



## **TOPIC: SALES MANAGEMENT**

### **TITLE: PROFILES**

May 18, 2000

My last newsletter talked about harnessing your networking power. One way to do that is to get to know and understand the people you work with. The stronger relationship you have with someone, the more you know them, connect with them, trust them and want to work with them. Relationships play a critical part in every interaction we have: our clients, our employees, our friendships and our families. The more successful we are in creating and managing them, the more we all benefit.

I'd like to introduce you to a powerful tool that will help you create and build better, more profitable relationships. The tool is a profile and is used to gather information on a continual basis.

A profile is a questionnaire you develop that includes questions you can ask your sources, whether clients, referral sources, prospects or employees. The primary goal is to gather more information about them so you can deepen the relationship. It's a form you keep in a file and continue to complete with every interaction you have. It also keeps information in one place, and accessible to others who may need it.

There are five key parts to a good profile:

**Business:** This section covers information regarding their company, their industry, and their competition. It is important to identify who their clients are where their business comes from, what their challenges are and what their competitive advantage is.

**Career:** In this area, you are trying to determine how they got to where they are, and what are their aspirations for their future. Where do they see their position going, what are their daily responsibilities, what is their role in overall management, and what concerns or challenges do they have?

**Goals and objectives:** What are they, how do they attempt to meet them, where do they need support?

**Individual:** What do they value, what's important to them, what do they do for fun, and what are their outside interest?

**Family:** Who are the key people in their life? Where do they vacation, who is their family, when is their birthday?

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The goal of a profile is to identify information about your client, prospect, employee, etc. in order to build a better relationship. You won't complete the tool all at once, but can keep it in their file, refer to it and expand on it with every interaction you have. The key is to ask open-ended questions, (beginning with how, what, who, etc.) or statements (tell me about...). Then, listen, listen, listen. Once your conversation or interaction is done, update the profile and keep the information current. You will never have to be memory independent - the next time you talk with this person you can automatically refer back to your last conversation and ask how their vacation was, their big meeting, etc.

Here is a worksheet to get you started on developing your own profile:

First, identify your audience. It can include clients, referral sources, friends' employees, or peers.

What questions will I ask to learn more about their business?

- 1.
- 2.
- 3.
- 4.
- 5.

What questions will I ask to learn more about their career?

- 1.
- 2.
- 3.
- 4.
- 5.

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What questions will I ask to identify their personal and individual interests?

- 1.
- 2.
- 3.
- 4.
- 5.

What questions will I ask to identify what's important to this individual:

- 1.
- 2.
- 3.
- 4.
- 5.

My challenge for you this week is to create a profile and use it to build better relationships. Your profile can focus on your clients, prospects, referral sources, employees, peers, or other relationships in your life you would like to improve. Look at the profile prior to every interaction and identify areas where you can learn more. Ask open-ended questions during your interaction and update your profile immediately after. Identify the appropriate time to follow-up with this person and mark it on your calendar.