

Member Profile

General

How did you hear about us?

Dropdown: flyer/mail advertisement, friend or family member, newspaper, radio, returning member, 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 member now and in the future to achieve their priorities and financial wellness.	Free-form typing (alpha)

Future Goals / Expenses / Dreams / Life Events

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

Changing jobs	Free-form typing (alpha)
Marriage	Free-form typing (alpha)
Starting a family	Free-form typing (alpha)
Education	Free-form typing (alpha)
Travel / Family Vacation	Free-form typing (alpha)
Home Purchase	Free-form typing (alpha)
Remodeling	Free-form typing (alpha)
Vacation Home	Free-form typing (alpha)
Starting a Business	Free-form typing (alpha)
Retire early / retirement planning	Free-form typing (alpha)
Health Challenges	Free-form typing (alpha)
Family death	Free-form typing (alpha)
Budgeting Assistance	Free-form typing (alpha)
Improve Credit	Free-form typing (alpha)
Other	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 member opened a checking, did the member 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)



<i>What is your annual revenue?</i>	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+
<i>With which financial institution do you have your Business Account?</i>	Free-form typing (alpha)
<i>Which business services do you use at your primary financial institution?</i>	Check all that apply: Checking, Savings, Loans, Credit Card, Business Services, Investments
<i>Enter details; rate, type of loan, accounts, etc.</i>	Free-form typing (alpha)
<i>What do you like or wish they could do better for you?</i>	Free-form typing (alpha)
<i>How many employees do you have?</i>	Dropdown: Under to 15, 15-29, 30-50, 50-75, 100+
<i>Do you offer Merchant Services? If so, who do you use for this service?</i>	Choices: Yes, No Free-form typing (alpha)
<i>What are your top priorities, goals and opportunities in the coming year?</i>	Free-form typing (alpha)
<i>Where do you want to be in 3-5 years?</i>	Free-form typing (alpha)
<i>What are some key challenges or problems facing your business?</i>	Free-form typing (alpha)
<i>What are current and future trends in your industry?</i>	Free-form typing (alpha)
<i>Who are your key competitors and what is your competitive position with your peer group?</i>	Free-form typing (alpha)
<i>Who do you currently bank with and how happy are you with them?</i>	Free-form typing (alpha)
<i>As a financial partner, if we could do anything that would help you, your business or employees, what would that be?</i>	Free-form typing (alpha)



Business Profile

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