

Date	Ph/Mtg/Email	Name/title	Called/Rcvd (C/R)	Reason for call	Discussed	follow-up (Y/N)

Type of conversation: Phone, meeting, informal encounter

Who the conversation was with: Name and title.

Who initiated the conversation: Did you contact them or did they contact you?

Reason for contact: What did the person who initiated the contact hope to accomplish?

Items discussed: Take notes on any important information discussed, as well as any personal or non-relevant information that might be useful.

Actions initiated: If something was asked for or planned on, write what it was, who is responsible and when you expect it to be completed.

Follow-up required: Write down anything you need --follow up action and/or contacting them again.