

The ask sheet

For asking an institution for something and having it hold. A name, a reference, a date.

Produces

A written record of every call that means you never have to start again from the beginning.

Time

Five minutes per call

Asks of you

Nothing. This sheet is yours. It never comes back to us.

A man dealing with a bank, an insurer, an agency, an employer, or a landlord who keeps losing track of what was promised. *Print several. One per call.*

Before the call

Who I am calling _____

What I am asking for, in one sentence _____

Account or case number _____

Say these

☐ Can I take your name?

☐ Can you give me a reference number for this call?

☐ What happens next, and by when?

☐ If I have not heard by then, who do I ask for?

During the call

Name of the person _____

Date and time _____

Reference number _____

What they said will happen, and by when

After

I will follow up on _____

If it has not happened, I will ask for _____