

## **NEED TO KNOW**

**"What do I need to know about my client data base?" you ask.**

### **Individual**

- 1. Favorite sports teams**
- 2. Favorite participant sport**
- 3. Type of car owned and liked most (may be different)**
- 4. Type of pet**
- 5. Hobbies (special interests that are done with passion)**
- 6. Favorite magazine**
- 7. Favorite movie**
- 8. Last books read (both enjoyment and personal development)**
- 9. Leisure activities (weekend things)**
- 10. Last vacation - where? why? Next vacation - where? why?**
- 11. Courses taking now - personal development**
- 12. Favorite Restaurant**
- 13. Favorite Food**
- 14. Last seminar attended**
- 15. Office status symbols - note and discuss awards or unique items.**

### **Personal**

- 16. Prime goal - personal**
- 17. Awards won**
- 18. Hometown**
- 19. Birthday**
- 20. Present place of residence**
- 21. Marital status (name of significant other)**
- 22. Prejudices**
- 23. Key views on important issues**
- 24. Type of humor (if any)**
- 25. How he or she got started in business**
- 26. How he or she got started in their career**
- 27. College(s) attended**
- 28. Country Club member of**
- 29. Other places lived**
- 30. Other places worked**
- 31. Belief or faith**

### **Family**

- 32. Number of kids (in school? which one? studying what?)**
- 33. Children's achievements**
- 34. Children's activities**

## **Business**

- 35. Prime goal - business (biggest issues)**
- 36. Biggest competitor**
- 37. Trade publications read**
- 38. Trade association involvement**
- 39. Civic/community organization involvement**
- 40. Previous personal experiences and dealings with your type of product**