Interview Writeup Guideline and Abbreviations
[ENGLISH]

Nr.	Hint	Explanation
1	**Fill out company and contact details correctly**	This is a general guideline for the preparation of longlists. If the longlist includes additional details, the respective requirements need to be clarified with the project manager.
1.1	**ID**	Progressive number. Must not be changed during the calling process.
1.2	**Company name**	Spell the name correctly, including the capitalization of letters. If possible, include the legal form of the company (e.g. Inc., Ltd., GmbH).
1.3	**Homepage / URL**	Company website in common URL format: www.xyz.abc. Check that the URL link is working correctly and takes you to the homepage.
1.4	**Contact person**	Name and surname of the contact person. Check for correct spelling, especially when you are provided with the contact over the phone.
1.5	**Position**	Position or responsibility of the contact person within the organization. If unknown, find out during the interview.
1.6	**Phone**	Phone number with the direct line to the respective contact person. If unclear or unknown, find out during interview.
1.7	**E-mail**	Email of contact person. Check for correct spelling, especially if acquired via phone. Email address is especially important if you offer to provide the results of the study.
1.8	**Last contact**	Date when the contact has last been contacted. Update this every time you call the contact back! Keep track of the history with this contact in the "Comment" field
1.9	**Caller ID**	Usually corresponding to your initials. Fill this in for each contact you called.
1.10	**Status**	Update with the latest status of the contact. See below for possible status.
1.11	**Use comment box**	Add any relevant infomation regarding the call or the contact person. For example, you should indicate if the contact was very open for recall or provide an explanation for the Status 0 ("No interest"). You can also use this column for making notes about people you have talked to in order to get to the right contact. Professional language is also to be used for comments.
2	**Consider and adhere to layout as well as format**	The longlist has a pre-given layout and format which must not be changed. This is because there are often multiple team members working on a project and bringing individually changed lists back together costs extensive effort. Column with and line height may be adjusted. Example: Insert no additional columns (if additional columns are needed, insert at the right, indicate clearly with color and notify project manager).
3	**Client-ready working**	Client-ready working means that the entries are clearly formulated, standardized, and spell checked, so that the file can be sent out to the client without further adjustments.
4	**Keep tracking up-to-date**	The tracking has to be constantly up-to-date. Update status-number (0-5), date of the last contact, comments.
5	**Add and update names**	If there is no contact person indicated, only a number leading to the switchboard, the correct contact person has to be allocated, listed with name and position, ideally with the direct line.
6	**Add additional contacts**	If new contacts (not listed) are allocated for a company, list them in a new line at the end of the existing list, including the respective company information. In the comment box, indicate where the contact came from (e.g. Mr. X, from company Y working in the Z department, told me to call you, as...).
7	**Understand and use status numbers**	The Status-numbers are an important tool in order to structure the contacts and avoid calling somebody twice. You find an explanation of the status-numbers in the following paragraphs.

Status description

Status number	Description	Explanation
0	**IV denied**	The right contact was reached and the topic explained, but the interview was denied. Provide explanation in the comment box!
1	**IV conducted**	Successful call, interview conducted and finished. A write-up can be prepared.
2	**IV scheduled**	Appointment for an interview scheduled. Make notes in the Comment box and save the appointment in your calendar.
3	**Contacted / Pending / Action required**	The correct contact person was contacted but need to call back/take further action. (e.g. call back in 15 minutes/send an email/talk to the assistent/provide more information/...)
4	**Not reached**	Nobody picks up the phone. Need to call back.
5	**Not relevant**	It was discovered (through call/interview or secondary research) that the contact is not useful e.g. inexistent number/person is not knowledgeable/company not relevant/…