

90 + Things You Should Know About Every Client

Client Profile

Basic information for your CRM system

Name Company

Contact (Buyer)

Title

Category (A-B-C)

Revenue

Percentage of total revenues

Last contact

Next contact

Email

Phone: Direct – Mobile - Office

Website / LinkedIn/Twitter

Address Mailing Address

Industry

ANZSIC Code (s)

Description

Client since

Source (where did they come from)

Professional Background

1. Describe your position?
2. How long have you owned or been with your company?
3. Describe your background -- what did you do before you started, bought or came into this business?
4. Describe exactly who the owner or owners are?
5. What people, books, and life factors have influenced and impacted you in your career?
6. What are your goals?
7. What initially got you started in your business? (What motivation, occurrence, etc.?)
8. How have your methods for doing business, or the product(s) or service line(s) you market, changed since the inception of your business?
9. What do you do when you're not at the office?
10. Describe your family. Are you married? Are you divorced? How many children do you have?

11. What is the greatest life achievement you have achieved so far?
12. What one thing, more than anything else, do you want to accomplish in your business before you get out?
13. Where do you see your industry in five years?
14. What is your vision for your business for the next: 6 Months: 1 Year: 3-5 Years: 10 Years?

Business Profile

15. Describe what your business does completely. Products and services, you sell and how you sell them? Who do you sell to by industry?
16. Specific niche?
17. Where does most of your business come from?
18. Product or service?
19. Category of customer?
20. Geography?
21. Who has the highest propensity of buying from you?
22. What is your business philosophy as it relates to your customers?
23. When was the last time you introduced a new product or service to your market (both existing customers and prospects)? • How well did it work?
24. Describe your company's general infrastructure.
 - What Departments do you have? Operations/Marketing/Sales/Legal/HR etc.

25. Who runs things? Who are the decision makers? (For example: "I own the business but I'm never there, and I defer to my manager.")

****Company Infrastructure Diagram****

26. Please provide a visual diagram of your current organizational structure

27. How do you explain your company to someone outside your industry?

28. Describe your company in one sentence.

29. How do you explain your company to someone in the industry (i.e. to a potential buyer or client)? This is the "company pitch," NOT the product pitch

Client Base

30. How many active customers do you have?

31. Exactly what kind of data do you have on them? (Include everything you know about your customers: names, addresses, telephone numbers, fax numbers, e-mail addresses, types of businesses, location, what and when they have bought from you, how you attracted them, the last date of contact with them, etc.)

32. How many "dream" clients are there (that 20% that would drive 80% of your sales)?

33. What does it cost you to set a new customer? (E.g. if you ran an advertisement that costs \$1,000 and you attained two new customers it would be \$500.)

34. What are the average sales and profits generated from a new customer in the first year? How is that information useful in your overall marketing strategy?

35. What's the "lifetime value" of your typical customer? (I.e. how much revenue will he/she generate for you over the entire period he/she does business with your company?)

36. Explain where all your business is coming from (demographics), versus where all your time is being spent.

37. What is your biggest and best source of new business?

38. As a percentage, how much of your business comes from referrals?

Sales Force

39. Selling infrastructure:

40. Describe Your Sales team

41. Do you have inside sales - people?

42. Who does what?

43. What the best excels at and what the worst excels at?

44. What their strengths and weaknesses are and where they're utilized.

45. What is your average order amount?

46. What are your sales (gross and net income) per salesperson? Is that above, below, or equal to your industry average and what are the steps you are taking (or going to take) to improve?

47. What are the standards for hiring salespeople?

48. What other training do you offer? (i.e. Product training, Account management training, or Time management training)?

49. How is it offered (Internally, Externally, etc.)?

50. How often is training provided?

51. What is the turnover rate for salespeople?
52. Describe the typical sales cycle to close a sale (i.e. from generating the lead through to a close):
 - a. How many contacts does it take to close a sale?
 - b. How many different people do you usually meet with to close a sale?
53. Describe the length of cycle from initial contact to close?
54. What are the most frequent objections you hear?
55. If you target 10 prospects, how many will you close? (Provide the closing ratio.)
56. As a percentage, with how many clients are you dealing directly with the top decision maker?
57. What are the top three reasons that a prospect would do nothing at the end of the sales cycle?
58. What do you do with the prospects you don't close?
59. How do your closing ratios fare against that of competitors?
60. Do you utilize another form of direct sales (i.e. independent sales reps, dealers, manufacturer's reps)? If you do, have you ever compared the results to an inside or outside sales force?
61. Do you go to trade shows? What do you do, and how do you show? What is your preparatory approach? What promotions do you do in conjunction with trade shows?
62. What is your selling presentation?
63. How many unsold prospects do you have?

64. What sales functions did you perform when you started your business?
65. Do you add on other products or future products or services (up sell)?
66. How long does it take you to fill an order after you receive it? If you improved, would it have a dramatic effect on your sales?
67. Is "buyer's remorse" a current problem in your business? If so, how do you overcome it?
68. Do your customers feel your customer service department is prompt and courteous? Explain.

Marketing

69. What is your target market and how did you arrive at it?
70. What is your market potential (universe)? What is your current share of that market?
71. Does your business market locally, regionally, nationally, or internationally?
72. What change is required to satisfy the projected vision of your business?
73. Describe the company's marketing philosophy.

Strategic Partners

74. What strategic alliances do you currently have?
75. What strategic alliances did you have in the past? • How did they fare? • How did they affect your business

76. Who stands to gain more than you if you grow? (I.e. Companies whose' products/services are purchased after your products/services are purchased. Companies whose' products/services are concurrently purchased with your product/service?)
77. Who are your suppliers or other providers of products or services that benefit massively when you are successful?
78. Unique Selling Proposition (USP)
79. What do you believe your single most competitive advantage?
80. What problem does your product or service solve for the customer?
81. Describe your customer's needs and the positive results your product/service provides.
82. What is your Unique Selling Proposition or USP?
83. Why do your customers buy from you?
84. What is it about your product and/or service that distinguishes you from your competition?
85. Why must a prospect buy your product or service?

Competition Profile

86. Describe all you know about your competitors
87. Where are the top 3 located?
88. What do they do best?
89. What do they do worst?

90. How do you specifically fill that void?

91. What do they offer that you do not?

92. What steps do you take to offset their advantage?

93. What is the biggest customer complaint about your industry? How does your company address this problem?