

**Mackay Envelope Company  
66-Question Customer Profile**

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 years \_\_\_\_\_

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 \_\_\_\_\_ Discharge Rank \_\_\_\_\_

Attitude toward being in the service \_\_\_\_\_

13. Marital status \_\_\_\_\_ Spouse's/Partner's name \_\_\_\_\_

14. Spouse's/Partner's education \_\_\_\_\_

15. Spouse's/Partner's interests/activities/affiliations \_\_\_\_\_

16. Wedding anniversary \_\_\_\_\_

17. Children, if any, names and ages \_\_\_\_\_

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**Does client have custody?**

**More and more, children do not come from traditional family structures. Notes on parents, names, etc.** \_\_\_\_\_

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**18. Children's education** \_\_\_\_\_

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

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

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26. Is it a good relationship? \_\_\_\_\_ Why? \_\_\_\_\_

27. What other people in our company know the customers? \_\_\_\_\_

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? \_\_\_\_\_

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 customer think of the present or the future? \_\_\_\_\_

### Special Interests

34. Clubs or service clubs (Rotary, Kiwanis, Greenpeace, Amnesty International, etc.) \_\_\_\_\_

35. Politically active? \_\_\_\_\_ Party \_\_\_\_\_

Importance to customer \_\_\_\_\_

36. Active in the community? \_\_\_\_\_ How? \_\_\_\_\_

37. Religion \_\_\_\_\_ Active? \_\_\_\_\_

38. Highly confidential items *NOT* to be discussed with customer (for example, divorce, member of AA, etc.) \_\_\_\_\_

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

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## 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. If the customer doesn't smoke, how strenuously does he/she object to being around people or in places where smokers are? \_\_\_\_\_

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44. Favorite places for lunch \_\_\_\_\_ Dinner \_\_\_\_\_

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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What does the customer like to read? (including favorite websites) \_\_\_\_\_

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48. Vacation habits \_\_\_\_\_

49. Spectator-sports interest: sports and teams \_\_\_\_\_

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50. Kind of car(s) \_\_\_\_\_

51. Conversational interests \_\_\_\_\_

52. Whom does 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 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 customer's long-range personal objective? \_\_\_\_\_

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

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### **The Customer And You**

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

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59. Does customer feel any obligation to you, your company, or your competition?

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If so, what? \_\_\_\_\_

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

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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 customer sees them?

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

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**Any conflicts between 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?**

\_\_\_\_\_

**Have you done a Google search of the customer on the web?** \_\_\_\_\_

**Are important pieces of data attached?** \_\_\_\_\_

**Further Notes:**