FRONTLINE PERFORMANCE SUPPORT / QUICK REFERENCE

Documenting customer interactions

A quick guide to clear, complete case notes

WHEN TO USE THIS GUIDE

Use this guide to document customer interactions clearly and concisely. Capture what was discussed, what you did, and what happens next. If the customer calls back, another teammate should be able to review your notes and understand what happened without asking the customer to repeat themselves.

01

Capture the reason for contact

Briefly describe why the customer reached out and the concern or request they shared.

02

Record what you verified

Note the relevant details you checked. Clearly separate confirmed information from assumptions.

03

Document the action taken

Record what you did, any information you provided, and whether the issue was resolved.

04

Confirm the next steps

Make sure the customer knows what happens next, who will follow up, and when. Include those details in your notes.

SEE THE DIFFERENCE

TOO VAGUE

“Called about payment. Advised.”

CLEAR & USEFUL

“Asked about missing payment; verified request date; sent for review. Update due Thursday.”

FINAL CHECK Could a teammate understand the interaction and next steps?

Fictional portfolio example • Not an official procedure