[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. 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: _____ **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

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: _____

Prepared by: _____ **Date prepared:** _____