



# 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 about 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

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18. Children's education

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

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## BUSINESS BACKGROUND

20. Previous employment: (most recent first)

Company

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Location

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Title

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Dates \_\_\_\_\_





Company

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Location

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Title

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Dates \_\_\_\_\_

21. Previous positions at present company:

Title

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Dates \_\_\_\_\_

22. "Status" symbols in office

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23. Professional/trade

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24. Offices held or honors

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25. What business relationship does he/she have with others in our company?

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26. Who are they?

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27. Is it a good relationship? Why?

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28. What other people in our company know the customer?

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29. Type of connection

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Nature of relationship

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30. What do you feel is his/her long-range business objective?

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31. What do you feel is his/her immediate business objective?

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32. What do you think is of greatest concern to the customer at this time -- welfare of the company or his/her own personal welfare?

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33. Does the customer think of the present or the future?

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## 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?

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42. If no, is customer offended by others drinking?

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43. Does customer smoke? If no, object to others?

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44. Favorite places for lunch:

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Dinner

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45. Favorite items on menu

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46. Does customer object to having anyone buy his/her meal?

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47. Hobbies and recreational interests

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48. Vacation habits

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49. Spectator sports interest: sports and teams

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50. What kind of car(s)

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51. Conversational interests

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52. Whom does the customer seem anxious to impress?

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53. How does he/she want to be seen by those people?

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54. What adjectives would you use to describe the customer?

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55. What is he/she most proud of having achieved?

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56. What do you feel is the customer's long-range personal objective?

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57. What do you feel is the customer's immediate personal goal?

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## THE CUSTOMER AND YOU

58. What moral or ethical considerations are involved when you work with this customer?

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59. Does the customer feel any obligation to you, your company or your competition?  
If so what?

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60. Does the proposal you plan to make to him/her require the customer to change a habit or take action that is contrary to custom?

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61. Is he/she primarily concerned about the opinion of others?

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62. Is he/she very self-centered?

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Highly ethical?

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63. What are the key problems as the customer sees them?

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64. What are the priorities of the customer's management?

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65. Can you help with these problems?

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

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(Attach pages for additional notes if necessary)

