[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

[Company name]

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

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]