



SALES AND FINANCE

Payment follow-up sequence planner

A respectful sequence planner for following up on unpaid invoices with clear dates, ownership, and records.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

An invoice is overdue and you need a professional next step.

WORK THROUGH THE CHECKLIST

☐ 01 **Confirm due date and contact**

☐ 02 **Send a friendly reminder**

☐ 03 **State balance and payment method**

☐ 04 **Set the next follow-up date**

☐ 05 **Escalate according to terms**

☐ 06 **Record every contact**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.