
The Stott 58 Client Profile to Invite and allow RELATIONSHIP

It's critical to have information about your clients, potential clients, and potential referral sources. When you have the right knowledge, you develop TRUST, which is far more important than any product you sell. You don't have to beat competition... you just need to go around them. You hold the KEYS when you know the People. Knowing them means knowing what makes them happy. Human nature leans toward creating happiness, however THEY define happiness. Maybe it's your product, and it's also ***always*** something else, too: Recognition, Respect, Reliability, Service, Friendship, Status, Convenience, and Help - things all of us care more about as human beings more than we care about any product. Once you attach your caring and personal knowledge of them to your product, people start seeing you differently.

Use this questionnaire to develop a profile of each client, potential client, and potential referral source. Some of your resources for the information might include the internet (Facebook, Linked In, a general Google Search). Other resources could include mutual friends or their own co-workers or employees. You of course can ask them personally as well. Look, listen, and learn all you can about them both personally and professionally. You'll find topics for opening conversations, which can open doors for you and your company.

Dates you gather the information: Start Date: _____ End Date: _____

The Client, Potential Client, or Referral Source

1. Name

Nickname

2. Employer or Company name

3. Business Address

Home Address

4. Contact Information:

Work Number and Email:

Home Number and Email:

Cell Number and Email:

Where do they hang out in Social Media (FB, LI, other?):

Where do they hang out online:

5. Birth date: _____

Place of Birth – Hometown – As an Aside....What did they want to be when they “grew up”

6. Height (approx.) _____

Weight (approx.) _____

Education

7. High school

Year graduated _____

College/University/Vocational/Outside traditional Higher Education if any:

Years graduated _____

Honors/Degrees _____

Fraternity/Sorority/Clubs _____

College Sports or Other Extracurricular Actives _____

8. If customer didn't attend college, are they sensitive about it? _____

9. Current or Prior Military or Other Service - Ranks - Accomplishments

Attitude toward being in Service

Family

10. Spouse's name and occupation

11. Spouse's education

12. Spouse's interests

13. Wedding Anniversary – Where married – Honeymoon Memories:

14. Children, if any, names/ages/ education

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

Business Background

16. Previous 2 Employers

Company, Location, Title, and Dates

Company, Location, Title, and Dates

17. Previous positions at current work:

Dates _____

18. Current Company Status Symbols (Head of Dept/Salesperson of the Year, etc.)

19. Professional/Career Status Symbols

20. Offices held or Honors

21. What business relationship does he/she have with others in our company? With whom?

22. Is it a good relationship? Why?

23. What other people in our company know about this person:

24. Type of connection with our Company

25. Nature of relationship from what you know now, what is his/her long-range business objectives?

26. What about immediate business objectives?

27. What do you think is of greatest concern currently - their work or personal goals?

28. Does the customer think more in terms of the present... or the future?

Special Interests

29. Clubs, fraternal associations, or service clubs (Knight of Columbus, Optimist Club, etc.)

30. Are they Politically active? _____

Party: _____

Important to customer? _____

31. Active in community? How?

32. Religion _____

Active? _____

33. Highly confidential/sensitive items *not* to be discussed with customer (i.e.:
Divorce, AAmember, etc.)

34. On what subjects (outside of business) does the customer have strong feelings?

Lifestyle

35. Health, Current and Past:

36. Does customer drink? If yes, what, and how much? If no, is customer offended by others drinking?

37. Favorite Things in General: Color, Flowers, Candy, Wine/Spirts, Games, Television, Movies, what they like to do with free time, etc.

38. Favorite places for lunch and dinner including favorite menu items:

39. Does customer object to having anyone buying them a meal? _____

40. Vacations from the past and Favorite Destination Vacation Wish/Dream/Fantasy and a description of what they would do on that trip:

41. Hobbies and recreational interests including Sports and Favorite Teams:

42. What Charities or Causes are they passionate about?

43. What kind of car do they own and/or aspire to?

44. What do they want to do when they retire?

45. What kind of home do they own and/or aspire to if money were no object – buy with lottery winnings sort of home?

46. Who is the most important person this person wants to impress?

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

48. What adjectives would you use to describe this person?

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

50. What is this person's long-range personal objectives and goals?

The Customer and You

51. What moral or ethical considerations are involved with this person?

52. Does this person feel any obligation to you, your company, or to your competition? If so, what?

53. Does the Offer you plan to make to him/her require them to change a habit or take an action that is contrary to what they are used to?

54. Is he/she primarily concerned about the opinion of others or more self-centered?

Are they Highly ethical?

55. What are the key problems this person has before them now... or coming up in their lives?

56. How can you help with these problems? Connect them with others? Solve with your product?

57. What do believe motivates them more: Love? Status/Self-Esteem? Money? Safety/Security?

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

(Attach pages for additional notes if necessary)