[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Customer Contact Record Sheet

A single record of every customer contact, so any team member can pick up a conversation without asking the customer to repeat themselves.

Record period	[Start date of this record period] to [End date of this record period]
Team	[Name of the team using this record sheet]
Record owner	[Full name and job title of the record owner]

Contact register

Complete one row per contact, on the day the contact happens. Write what was actually discussed and agreed, not a general summary.

Date	Time	Customer name	Channel	Direction	Purpose of contact	Summary of discussion	Outcome	Follow-up owner	Follow-up due

Follow-up log

List every promise made during a contact, and mark it complete only when the customer has received what was promised.

Customer name	Promise or action agreed	Owner	Due date	Date completed	Customer informed

[Company name]

Period summary

Total contacts recorded	
Contacts by telephone	
Contacts by email	
Contacts by other channels	
Contacts needing follow-up	
Follow-ups completed on time	
Most common reason for contact	[Most common reason for contact this period]
Prepared by	[Full name and job title of the person who prepared this record]
Date prepared	[Date this record was prepared]