Ashford Business Services Ltd

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	9 November 2026 to 9 November 2026
Team	Sarah Mitchell
Record owner	James Patel

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.

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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	November 2026
Prepared by	Sarah Mitchell
Date prepared	9 November 2026