

SOP Template: Documenting Communication and Follow-Ups

This SOP provides guidelines for **documenting communication and follow-ups**, ensuring clear, accurate, and consistent records of all interactions. It covers proper methods for recording conversations, emails, and meetings, the importance of timely follow-ups, and maintaining organized communication logs. The goal is to enhance accountability, improve information tracking, and facilitate effective collaboration within the organization.

1. Purpose

To establish a standardized process for documenting all types of communications and ensuring effective and timely follow-ups within the organization.

2. Scope

This SOP applies to all employees who communicate internally or externally on behalf of the organization, including emails, phone calls, meetings, instant messages, and in-person conversations.

3. Responsibilities

- **All staff:** Accurately document communications and follow-ups as outlined below.
- **Supervisors/Managers:** Monitor compliance and provide guidance on documentation standards.
- **HR/Compliance team:** Review and update this SOP as needed.

4. Procedure

1. Recording Communication

- Use the designated communication log or CRM/system to record:
 - Date and time of interaction
 - Parties involved
 - Medium (e.g., email, phone, in-person)
 - Key discussion points, agreements, and action items
 - Attachments or reference documents, if applicable

2. Email Communication

- Save all relevant email threads in shared/project folders or the designated system.
- Summarize any critical decisions or agreed actions in the communication log, including reference to the original email.

3. Meetings

- Assign a note-taker to document meeting minutes.
- Include the date, attendees, topics covered, decisions made, and follow-up actions with responsible persons and deadlines.
- Share meeting minutes promptly with all relevant stakeholders.

4. Phone and In-Person Conversations

- Document key points and outcomes immediately following the interaction.
- Log the details in the designated system, following the same format as for written communication.

5. Follow-Ups

- Identify and record all action items, responsible persons, and due dates during discussions.
- Monitor progress in the communication log and send reminders as deadlines approach.

- After completion, record the resolution and close the loop in the log.

5. Communication Log Template

Date/Time	Parties Involved	Medium	Summary	Action Items / Follow-Ups	Status
2024-06-14 10:15 AM	Jane Doe, John Smith	Email	Discussed project timeline; agreed to submit draft by 6/20	John to send draft to Jane by 6/20	Open

6. Storage and Retention

- All communication records should be stored securely in the designated electronic system.
- Follow organizational policy for data retention and deletion timelines.
- Ensure only authorized personnel have access to sensitive or confidential communications.

7. Review and Improvement

- Supervisors should review communication logs periodically for completeness and accuracy.
- Continuous feedback should be encouraged to improve the documentation process.
- This SOP should be reviewed annually and updated as necessary.