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CUSTOMER INFORMATION

NAME (NICKNAME)		
COMPANY NAME		
COMPANY ADDRESS		
CITY		
HOME ADDRESS		
BUSINESS PHONE	HOME PHONE	
BIRTHDATE PLACE HOMETOWN		
HEIGHT WEIGHT:		
EDUCATION INFORMATION		
	YEAR GRADUATED	
COLLEGE	YEAR GRADUATED	
COLLEGE HONORS	DEGREES	
COLLEGE FRATERNITY/SORORITY		
SPORTS		
COLLEGE EXTRACURRICULAR ACTIVITIES		
IF CUSTOMER DIDN'T ATTEND COLLEGE, IS HE/ SENSITIVE ABOUT IT?	/SHE	
MILITARY SERVICE	DISCHARGE RANK	
ATTITUDE TOWARD BEING IN THE SERVICE		
FAMILY INFORMATION		
SPOUSE'S NAME	- OCCUPATION	
SPOUSE'S EDUCATION	SPOUSE'S INTERESTS	
ANNIVERSARY		
CHILDREN, IF ANY, NAMES/AGES		
CHILDREN'S EDUCATION		
CHILDREN'S INTERESTS (HOBBIES, PROBLEMS,	ETC.)	





PREVIOUS EMPLOYMENT (Most recent first) COMPANY	
LOCATION	
TITLE	- DATES
COMPANY	
LOCATION	
TITLE	DATES
PREVIOUS POSITIONS AT PRESENT COMPANY: TITLE	DATES
TITLE	_ DATES
"STATUS" SYMBOLS IN OFFICE	
PROFESSIONAL OR TRADE ASSOCIATIONS	
OFFICES HELD OR HONORS	
WHAT BUSINESS RELATIONSHIP DOES HE/SHE HAVE WITH OTHERS IN OUR COMPANY?	
WHO ARE THEY?	
IS IT A GOOD RELATIONSHIP?	
WHY?	
WHAT OTHER PEOPLE IN OUR COMPANY KNOW THE CUSTOMER?	
TYPE OF CONNECTION	
NATURE OF RELATIONSHIP	
WHAT DO YOU FEEL IS HIS/HER LONG RANGE BUSINESS OBJECTIVE	
WHAT DO YOU FEEL IS HIS/HER IMMEDIATE BUSINESS OBJECTIVE	
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?	
DOES THE CUSTOMER THINK OF THE PRESENT OR THE FUTURE?	





SPECIAL INTERESTS

CLUB, PROFESSIONAL ASSOCIATIONS OR SERVICE CLUBS (Masons, Kiwanis, etc.)
POLITICALLY ACTIVE?
PARTY
ACTIVE IN COMMUNITY? HOW?
RELIGION ACTIVE
HIGHLY CONFIDENTIAL/SENSITIVE ITEMS NOT TO BE DISCUSSED WITH CUSTOMER (i.e.: Divorce, AA Member, etc.)
ON WHAT SUBJECTS (OUTSIDE OF BUSINESS) DOES THE CUSTOMER HAVE STRONG FEELINGS?
LIFESTYLE
MEDICAL HISTORY (Current Condition of Health)
DOES CUSTOMER DRINK?
IF YES, WHAT AND HOW MUCH?
IF NO, IS CUSTOMER OFFENDED BY OTHERS DRINKING?
DOES CUSTOMER SMOKE?

IF NO, OBJECT TO OTHERS?_____

FAVORITE PLACES FOR LUNCH_____

DINNER

FAVORITE ITEMS ON MENU

DOES CUSTOMER OBJECT TO HAVING ANYONE BUY HIS/HER MEAL?

HOBBIES AND RECREATIONAL INTERESTS

VACATION HABITS?



SPECTATOR SPORTS INTEREST: SPORTS AND TEAMS
WHAT KIND OF CAR(S)
CONVERSATIONAL INTERESTS
WHOM DOES THE CUSTOMER SEEM ANXIOUS TO IMPRESS?HOW DOES HE/SHE WANT TO BE SEEN BY THOSE PEOPLE?
WHAT ADJECTIVES WOULD YOU USE TO DESCRIBE THE CUSTOMER
WHAT IS HE/SHE MOST PROUD OF HAVING ACHIEVED?
WHAT DO YOU FEEL IS CUSTOMER'S LONG RANGE PERSONAL OBJECTIVE?
WHAT DO YOU FEEL IS THE CUSTOMER'S IMMEDIATE PERSONAL GOAL?
THE CUSTOMER AND YOU
WHAT MORAL OR ETHICAL CONSIDERATIONS ARE INVOLVED WHEN YOU WORK WITH THIS CUSTOMER?
DOES CUSTOMER FEEL ANY OBLIGATION TO YOU, YOUR COMPANY OR YOUR COMPETITION?
IF SO, WHAT?
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?
IS HE/SHE PRIMARILY CONCERNED ABOUT THE OPINION OF OTHERS?
IS HE/SHE VERY SELF-CENTERED?
HIGHLY ETHICAL?
WHAT ARE THE KEY PROBLEMS AS THE CUSTOMER SEES THEM?
WHAT ARE THE PRIORITIES OF THE CUSTOMER'S MANAGEMENT?
CAN YOU HELP WITH THESE PROBLEMS?
DOES YOUR COMPETITOR HAVE BETTER ANSWERS TO THE ABOVE QUESTIONS THAN YOU HAVE?