

Instructions for using the Contact Sheet

Make photocopies of the Contact Sheet for your use. Many of my clients think keeping them in a 3-ring binder alphabetically works best for them. Schedule follow up dates on a calendar, such as a smartphone. Alternatively, you can file the pages by date. Use ruled paper for continuation sheets. Periodically, review all the sheets to be sure no contact follow up was missed. If you have electronic contact software you prefer to use, incorporate the information on this Contact Sheet into your preferred software.

Name, Job title, Company, Address - Enter the name of the contact, their job title, employer and the employer's address.

Source - Enter the source of this contact – friend, work, or if the contact is from a referral, enter the name of the person making the referral. (Sometimes they may challenge you to make sure the referral is legit.)

Referral Date – If this is a referral, enter the date the person referred you to this contact.

Work tel. - Enter the work telephone number of the contact.

Home tel. – Enter the home telephone number of the contact, if available.

Cell/Mobile – Enter cell/mobile phone.

__ Enter the contact's preference for each of the telephone numbers – e. g., 1, 2, 3.

(Blank line) - Enter the name of the person's assistant or spouse and their contact number, if appropriate.

Email – Enter the contact's preferred email address.

Date resume sent - Enter the date you send or give the contact your resume.

Below the double line:

On the first line or two, describe information that you want to remember about this person, such as hobbies, articles they wrote, common interests, where you met, or anything else you can use that will help them remember you when you call again.

1. Enter the date of your first contact with this person (telephone call, meeting, etc.).
2. Enter a description of the substance of the conversation or activity, and indicate if there's something you should do next or how they will be able to help you.
3. Enter the date you plan to follow up with this contact. (Agree on a date and time for follow-up. Your next conversation should be a meaningful discussion of something pertinent.

Example:

3/21/19 - Called John. Mentioned that Sally Fuller at ABC Co suggested I contact you regarding [.....]
and to see if we could meet. Discussed my situation and what I'd like to meet about. John asked me to
call him again in two weeks as he's wrapping up a project. Call 4/11/19

(Enter a reminder on your calendar for 4/11/19 to call John. Before you call, review the Contact Sheet notes so you remember what you talked about and can remind him of your prior conversation. They will be very impressed that you remember what you talked about the last time.)