CONTACT REPORT

TARGETED ADVERTISING GROUP

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Contact Report Number: TAG11106
This alphanumeric abbreviation identifies a specific Client and meeting date. Reports are numbered sequentially.

Meeting Date: Date the meeting took place

Report Date: Wednesday, November 01, 2006

Client Attendees: List by rank, using first initial and last name. If some titles unknown, list by title first then alphabetize the rest.

Agency Attendees:
List by rank, grouped by department as follows: Acct Mgt, Creative, Media, Research, IT, etc. Use first initial and last names.

cc: Integral people who were not a part of the meeting but who should be kept abreast of subject discussions.

Third Party Attendees: Alphabetize by last name/title

Location: If In Person, state where (e.g. TAG) If via electronic transmission, state how (e.g. Phone, Online, Tele/ Videoconference)

(DOCUMENTATION SECTION)

Subject:: **CONTACT REPORTS** The subject of the Contact Report is always BOLD and CAPITALIZED.

(MINUTES SECTION)

Begin a Contact Report by writing one or two sentences that summarize the purpose for writing. The purpose of this document is to demonstrate the standard format for Contact Reports as written at Targeted Advertising Group, Inc. as a tool for training Ad Agency account executives and others interested in standard format and procedures for preparation of an important management too in Advertising.

The primary topic of discussion appears in BOLD CAPS and is underlined as noted below:

CONTACT REPORTS
A Contact Report, or Conference Report as it is also called, is a written summary of interaction between an Advertising Agency and its Client that summarizes major discussions and agreements in a meeting. It serves the same function as formal minutes at a Board Meeting.

Contact Reports are considered legal documents as they are the “official” record of a meeting. They are sometimes called as evidence in court actions since they chronicle not only the circumstances (who, where, why) of a particular situation but also the What.

When writing a Contact Report, **it is important to identify who made a particular decision, held a point of view, was in agreement, or the like.**

In order to limit personal liability for a particular action, it became common in the advertising industry to not use individual names in Contact Reports, but rather the relational nomenclatures, “Agency” and “Client”. As such, no individual can be singled out for a costly directive or action.

All important but secondary topics in a Contact Report use upper and lower headings, BOLD, and are underlined. Notice that there is no space between the underlined heading and the discussion paragraph itself. This lack of space helps the reader focus on the topic at hand. Using 2 spaces between topics in lengthy Contact Reports gives the reader’s eyes a rest.

Purpose of a Contact Report
The purpose of a contact report is to document important topics, the salient discussion around those topics, decisions made, and future actions to be taken. These recaps of major agreements and discussions should be recorded in functional sections (e.g. Creative, Media, Research, etc).

Documenting details of a meeting, while seemingly simple, underestimates the challenge of writing a Contact Report. Not only must a Contact Report be accurate and complete, it should be written and distributed within 24-48 hours after the meeting takes place to be truly useful.

More than just a recitation of meeting talk, the Contact Report requires the Account Executive to wade through the myriad number of tabled and sidebar discussions that occur during a meeting, often simultaneously, to determine the critical project facts, dates, assignments that should be documented.

Every topic that surfaces in a meeting does not necessarily belong in the meeting’s Concept Report. Sometimes, an impromptu discussion on a totally different project or product matter may arise in a meeting. The Account Executive will determine if the discussion was of such importance to merit inclusion in the Contact Report. These off-topic discussions should be captured under the heading, OTHER (underlined and BOLD as a major topic) at the end of the Contact Report.

NEXT STEP — Writing the Contact Report — Due Date: 24 or 48 hours

Writing the Contact Report
The Contact Report has two main parts, the Documentation section (who, where, why) and the Minutes section (what). In general, the Contact Report should:

1. Recap major discussions and agreements
2. Document Next Steps needed to implement the agreements
3. State a Due date for each task

The Account Executive is usually responsible for writing the Contact Report but everyone on the Agency Team should take notes during a meeting (especially in areas of discussion directly affecting them). The AE may need to consult with others to insure the accuracy and completeness of his/her report.

In a one-on-one meeting situation, the AE should never neglect his/her note taking responsibility
Clients will respect your need to slow the pace of discussion so that notes can be written.

It is important that a Contact Report be accurate and detailed but written in a manner that respects the time constraints of busy business people. A Contact report is always written in an objective tone and in as concise a manner as possible. All effort should be made to use short, explanatory sentences.

The verb “stated” is probably the most repeated word in a Contact Report, i.e. Agency stated it will have a standard format for future Concept Reports. For variety and interest, use other synonyms in place of stated, such as:

Noted	**Voiced**	**Conveyed**	**Expressed**
Implied	**Thought**	**Touched on**	**Agreed**
Acknowledged	**Maintained**	**Confirmed**	
Announced	**Said**	**Reported**	
Indicated	**Emphasized**	**Told**	
Corroborated	**Affirmed**	**Reported**	

Be judicious in your use of emotive words such as "argued" or "insisted", remembering the overall objective character of Contact Reports.

Always always note when a Client "agreed" with an Agency suggestion, POV or recommendation as this might prove to be the Agency's strongest defense in an Agency/Client dispute.

NEXT STEP — Structure & Organization — Due Date: Immediately Following

Structure & Organization

Since there are mandatory elements in every Contact Report, it may seem that there is little room for individual expression and creativity. Far from true, the AE should make a Contact Report reflect her/his personal writing style. When writing a Contact Report, message clarity and flow is an important consideration. Use of writing organizational techniques is encouraged. A number of useful formatting techniques are very helpful in providing structure and organization in Contact Reports, including:

- indention
- Bullets
- Numbering
- **BOLD** typeface
- Underlining
- Italicizing

Key to their usage is consistency. If you begin to indent a paragraph for the purpose of recognizing it as a sub-topic, other sub-topics should likewise be indented. The AE must determine if the item being considered is truly a sub-topic or a bona fide major topic whose importance should be duly recognized in the Contact Report. Thus, the AE is the sole determinant of the importance of meeting topics covered in a Contact Report and in his structuring of the Report, acknowledges their importance.

NEXT STEP — Action Next Steps — Due Date: This Month, This Year

Action Next Steps

Next Steps are the action items that will guide both the Agency's and Clients work over the next several days or weeks ahead. Next Steps should detail exactly what the next action is and who is responsible for accomplishing that task, either Agency or Client, and when. The AE should make every effort to determine a realistic Due Date for action items. Try not to generalize on Due Dates unless absolutely necessary.

Depending on the basic form of the Contact Report, the AE may list Next Steps immediately after a sub-topic or leave them to the end of the Report. If the Report covers a great deal of diverse topics, it is helpful to have Next Steps immediately after each topic discussion write up.

If a single project was discussed, it might be more valuable to list all Next Steps at the end of the Report. Again, it is up to the AE as to where the Next Steps appear in the body of his/her Report. Wherever they appear however, you want them easily found so be sure to BOLD and capitalize every NEXT STEP(S) heading in a Contact Report.

NEXT STEP - Other Considerations — Due Diligence

OTHER CONSIDERATIONS

Check Spelling & Grammar. People's names should correctly spelled as should every word in your report. Review grammatical choices throughout the document. Limit use of passive verb tenses (use "will write" as opposed to "will be writing"). Use the present tense.

Add Page Numbers. Use the "Page X of Y" approach to insert Page Numbers and repeat the Report Number in the upper right corner of each additional page's header section.

Proof Read Carefully. Self-edit for clarity and accuracy before forwarding to your Supervisor to review prior to final distribution.

Exceptions Notice. Some firms adhere to guidelines regarding challenges to a Contact Report such as: Contact Reports are deemed accurate after 5 business days. Any concerns or corrections are requested in writing. The notice and the five-day grace date are provided at the end of the Concept Report.

Concept Report Book. Keep all Contact Reports in an account labeled binder by year for easy access

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