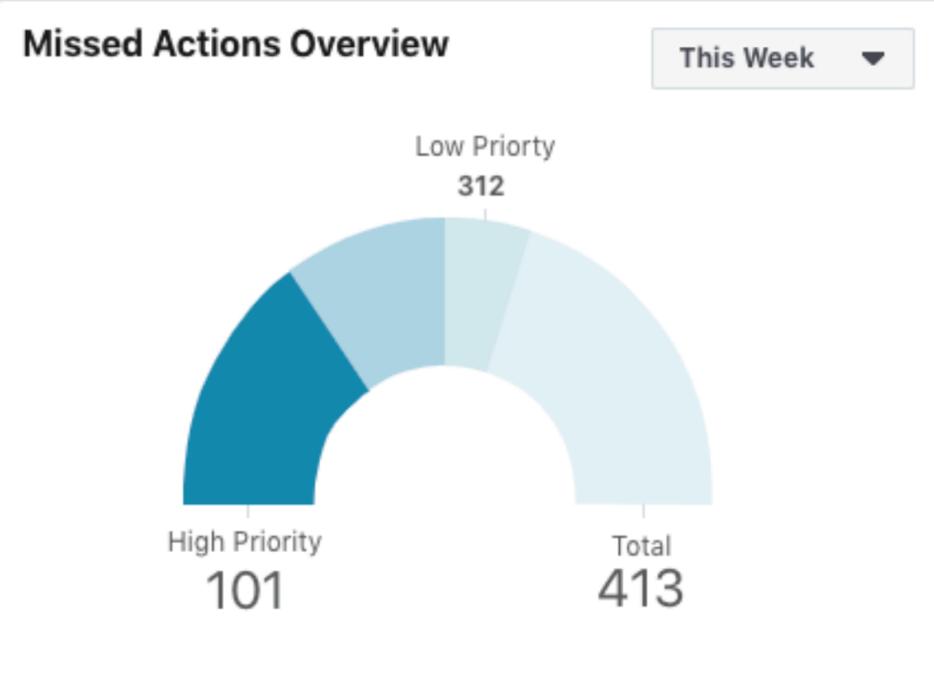


Reassign

COLLECTOR	TOTAL DUE AMOUNT	NO. OF ACCTS	TOTAL COLLECTED TARGET	NO. OF ACTIONS TARGET	MISSED ACTIONS	EFFECTIVE INDEX
<input type="checkbox"/> Jane Smith	841,666.83 USD	LOW TIER 200 HIGH TIER 50	16.5M USD 30.0M USD	600 900	5	87 ↑ 5% m/m
<input checked="" type="checkbox"/> Steve Tinsdale	634,499.20 USD	LOW TIER 500	1.1M USD 19.0M USD	80 500	20	24 ↓ 85% m/m
<input type="checkbox"/> Annie Smith	841,666.83 USD	LOW TIER 200 HIGH TIER 50	16.5M USD 30.0M USD	600 900	5	87 ↑ 5% m/m
<input type="checkbox"/> Stephen Cunningham	634,499.20 USD	LOW TIER 500	1.1M USD 19.0M USD	80 500	20	24 ↓ 85% m/m
<input type="checkbox"/> Dorothy Mandell	841,666.83 USD	LOW TIER 200 HIGH TIER 50	16.5M USD 30.0M USD	600 900	5	87 ↑ 5% m/m

Sally Arnold
QA

All Team ▾



Search...

ACCOUNT	TOTAL DUE AMOUNT ▾	DPD	COLLECTOR	RECENT ACTIVITY	ORIGINAL CREDIT LIMIT	LAST ACTION
ACME Co. Tier 1	854,666.83 USD 10 open invoices	22	Jane Smith		1,500,000 USD	Called and left messages.
Godiva Tier 1	653,499.20 USD 4 open invoices	20	Steve Tinsdale		1,500,000 USD	Called and left messages.
Nabisco Tier 1	41,221,600.21 USD 3 open invoices	22	Annie Smith		600,000 USD	Account is not returning messages.
Hershey's Tier 1	41,221,600.21 USD 3 open invoices	22	Stephen Cunnigham		600,000 USD	Account is not returning messages.
See's Candies Tier 1	41,221,600.21 USD 3 open invoices	22	Dorothy Mandell		600,000 USD	Account is not returning messages.

ACME Co. Tier 1 Past due by 22 days
 26-30 Strutton Ground, Singapore, Westminster, SW1P 2HR
 Primary contact: Nandit Singh (408) 555-1212 nandit@acme.com

SENT TO THIRD PARTY
 Total Past Due **236,450.73 USD**

Jane Smith
 Collector

Account Notes
 Nandit pays special attention to payment dates. His strategy is to line up payments as close to the due date as possible, in order to maximize the cashflow advantage. On numerous occasions, this has resulted in late payments.

More Contacts 3

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 (831) 555-1212
 robert@acme.com
- Caroline Smith**
 (650) 555-1212
 caroline@acme.com
- Jennifer Lopez**
 (415) 555-1212
 jennifer@acme.com

Additional Info

Account Terms Net 30
 Credit Limit 250,000.00 USD
 Credit Utilization 120%

Search Invoices View by Advertiser

INVOICE #	LIABILITY TYPE	OPEN AMT ORIGINAL AMT	DPD DUE DATE	STATUS	NOTES
<input type="checkbox"/> 0012345678	Sequential	100,000.00 USD 150,000.00 USD	132 08/15/2017	Written Off	Nandit says he can't collect from these advertisers.
<input type="checkbox"/> 0001908227	Sequential	80,000.00 USD 90,000.00 USD	122 08/25/2017	Written Off	Nandit says he can't collect from these advertisers.
<input type="checkbox"/> 0000230480	Sequential	20,000.00 USD 60,000.00 USD	115 09/02/2017	In	
<input type="checkbox"/> 0000921384	Normal	10,000.00 USD 15,000.00 USD	94 09/25/2017	In	
<input type="checkbox"/> 0002398473	Normal	2,000.00 USD 5,000.00 USD	64 10/22/2107	Wr	
<input type="checkbox"/> 1101239402	Sequential	3,000.00 USD 5,000.00 USD	55 10/31/2017	Wr	
<input type="checkbox"/> 0000234324	Normal	100,000.00 USD 150,000.00 USD	40 11/15/2017	Op	
<input type="checkbox"/> 0001232132	Sequential	80,000.00 USD 90,000.00 USD	36 11/19/2017	Pro 02	
<input type="checkbox"/> 0000230480	Sequential	2,000.00 USD 5,000.00 USD	36 11/19/2017	In	
<input type="checkbox"/> 0000921384	Normal	3,000.00 USD 5,000.00 USD	33 11/22/2017	In	

Payments

Unapplied All Payments

- Receipt # 312908374342342
 Amount 13,000.00 USD
 Date Received 01/28/2018
- Receipt # 312908374342341
 Amount 1,000.00 USD
 Date Received 01/01/2018

New Email

To: Jane Smith (Collector), John Doe (Team Lead) 3:22 PM

Subject: Request Route Cause Analysis: ACME Co.

Jane and John,

I'm following up on the account below, please let me know why actions for this account are past due:

Account	ACME Co.
Priority	High
Amount Past Due	100,000.00 USD
Actions Past Due	15

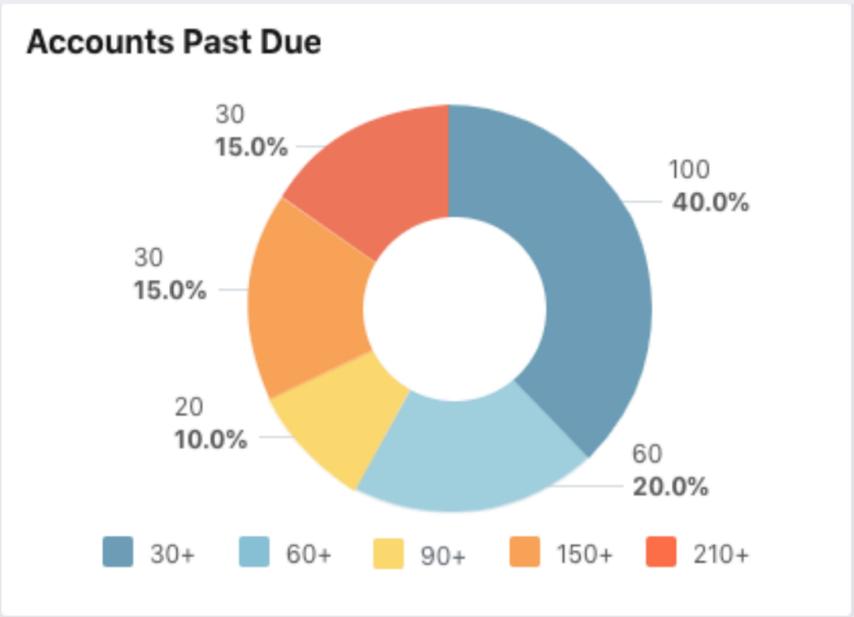
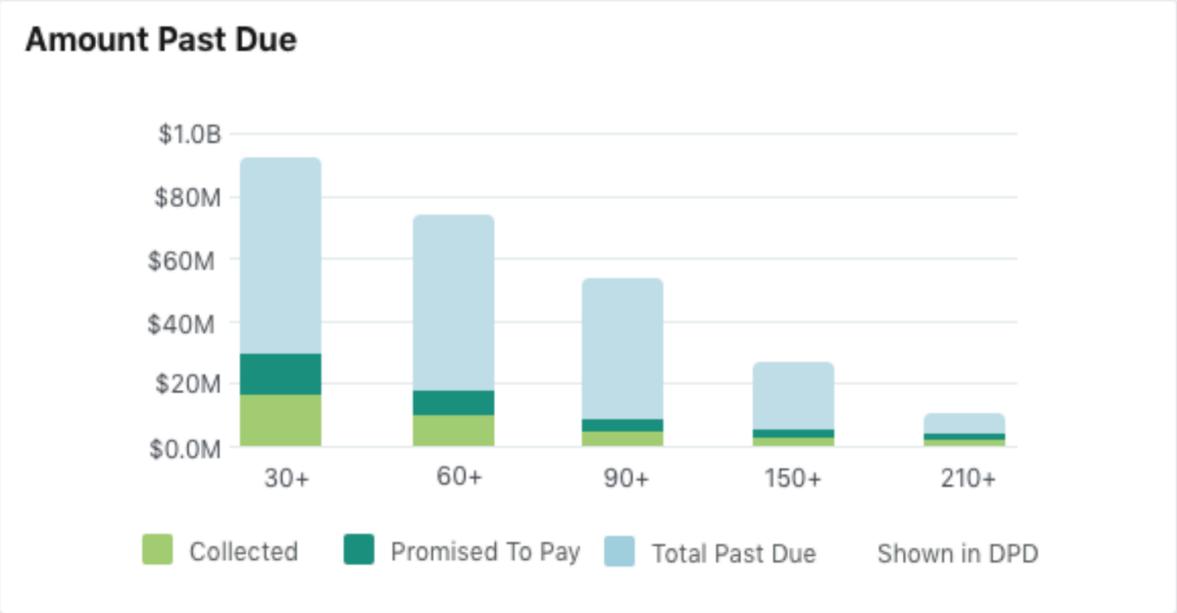
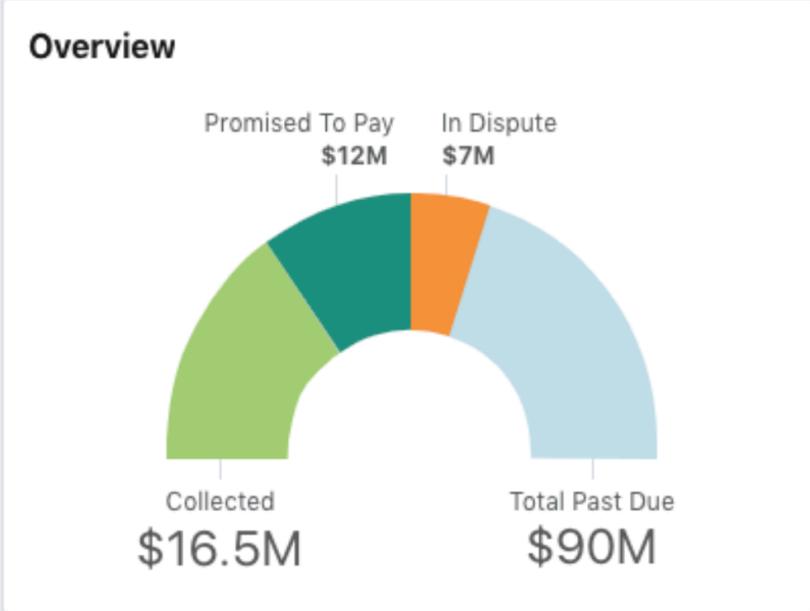
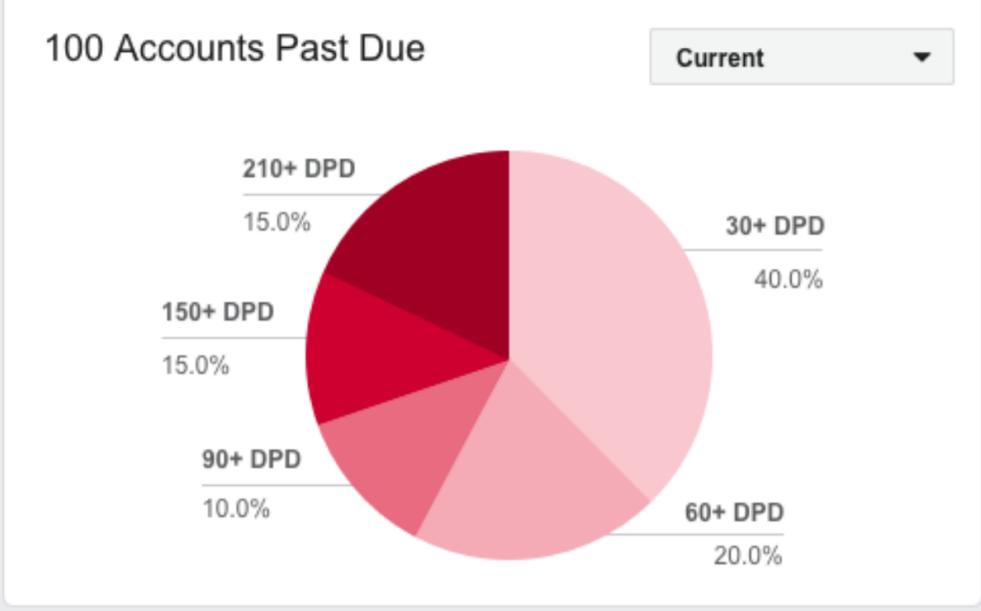
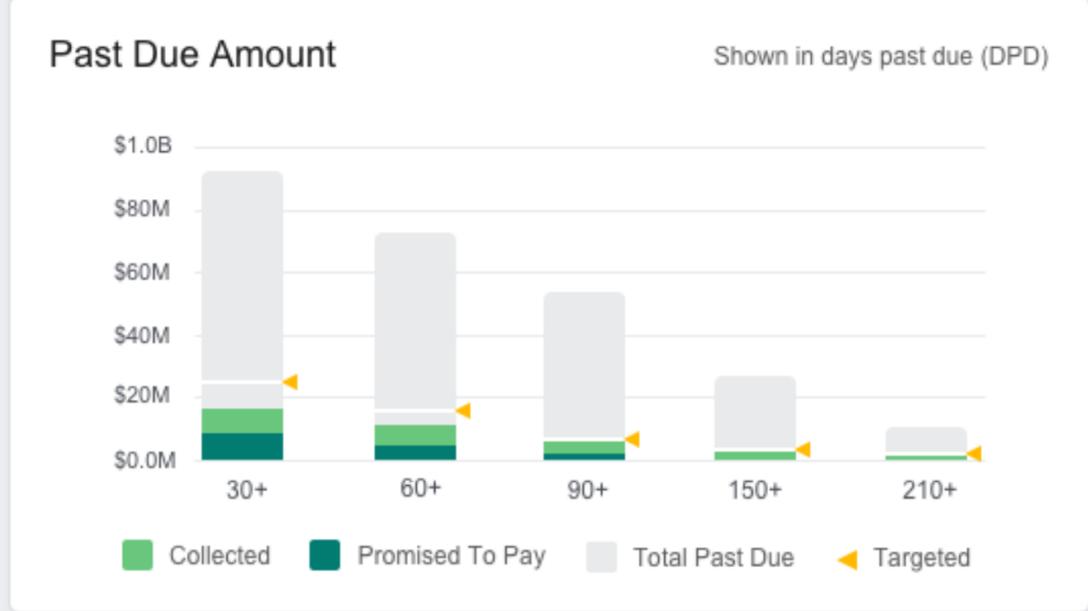
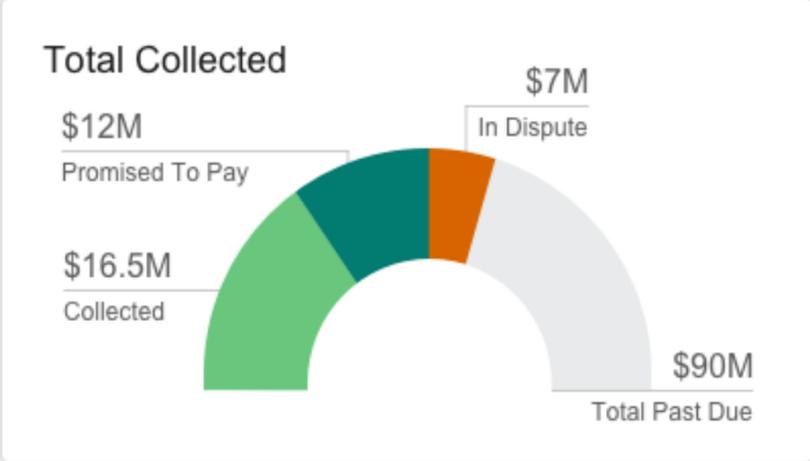
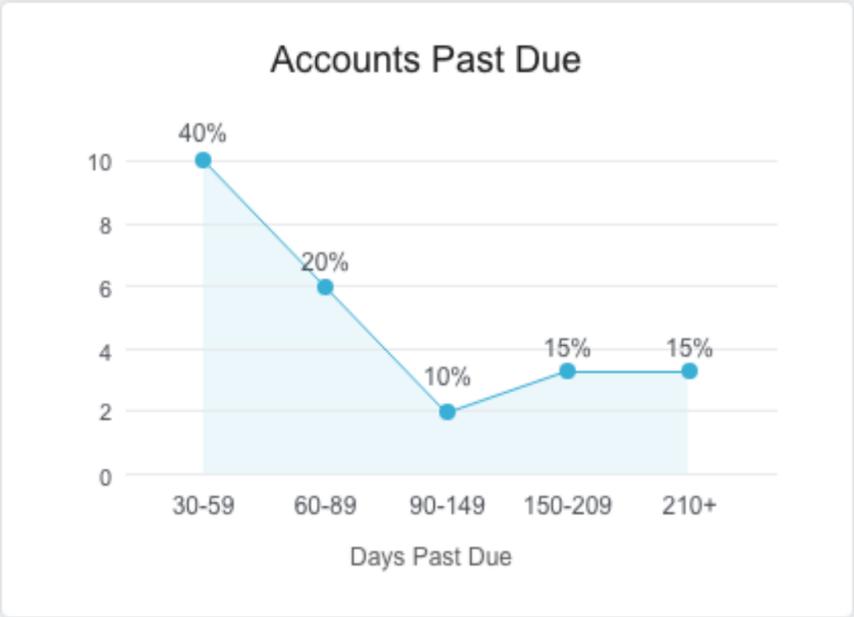
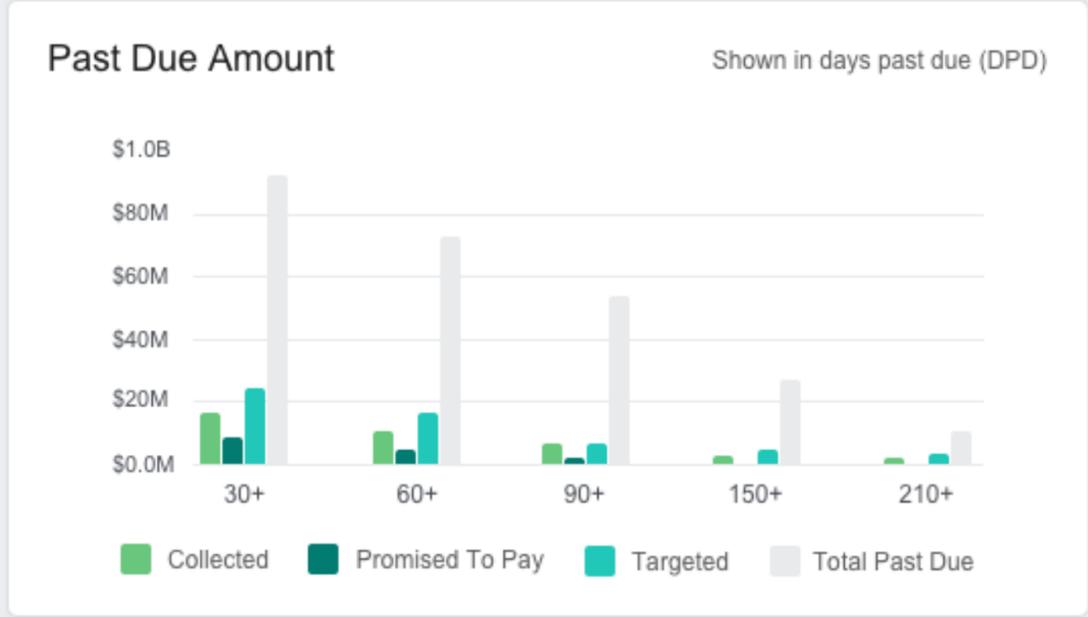
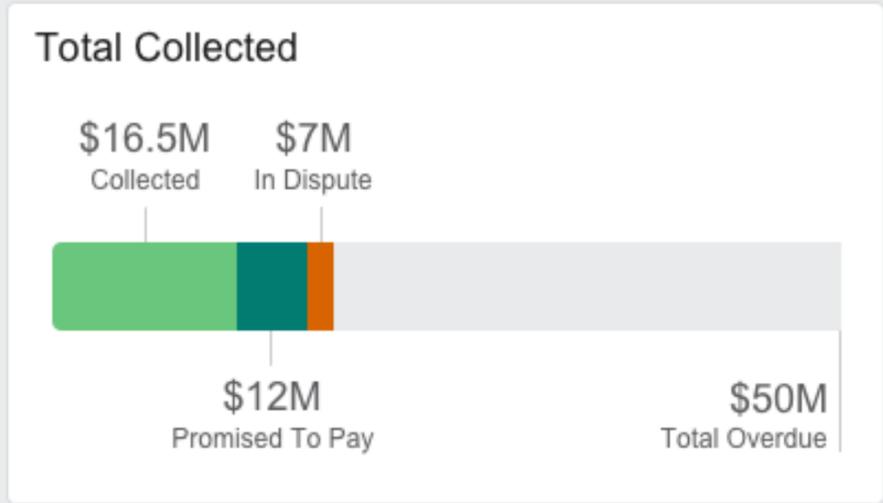
Let me know if you have any questions.

Thanks,
 Sally

4 invoices selected
Total Due: 185,000.00 USD

Close Send

EXPLORATIONS



View Email — ↶ ↷ ↵ ✕

From: Nandit Singh
 Primary Contact • General AP query
 Mon, Mar 2, 2018 2:35 AM

Assigned to **Jane Smith (Me)** ▼

Re: Invoice #000000992 follow up

The check for invoice #000000992 is in the mail.

Thanks,
 Nandit

From: Jane Smith
Date: Fri, Feb 28, 2018 12:02 PM
To: Nandit Singh
Subject: Invoice #000000992 follow up

Hi, Nandit, I hope you're well. I'm just writing to follow up on the outstanding invoices below. Please advise.

Open Invoices (4)		Total due	185,000.00 USD
Nike	#0012345678	100,000.00 USD	

A 🖼️ 😊 🔗 📎 ▼ Forward Internally Reply to Sender ▼

Case #0000007613 — ↶ ↷ ↵ ✕

Account **Alibaba** ▼ View > Case Status **Active** ▼

From **Devon Berkshire** ▼ Linked to case **#0000007621** ▼

Assigned to **Jane Smith (Me)** ▼ Date Fri Mar 17 11:06 AM

Reply | Internal Message

From: Devon Berkshire • Fri Mar 17 1:13 PM
 (Transcript) Hi, Jane. This is Devon Berkshire from Alibaba, I know you're used to talking with Nandit but he's on vacation so I'm helping to fill in while he's out for the rest of the week. I'm calling to let you know that I received your messages about the unpaid invoices. I have questions about some of the line items in the invoices so that's why I wanted to follow up with you. Please let me know when's a good time to call you back. I'm at (888) 726-3908. Thanks, and hope to speak with you soon.

Call
Email
Reply

Inbox	Drafts	Sent
Sort by Date ▾		
✉ Devon Berkshire		3/25/18
Re: Re: Voicemail message		
Jane, for the last three invoices it looks like we...		
↩ Devon Berkshire		3/25/18
Voicemail message		
Hi, Jane. This is Devon Berkshire from Alibaba...		

You followed up on this message on 3/26/2018 at 10:56 PM [Show reply](#)

Devon Berkshire
Re: Re: Voicemail message
To: Jane Smith

March 25, 2018 at 10:56 PM

▶ Play Message

Jane, for the last three invoices it looks like we were charged for tax and normally we aren't charged for tax. Let me know what you think.

Devon

From: Jane Smith • Mar 25 10:56 PM
Hi, Devon. Thanks for getting back to me. Which items do you have questions about? I'd like to investigate the so I can get back to you.

Thanks,
Jane

From: Devon Berkshire • Fri Mar 25 10:56 PM
(Transcript) Hi, Jane. This is Devon Berkshire from Alibaba, I know you're used to talking with Nandit but he's on vacation so I'm helping to fill in while he's out for the rest of the week. I'm calling to let you know that I received your messages about the unpaid invoices. I have questions about some of the line items in the invoices so that's why I wanted to follow up with you. Please call me at your earliest convenience at (408) 555-1234 or email me at devonb@alibaba.com. Thanks and have a great day.

CASE INFO [Edit](#)
Assigned to **Jane Smith**
Linked to cases --

- ACTIVITY & NOTES**
- Jane Smith** followed up on this message
Mar 26, 10:56 PM
 - Devon Berkshire** replied to message
Mar 25, 10:56 PM
 - Jane Smith** replied to message
Mar 25, 10:56 PM
 - Jane Smith** changed From to Devon Berkshire
Mar 25, 10:56 PM
 - Jane Smith** changed Account to Alibaba
Mar 25, 10:56 PM
 - Unknown** left a voicemail message
Mar 25, 10:56 PM

Reply | Reply All | Follow Up

Write a note...

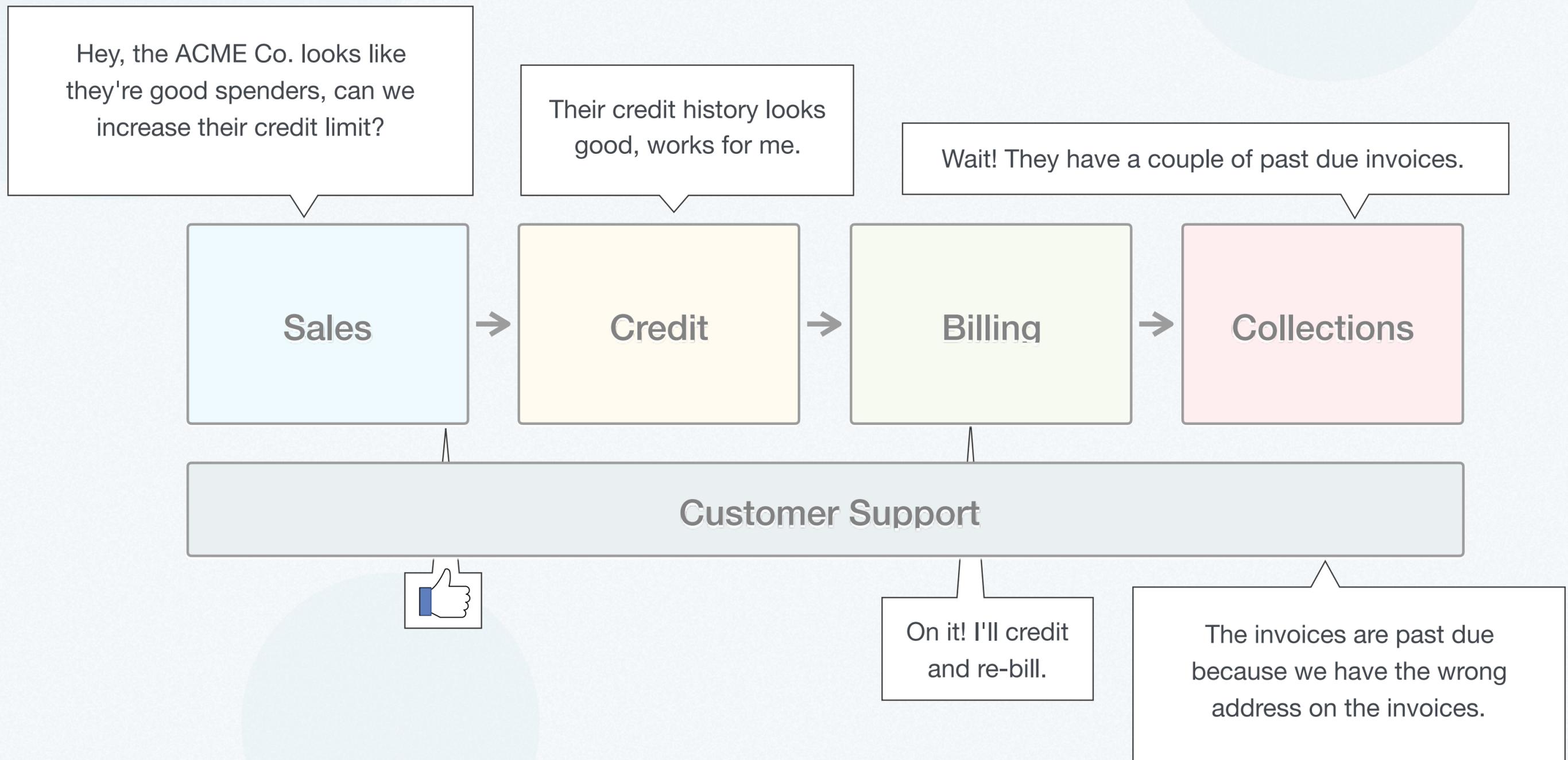
IMPACT

"I've been working as as a collector for a long time. This tool exactly matches my workflow. If I'd known this was coming I might have stayed on as a collector."

—Collections Agent

FUTURE VISION

Leverage the design framework for other apps so that departments across Revenue—sales, credit, billing, collections, and customer support—can all have access to the same customer information.



www.sarahbeaver.com