Contact Report Template

Here is an example of a Contact Report that Intelligence Officers use. You can use this in your business and modify it to suit your needs.

1. Date/Time/Place Of Contact:

2. Participants: Give the contact a Kryptonym. That can be anything you wish - Unicorn, Ramrod, etc. You choose just one word. This keeps her true name out of the reports from now on. From now on, we will refer to the person in this report as simply "O."

3. Accessibility: Anything that supports or hinders your access to person. "O stated she would meet anytime. O has a vehicle. O can meet most any Thursday."

4. Access: This is the big one in the spy world. What O has for us. Her access to the information and people we need and why she has this access. This will be fluid and will document how her access evolves and changes. What she does to gain access, etc.

5. Susceptibility/Motivation/Rapport: Why O is susceptible to work/meet with you. Things that may affect rapport. Things she does and things you do.

6. Personalia/Biodata: Updates to details about O. This includes her favorite food, drinks. It is the place to document data about her family members and friends etc.

7. Communications Data: You to her. Her to you. As things develop, you will factor in alternate modes and an emergency mode of comms.

8. Your Comments: This is where you can comment on all of the above and basically say whatever you want.

9. Next Meeting Details: Whenever possible, you never conclude a meeting without securing details for the next one.

10. News and Events: What local news, local events, etc. are taking place in the area that you need to know about to best connect with O.

As a rule of thumb, data that you gather should fit in one of the above categories. If not, you don't need it. Always use all headings even though some data may not change.