

Mackay 66 Profile

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 Service



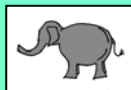
13. Spouse's Name and Occupation
14. Spouse's Education
15. Spouse's Interests
16. Anniversary
17. Children, if any, Names/Ages
18. Children's Education
19. Children's Interests (Hobbies, Problems, Etc.)

Family



Business Background

20. Previous Employment (Most Recent First):
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 the 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 (Mason's, 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 the competition? If so, what?
60. Does the proposal you plan to make 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?