

Resolving the Bookkeeper Personality Dilemma

(Make a copy of this and give it to your Financial Coordinator)

As a typical Financial Coordinator you are probably a task-oriented-person with a strong analyzer style, but a weak get-it-done director style. Your strong analyzer style allows you to work on accounts, paying attention to every detail associated with the account. If you have a *weak* director style it makes you indecisive and afraid to go after past due accounts. This is especially true if your *relater* style is also strong. Look at your personality profile to see your natural style strengths and weaknesses.

Being an ideal bookkeeper, being afraid to go after past due accounts is natural, but not necessary. There are a few things to keep in mind when trying to resolve past due accounts:

1. A past due account does not make the guarantor a bad person, just someone who needs help to catch up—you probably have already met them and found them personable. You should look at this necessary contact with them as something positive, not negative.
2. You are not doing them a favor by not contacting them the first month they are past due, they probably just forgot to pay and will appreciate the reminder.
3. If you let them get two or more months past due without trying to contact them you are doing them a disservice. Every month makes their past due amount greater and greater, making it more and more difficult for them to catch up.
4. When contacting them you should have a mind set that you are there to help them, which they should pick up from your attitude (take two deep breathe before calling and think positive thoughts about them. Your first approach is to get them to pay the full amount due by a specific date, after which you will be contacting them to thank them for the payment (which you should always do for accounts that you *call*). If they cannot pay the full amount you should make them aware that it is OK, that these things happen, and then work out a new financial agreement that they and you can live with. You can only get so much from them and pushing it will get you nothing. Once you agree on the next series of payments, get a date when the payment will be made and tell them you will thank them for the payment. Make sure that they get a copy of the new financial agreement by email as soon as you get off the phone with them.
5. Most of all look forward to contacting them so that their problem (and yours) can be resolved amicably.

If you find it extremely distressing to go after past due accounts (which is obvious from a very large past due account amount) you might ask the doctor to allow you to work with a *helper* who can call them and resolve their accounts (someone with a stronger director style). You will still be in charge of the past due collections, but somebody else will be responsible for getting you their payments:

- You need to make sure that you give your helper all of the account information and specifics before the call.
- Get the amounts and dates of their payments from your helper so that you can follow up on their payments and notify your helper if they didn't pay.
- Then enter all of the new financial agreements into the computer and email the guarantor an official copy. It is best if your helper sends them an email delineating their agreement and payment dates.

Going after past due accounts need not be a negative experience if you have a positive attitude about working with them, which is what it is all about.