

**MACKAY ENVELOPE CORPORATION
66-QUESTION CUSTOMER PROFILE**

Date _____

Last updated _____

By _____

Customer

1. Name _____ Nickname _____

Title _____

2. Company name and address _____

3. Home address _____

4. Telephone: Business _____

Home _____

5. Birth date and place _____

Hometown _____

6. Height _____ Weight _____

Outstanding physical characteristics _____

(Examples: balding, great condition, arthritis, severe back problems, etc.)

Education

7. High school and year _____

College _____

Graduated when _____ Degrees _____

8. College honors _____ Advanced degrees _____

9. College fraternity or sorority _____

Sports _____

10. Extracurricular college activities _____

11. If customer didn't attend college, is he/she sensitive about it? _____

What did they do instead? _____

12. Military service _____ Discharge rank _____

Attitude toward being in the service _____

(Continued)

31. What is his/her immediate business objective? _____

32. What 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? _____
Why? _____

Special Interests

34. Clubs or service clubs (Masons, Kiwanis, etc.) _____

35. Politically active? _____ Party _____ Importance to customer _____

36. Active in community? _____ How? _____

37. Religion _____ Active? _____

38. Highly confidential items NOT to be discussed with the customer (for example, divorce, member of AA, 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, 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 the customer object to having anyone buy his/her meal? _____

47. Hobbies and recreational interests _____

What does the customer like to read? _____

48. Vacation habits _____

49. Spectator-sports interest: sports and teams _____

50. Kind of car(s) _____

51. Conversational interests _____

52. Who does the customer seem anxious to impress? _____

Family

- 13. Marital status _____ Spouse's name _____
- 14. Spouse's education _____
- 15. Spouse's interest/activities/affiliations _____
- 16. Wedding anniversary _____
- 17. Children, if any, names and ages _____

- Does client have custody? _____
- 18. Children's education _____
- 19. Children's interests (hobbies, problems, etc.) _____

Business Background

- 20. Previous employment: (most recent first)
 - Company _____
 - Location _____
 - Dates _____ Title _____
 - Company _____
 - Location _____
 - Dates _____ Title _____
- 21. Previous position at present company: Title _____
Dates: _____
- 22. Any "status" symbols in office? _____
- 23. Professional or trade associations _____
Office or honors in them _____
- 24. Any mentors? _____
- 25. What business relationship does he/she have with others in our company? _____

- 26. Is it a good relationship? _____ Why? _____

- 27. What other people in our company know the customer? _____

- 28. Type of connection _____ Nature of relationship _____

- 29. What is client's attitude toward his/her company? _____

- 30. What is his/her long-range business objective? _____

(Continued)

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 the 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. Or 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? _____

Any conflicts between the customer and 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