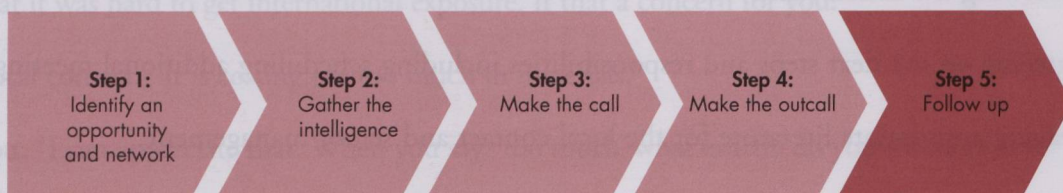


Step 5—Follow up

When you finish an outcall with a local contact you will need to follow up with that contact. To do so effectively, consider:

Have you...

- ✓ Sent a thank you note and follow-up message to your contact?
- ✓ Properly documented all the details from your meeting?
- ✓ Debriefed the team, or relevant staff about the meeting?
- ✓ Scheduled a follow-up meeting with the local contact?
- ✓ Determined with the local contact what the next steps will be and when they will take place?



5.1 Documenting the outcall

The outcall follow-up is critical in allowing you to organize and retain the information gathered during the outcall. The follow-up is also an opportunity for you to communicate again with the contact. You should compile detailed notes during outcalls, keeping records that identify dates of all telephone contacts, meetings, attempted contacts, emails, and faxes. These records should be tracked in TRIO.

Some of the information contained in your outcall documentation might have been obtained through the research that you conducted while preparing the initial call or the outcall. Nevertheless, the outcall will have confirmed and complemented this information, ensuring that the documentation on the local contact in the follow-up is as thorough as possible.