

CUSTOMER PROFILE

inspired by: Harvey Mackay

DATE _____

CUSTOMER

1. NAME _____ NICKNAME _____
2. COMPANY NAME _____
ADDRESS _____
3. HOME ADDRESS _____
4. TELEPHONE: BUSINESS _____ HOME _____
5. BIRTH DATE _____ PLACE _____ HOMETOWN _____
6. HEIGHT (approx.) _____ WEIGHT (approx.) _____

EDUCATION

7. HIGH SCHOOL _____ YEAR GRADUATED _____
COLLEGE _____ YEAR GRADUATED _____
8. COLLEGE HONORS _____ DEGREES _____
9. COLLEGE FRATERNITY/SORORITY _____ SPORTS _____
10. COLLEGE EXTRACURRICULAR ACTIVITIES _____
11. IF CUSTOMER DIDN'T ATTEND COLLEGE, IS HE/SHE SENSITIVE ABOUT IT? _____
12. MILITARY SERVICE _____ DISCHARGE RANK _____
ATTITUDE TOWARD BEING IN THE SERVICE _____

FAMILY

13. SPOUSES NAME _____ OCCUPATION _____
 14. SPOUSES EDUCATION _____
 15. SPOUSES INTERESTS _____
 16. ANNIVERSARY _____
 17. CHILDREN, IF ANY, NAMES/AGES _____
 18. CHILDREN'S EDUCATION _____
 19. CHILDREN'S INTERESTS (HOBBIES, PROBLEMS, ETC.) _____
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BUSINESS BACKGROUND

20. **PREVIOUS EMPLOYMENT (Most recent first)**
COMPANY _____
LOCATION _____
TITLE _____ DATES _____
COMPANY _____
LOCATION _____
TITLE _____ DATES _____
21. **PREVIOUS POSITIONS AT PRESENT COMPANY:**
TITLE _____ DATES _____
TITLE _____ DATES _____
22. **"STATUS" SYMBOLS IN OFFICE** _____
23. **PROFESSIONAL OR TRADE ASSOCIATIONS** _____

24. **OFFICES HELD OR HONORS** _____
25. **WHAT BUSINESS RELATIONSHIP DOES HE/SHE HAVE WITH OTHERS IN OUR COMPANY?** _____
26. **WHO ARE THEY?** _____
27. **IS IT A GOOD RELATIONSHIP? _____ WHY? _____**
28. **WHAT OTHER PEOPLE IN OUR COMPANY KNOW THE CUSTOMER?** _____
29. **TYPE OF CONNECTION _____ NATURE OF RELATIONSHIP _____**
30. **WHAT DO YOU FEEL IS HIS/HER LONG RANGE BUSINESS OBJECTIVE?** _____

31. **WHAT DO YOU FEEL IS HIS/HER IMMEDIATE BUSINESS OBJECTIVE?** _____

32. **WHAT DO YOU THINK IS OF GREATEST CONCERN TO THE CUSTOMER AT THIS TIME-THE WELFARE OF THE COMPANY OR HIS/HER OWN PERSONAL WELFARE?**

33. **DOES THE CUSTOMER THINK OF THE PRESENT OR THE FUTURE?** _____

SPECIAL INTERESTS

34. CLUB, PROFESSIONAL ASSOCIATIONS OR SERVICE CLUBS (Masons, Kiwanis, etc.)

35. POLITICALLY ACTIVE? _____ PARTY _____ IMPORTANT TO CUSTOMER _____
36. ACTIVE IN COMMUNITY? _____ HOW? _____
37. RELIGION _____ ACTIVE _____
38. HIGHLY CONFIDENTIAL/SENSITIVE ITEMS NOT TO BE DISCUSSED WITH
CUSTOMER (i.e.: Divorce, AA Member, etc.) _____
39. ON WHAT SUBJECTS (OUTSIDE OF BUSINESS) DOES THE CUSTOMER HAVE STRONG
FEELINGS? _____

LIFESTYLE

40. MEDICAL HISTORY (Current Condition of Health) _____
41. DOES CUSTOMER DRINK? _____ IF YES, WHAT AND HOW MUCH? _____
42. IF NO, IS CUSTOMER OFFENDED BY OTHERS DRINKING? _____
43. DOES CUSTOMER SMOKE? _____ IF NO, OBJECT TO OTHERS? _____
44. FAVORITE PLACES FOR LUNCH _____
DINNER _____
45. FAVORITE ITEMS ON MENU _____

46. DOES CUSTOMER OBJECT TO HAVING ANYONE BUY HIS/HER MEAL? _____
47. HOBBIES AND RECREATIONAL INTERESTS _____
48. VACATION HABITS _____
49. SPECTATOR SPORTS INTEREST: SPORTS AND TEAMS _____

50. WHAT KIND OF CAR(S) _____
51. CONVERSATIONAL INTERESTS _____
52. WHOM DOES THE CUSTOMER SEEM ANXIOUS TO IMPRESS? _____

53. HOW DOES HE/SHE WANT TO BE SEEN BY THOSE PEOPLE? _____

54. WHAT ADJECTIVES WOULD YOU USE TO DESCRIBE THE CUSTOMER? _____

55. WHAT IS HE/SHE MOST PROUD OF HAVING ACHIEVED? _____

56. WHAT DO YOU FEEL IS CUSTOMER'S LONG RANGE PERSONAL OBJECTIVE?

57. WHAT DO YOU FEEL IS THE CUSTOMER'S IMMEDIATE PERSONAL GOAL? _____

THE CUSTOMER AND YOU

58. WHAT MORAL OR ETHICAL CONSIDERATIONS ARE INVOLVED WHEN YOU WORK WITH THIS CUSTOMER? _____

59. DOES CUSTOMER FEEL ANY OBLIGATION TO YOU, YOUR COMPANY OR YOUR COMPETITION? _____

IF SO, WHAT? _____

60. DOES THE PROPOSAL YOU PLAN TO MAKE TO HIM/HER REQUIRE THE CUSTOMER TO CHANGE A HABIT OR TAKE AN ACTION THAT IS CONTRARY TO CUSTOM? _____

61. IS HE/SHE PRIMARILY CONCERNED ABOUT THE OPINION OF OTHERS? _____

62. IS HE/SHE VERY SELF-CENTERED? _____ HIGHLY ETHICAL? _____

63. WHAT ARE THE KEY PROBLEMS AS THE CUSTOMER SEES THEM? _____

64. WHAT ARE THE PRIORITIES OF THE CUSTOMER'S MANAGEMENT? _____

65. CAN YOU HELP WITH THESE PROBLEMS? _____ HOW? _____

66. DOES YOUR COMPETITOR HAVE BETTER ANSWERS TO THE ABOVE QUESTIONS THAN YOU HAVE? _____

ADDITIONAL NOTES
(attach pages if necessary)