

**3. Phone Call Planner**

**How to use this document:** Plan for an important phone call you are making or waiting for. Say why it is important and what you want to say in it.

This planner has bits about what you want to say in your phone call. There are also sections for what you want to get from the phone call.

At the end, there is a section for what to do after the phone call and who can help you with it.

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| **What is the phone call about?** |
| In this section, say what the phone call is for. Example: “The phone call is about booking an appointment with an emergency dentist”  |
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| **Who am I calling?** |
| Please write the name, job title and phone number of the person or people you are calling. If it helps, write down the day and time of the phone call. Example: “Name: John Johnson”, “Job title: Mental Health Coordinator”  |
| Name: |   |
| Job title (if it’s relevant): |   |
| Phone number: |   |
| Day of call: |   |
| Time of call: |   |

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| **What do I want to say?** |
| Write about what you want to tell people in your phone call. Example: “The house I live in now is too cold and unsafe” |
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| **What do I want to happen?** |
| Write about what you want to happen on the phone and afterwards. Example: “I want to know if I can repay my debt in instalments” |
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| **Things I do not want to happen:** |
| Write about what you **don’t** want to happen in the phone call. Example “I don’t want to be told ‘no’ when asking for support” |
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| **Actions/Outcomes:** |
| Say what needs to happen after the phone call. Also say what has happened and when it was done by. Use the columns below to write them down. |
| Actions - What has happened e.g. “Fill in an application form” | By whom and when e.g. “By my advocate - on Friday 19th February” |
|   |   |
|   |   |
|   |   |
|   |   |
| **Notes: Write down anything else important that you think should go here. Example: “Check my bank balance to see if I have been paid”** |
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Our self-advocacy resources are inspired by those made by [**South West Advocacy Network (SWAN)**](https://swanadvocacy.org.uk/)