



Tracking Minutes of Phone/Video Calls with Customers

It's important that verbal conversations/meetings with customers are recorded, so future members of the Design Team aren't missing information.

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Step 1 — Meet with the Customer



- During customer meetings, whether in-person, over the phone, or video call, it is important to take notes.
- Specifically, make sure to record:
 - What was presented
 - What options were discussed
 - What was agreed to (timeline, deliverables, cost estimates if applicable)

Step 2 — Recording Meeting Information



- Immediately after the meeting, it is important that this information is recorded.
- The best way to do so is to send a follow-up message to the customer in the ticketing system (HelpDesk/JitBit) recapping the meeting.
- That way, the information is there for everyone to see, reducing confusion both now and in the future.