



PHONE CALL PREP SHEET

One call, start to finish. Five small steps.

ADMINARCADE.COM Life admin for people who hate it

TICKETS EARNED _____ / 5

1 per step you finish. Check off the box on a step, then count your boxes and write the number here.

BEFORE YOU DIAL

Steps 1 to 3. Fill these in before you pick up the phone.

1

THE NUMBER

DONE ☐

WHO I'M CALLING _____

PHONE NUMBER _____

WHERE I GOT IT _____

2

WHAT THEY'LL ASK FOR

DONE ☐

THE NUMBER THEY'LL WANT (account, member ID, model)

IN FRONT OF ME (check off what this call needs)

☐ Insurance card

☐ The bill or statement

☐ Model number

☐ Dates

☐ _____ anything else

3

MY ONE SENTENCE

DONE ☐

I'm calling because _____

WHAT I WANT TO HAPPEN _____

ON THE CALL

Step 4. Write while they talk. Messy counts.

4

WHO ANSWERED, AND WHAT THEY SAID

DONE ☐

WHO ANSWERED _____ REFERENCE OR TICKET NUMBER _____

WHAT THEY SAID

AFTER I HANG UP

Step 5. Do it before you put the pen down.

5

WHAT HAPPENS NEXT

DONE ☐

WHAT HAPPENS NEXT _____ BY WHEN _____

WHO DOES IT **me** / **them** (circle one) WHERE THIS SHEET GOES _____

CALL LOG

One row per call, so the notes all land in one place.

DATE	WHO I CALLED	WHO ANSWERED	REFERENCE #	WHAT'S NEXT, AND BY WHEN