

The Mackay 66

Customer Profile

It's critical to have information about your customer. Armed with the right knowledge, you can outsell, outmanage, outmotivate and outnegotiate your competition. Knowing your customer means knowing what your customer really wants. Maybe it's your product, but maybe there is something else, too: recognition, respect, reliability, service, friendship, help - things all of us care more about as human beings than we care envelopes. Once you attach your personality to the proposition, people start reacting to the personality, and stop reacting to the proposition.

Use this questionnaire to develop a profile of each customer. Some of your resources for the information might include receptionists, suppliers, newspapers, assistants, trade publications, and the customers themselves. Look, listen, and learn all you can about the customer, both personally and professionally. You'll find topics for opening conversations, which can open doors for you and your company.

Date _____

Customer

1. Name

Nickname

2. Company name

3. Address

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. Spouse's name and occupation

14. Spouse's education

15. Spouse's interests

16. Anniversary

17. Children, if any, names/ages

18. Children's education

19. Children's interests (hobbies, problems, etc.)

Business Background

20. Previous employment: (most recent first)

Company

Location

Title

Dates _____

Company

Location

Title

Dates _____

21. Previous positions at present company:

Title

Dates _____

22. "Status" symbols in office

23. Professional/trade

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. Clubs, fraternal 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 the 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 the 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?

66. Does your competitor have better answers to the above questions than you have?

(Attach pages for additional notes if necessary)