

Lipsey's 55

"My Clients are my friends and my friends are my Clients" – Tom Joyce

CUSTOMER

1. NAME _____ NICKNAME _____
2. COMPANY NAME _____
3. COMPANY ADDRESS _____
4. HOME ADDRESS _____
5. TELEPHONE: BUSINESS _____ CELL _____
6. BIRTH DATE _____ PLACE _____
7. HAT SIZE _____ SHOE SIZE _____ SHIRT SIZE _____

EDUCATION

8. HIGH SCHOOL _____
9. COLLEGE _____
10. COLLEGE FRATERNITY/SORORITY _____ SPORTS _____
11. COLLEGE EXTRACURRICULAR ACTIVITIES _____
12. MILITARY SERVICE _____

FAMILY

13. SPOUSES NAME _____ OCCUPATION _____
14. SPOUSES INTERESTS _____
15. ANNIVERSARY _____
16. CHILDREN, IF ANY, NAMES/AGES _____
17. CHILDREN'S COLLEGE EDUCATION (IF APPLICABLE) _____
18. CHILDREN'S INTERESTS _____

BUSINESS BACKGROUND

19. CAREER BACKGROUND (Most recent first)
COMPANY _____
LOCATION _____
TITLE _____ DATES _____
COMPANY _____
LOCATION _____
TITLE _____ DATES _____
20. OFFICE DÉCOR _____
21. ASSOCIATIONS / AFFILIATIONS _____
22. INTERVIEWS OR RECENT ARTICLES _____

23. WHAT BUSINESS RELATIONSHIP DOES HE/SHE HAVE WITH OTHERS IN OUR COMPANY? _____
24. WHO ARE THEY? _____
25. WHAT OTHER PEOPLE IN OUR COMPANY KNOW THE CUSTOMER? _____
26. TYPE OF CONNECTION _____ NATURE OF RELATIONSHIP _____
27. WHAT DO YOU FEEL IS HIS/HER LONG RANGE BUSINESS OBJECTIVE? _____
- _____
28. WHAT DO YOU FEEL IS HIS/HER IMMEDIATE BUSINESS OBJECTIVE? _____
- _____
29. WHAT DO YOU THINK IS THE BEST OPPORTUNITY TO WORK WITH THIS CLIENT? _____
- _____

SPECIAL INTERESTS

30. CLUB, PROFESSIONAL ASSOCIATIONS OR SERVICE CLUBS (Masons, Kiwanis, etc.) _____
31. POLITICALLY ACTIVE? _____ PARTY _____
32. ACTIVE IN COMMUNITY? _____ HOW? _____
33. SENSITIVE ITEMS NOT TO BE DISCUSSED WITH CUSTOMER (i.e.: Divorce, AA Member, etc.) _____
34. ON WHAT SUBJECTS (OUTSIDE OF BUSINESS) DOES THE CUSTOMER HAVE STRONG FEELINGS? _____

LIFESTYLE

35. FAVORITE PLACES FOR LUNCH _____
DINNER _____
36. FAVORITE ITEMS ON MENU _____
- _____
37. DOES CUSTOMER OBJECT TO HAVING ANYONE BUY HIS/HER MEAL? _____
38. HOBBIES AND RECREATIONAL INTERESTS _____
39. SPECTATOR SPORTS INTEREST: SPORTS AND TEAMS _____
40. ARE THEY INTO CARS? _____
41. CONVERSATIONAL INTERESTS _____
42. WHAT ADJECTIVES WOULD YOU USE TO DESCRIBE THE CUSTOMER? _____
- _____
43. WHAT IS HE/SHE MOST PROUD OF HAVING ACHIEVED? _____
- _____
44. WHAT DO YOU FEEL IS CUSTOMER'S LONG RANGE PERSONAL OBJECTIVE? _____
- _____
45. WHAT DO YOU FEEL IS THE CUSTOMER'S IMMEDIATE PERSONAL GOAL? _____
- _____

THE CUSTOMER AND YOU

46. WHAT ARE THE PRIORITIES OF THE CUSTOMER'S MANAGEMENT? _____

47. WHAT SERVICE LINES CAN YOU SUGGEST? _____

48. FINANCIAL METRICS: EARNINGS PER SHARE _____ NOI _____
 FUNDS FROM OPERATIONS _____ CASH FLOW _____ NPVF _____

49. DO THEY SEE THE BIG PICTURE OR DETAILS? _____

50. COGNITIVE STYLE:

COGNITIVE STYLE	DEFITITION	YES / NO
EXTRAVERT	Processing information through social interaction, schedule more face to face meetings vs sending memos and written communication	
INTROVERT	Develops ideas and makes decisions in isolation, responds after reflection, prefers written form of communication to presentations / meetings	
SENSING	Focuses on details, learns experientially, "knows" something because she/he has seen or experienced it	
INTUITIVES	Learns theoretically, sees similarities between two concepts, "knows" something because it is a logical deduction or extension of a theory/concept	
THINKING	Decides analytically by examining facts, logical, objective, examines cause and effects beliefs to make decisions	
FEELING	Decides on the basis of feeling, uses logic to support feelings, relies on the affective component of attitude over cognitive component	
JUDGING	Primary emphasis is on making decisions and coming to closure, Prefers order and structure, Like to finish one task before starting another, Plans activities entirely before commencing	
PERCEIVING	Primary emphasis is on perceiving, or gathering of information, Constantly looking for new information before making decision, Moves from one project to another, Prefers to remain flexible and avoid fixed plans, to keep options open	

51. BEST WAY TO COMMUNICATE? BUSINESS LINE _____ CELL _____ EMAIL _____

52. DO THEY USE SOCIAL MEDIA? WHICH ONES? _____

53. DO YOU HAVE A MUTUAL COLLEAGUE/FRIEND? CAN THEY INTRODUCE YOU? _____

54. COMPANY'S MISSION STATEMENT

55. WHAT ARE THIS YEAR'S 3 MOST IMPORTANT OBJECTIVIES FOR THE CLIENT?

*See Attached Run Clear Worksheet – This should be completed after Lipsey's 55 and before a Sales Presentation

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