

**MACKAY 66**  
**CUSTOMER PROFILE**

DATE \_\_\_\_\_

**CUSTOMER**

1. NAME \_\_\_\_\_ NICKNAME \_\_\_\_\_
2. COMPANY NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_
3. 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. SPOUSES NAME \_\_\_\_\_ OCCUPATION \_\_\_\_\_
  14. SPOUSES EDUCATION \_\_\_\_\_
  15. SPOUSES INTERESTS \_\_\_\_\_
  16. ANNIVERSARY \_\_\_\_\_
  17. CHILDREN, IF ANY, NAMES/AGES \_\_\_\_\_
  18. CHILDREN'S EDUCATION \_\_\_\_\_
  19. CHILDREN'S INTERESTS (HOBBIES, PROBLEMS, ETC.) \_\_\_\_\_
-

**BUSINESS BACKGROUND**

20. **PREVIOUS EMPLOYMENT (Most recent first)**

COMPANY \_\_\_\_\_

LOCATION \_\_\_\_\_

TITLE \_\_\_\_\_ DATES \_\_\_\_\_

COMPANY \_\_\_\_\_

LOCATION \_\_\_\_\_

TITLE \_\_\_\_\_ DATES \_\_\_\_\_

21. **PREVIOUS POSITIONS AT PRESENT COMPANY:**

TITLE \_\_\_\_\_ DATES \_\_\_\_\_

TITLE \_\_\_\_\_ DATES \_\_\_\_\_

22. **"STATUS" SYMBOLS IN OFFICE** \_\_\_\_\_

23. **PROFESSIONAL OR TRADE ASSOCIATIONS** \_\_\_\_\_

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 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?** \_\_\_\_\_

**SPECIAL INTERESTS**

34. CLUB, PROFESSIONAL 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? \_\_\_\_\_
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 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 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. 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? \_\_\_\_\_ HOW? \_\_\_\_\_

66. DOES YOUR COMPETITOR HAVE BETTER ANSWERS TO THE ABOVE QUESTIONS THAN YOU HAVE? \_\_\_\_\_

### ADDITIONAL NOTES

(attach pages if necessary)

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