

## Customer Profile

### General

***How did you hear about us?***

Dropdown: flyer/mail advertisement, friend or family member, newspaper, radio, returning customer, social media, TV, website, other

**Life Stage**

Dropdown: young adult, newly married, divorced, married with family, single, single parent, mid-life, career building, pre-retirement, retired

**Occupation**

Free-form typing (alpha)

**Household Income**

Dropdown: Up to \$15K, 15-19.9K, 20-24.9K, 25-29.9K, 30-34.9 K, 35-39.9K, 40-44.9K, 45-49.9K, 50-54.9K, 55-59.9, 60-64.9K, 65-69.9K, 70-74.9K, 75-79.9K, 80-84.5K, 85-89.9K, 90-94.9K, 95K+

**Relationship Status**

Dropdown: single, married, other

**Significant other's name**

Free-form typing (alpha)

**Children's Names**

Free-form typing (alpha)

**Living Arrangements**

Dropdown: rents, owns home, lives with parents, other

**Personal hobbies and interests**

Free-form typing (alpha)

***What is your preferred communication method?***

Dropdown: mobile phone, home phone, work phone, or email

***Best days and times to reach you?***

Free-form typing (alpha)

**Describe Personality/  
Communication Style**

Free-form typing (alpha) - (i.e. outgoing and friendly, likes to chat, always in a hurry, rushed, direct, get to the point, demanding)



## Financial Priorities

<i>What are your top two financial goals or priorities in the coming years?</i>	Free-form typing (alpha)
<i>What is the most important area you believe will help you achieve financial wellness?</i>	Free-form typing (alpha)
<i>How happy are you with your ability to save or your current savings?</i>	Free-form typing (alpha)
<i>How can we help you and what information do you need?</i>	Free-form typing (alpha)
List possible solutions and recommendations you can offer this customer now and in the future to achieve their priorities and financial wellness.	Free-form typing (alpha)

## Future Goals / Expenses / Dreams / Life Events

Record customer comments, cues and conversations under all that apply and jot down possible solutions and recommendations you might offer when planning future follow up calls.

<b>Changing jobs</b>	Free-form typing (alpha)
<b>Marriage</b>	Free-form typing (alpha)
<b>Starting a family</b>	Free-form typing (alpha)
<b>Education</b>	Free-form typing (alpha)
<b>Travel / Family Vacation</b>	Free-form typing (alpha)
<b>Home Purchase</b>	Free-form typing (alpha)
<b>Remodeling</b>	Free-form typing (alpha)
<b>Vacation Home</b>	Free-form typing (alpha)
<b>Starting a Business</b>	Free-form typing (alpha)
<b>Retire early / retirement planning</b>	Free-form typing (alpha)
<b>Health Challenges</b>	Free-form typing (alpha)
<b>Family death</b>	Free-form typing (alpha)
<b>Budgeting Assistance</b>	Free-form typing (alpha)
<b>Improve Credit</b>	Free-form typing (alpha)
<b>Other</b>	Free-form typing (alpha)



## Accounts and Account Preferences

***Which financial institution do you consider to be your primary account institution?***

Free-form typing (alpha)

***Which services do you use at your primary financial institution?***

Dropdown/multiple options:  
Checking, Savings, Loans, Credit Card, Mortgage, Business Services, Investments

**Enter details; rate, type of loan, accounts, etc.**

Free-form typing (alpha)

***What do you like or wish they could do better for you?***

Free-form typing (alpha)

***How do you like to do your banking?***

Dropdown: in a branch, online, on your mobile, call center, ATM

***What electronic device do you prefer to use to access your financial information?***

Dropdown: Computer, Tablet, Smart Phone, Computer and Tablet, Computer and Phone, Tablet and Phone, All of the above

**If this customer opened a checking, did the customer want to order checks at account opening?**

Choices: Yes, No

**Other comments regarding accounts and preferences**

Free-form typing (alpha)

## Business Questions

***What type of Business do you own?***

Free-form typing (alpha)

***How did you get started?***

Free-form typing (alpha)

***What do you enjoy the most about being a business owner?***

Free-form typing (alpha)

***What is the Entity?***

Dropdown: Sole Proprietor, Partnership, Corporation, LLC, Non-Profit, Organization,

***How long have you owned it?***

Free-form typing (alpha)

***What are your growth plans?***

Free-form typing (alpha)



<b><i>What is your annual revenue?</i></b>	Dropdown: Up to \$15K, 15-19.9K, 20-24.9K, 25-29.9K, 30-34.9K, 35-39.9K, 40-44.9K, 45-49.9K, 50-54.9K, 55-59.9, 60-64.9K, 65-69.9K, 70-74.9K, 75-79.9K, 80-84.5K, 85-89.9K, 90-94.9K, 95K+
<b><i>With which financial institution do you have your Business Account?</i></b>	Free-form typing (alpha)
<b><i>Which business services do you use at your primary financial institution?</i></b>	Check all that apply: Checking, Savings, Loans, Credit Card, Business Services, Investments
<b><i>Enter details; rate, type of loan, accounts, etc.</i></b>	Free-form typing (alpha)
<b><i>What do you like or wish they could do better for you?</i></b>	Free-form typing (alpha)
<b><i>How many employees do you have?</i></b>	Dropdown: Under to 15, 15-29, 30-50, 50-75, 100+
<b><i>Do you offer Merchant Services? If so, who do you use for this service?</i></b>	Choices: Yes, No Free-form typing (alpha)
<b><i>What are your top priorities, goals and opportunities in the coming year?</i></b>	Free-form typing (alpha)
<b><i>Where do you want to be in 3-5 years?</i></b>	Free-form typing (alpha)
<b><i>What are some key challenges or problems facing your business?</i></b>	Free-form typing (alpha)
<b><i>What are current and future trends in your industry?</i></b>	Free-form typing (alpha)
<b><i>Who are your key competitors and what is your competitive position with your peer group?</i></b>	Free-form typing (alpha)
<b><i>Who do you currently bank with and how happy are you with them?</i></b>	Free-form typing (alpha)
<b><i>As a financial partner, if we could do anything that would help you, your business or employees, what would that be?</i></b>	Free-form typing (alpha)



## Business Profile

<b>Industry</b>	Free-form typing (alpha)
<b>Professional Industry Association</b>	Free-form typing (alpha)
<b>Key Decision Makers</b>	Free-form typing (alpha)
<b>Executives/Partners</b>	Free-form typing (alpha)
<b>External Advisors/CPA/Influencers</b>	Free-form typing (alpha)
<b>Annual Sales/Revenue</b>	Free-form typing (alpha)
<b>Number of Locations</b>	Free-form typing (alpha)
<b>Describe Revenue Potential/Opportunities</b>	Free-form typing (alpha)
<b>Describe the business, their products/services, who are their customers?</b>	Free-form typing (alpha)
<b>Current Loans/Accounts with us or other providers</b>	Free-form typing (alpha)
<b>Client-perceived strengths and weaknesses of our credit union</b>	Free-form typing (alpha)
<b>List potential opportunities to develop a full relationship and connect this client with other business lines or partners</b>	Free-form typing (alpha)

***If you need help implementing your relationship process and training staff to engage in deeper conversations, give us a call at (858) 674-5500, ext 101.***

*High Definition Banking® is a training and consulting firm that partners with progressive banks and credit unions committed to enhancing the financial well-being of their customers or members. We implement structured processes to move beyond the 1980's transactional product-selling model to a relationship-building and advice-focused model. The result is a highly differentiated experience resulting in organic growth from loyal advocates and best of all—highly engaged staff inspired to make a difference! Learn more at [www.HighDefinitionBanking.com](http://www.HighDefinitionBanking.com)*