



THE CUSTOMER IN PROCESS ANALYSIS SYSTEM

COMMUNITY: _____ REP: _____ DATE: _____ REPORT# _____

CUSTOMER(S) NAME (Full Individual Names): _____

PERSONALITY TYPE:

RANKING:

(Check dominant as 1, subdominant as 2)

(Circle)

___D___I___S___C
(Dr) (Ex) (Am) (An)

A or A1
B or B1

___D___I___S___C
(Dr) (Ex) (Am) (An)

C or C1

(Attach Customer Registration Card)

Are they registered by a Realtor? Y or N If yes, who? _____ (Attach Registration)

Date of 1st visit: _____ # Contacts since 1st visit: In person _____ By phone _____ By mail/fax/e-mail _____ Total: _____

Date of last contact: _____ Contact method and what transpired: _____

CUSTOMER PROFILE: (general info such as: married, single, children, work, hobbies, interests, type of car, age range, etc):

1. What do I have in common with them? _____
2. How long have they been looking at new homes? _____ How do they like "looking"? _____
3. What type of homes are they considering? _____
4. Are there any particular needs? _____
5. Where else have they looked? _____
6. What did they like about those? _____
7. What about those that didn't quite fit their needs? _____
8. Will they be selling their present home before they acquire a new one? Y or N Is it currently on the market? Y _____ or N _____
9. If yes to #8, is it listed with a broker? Y or N If yes, who? _____
10. Are they financially qualified? Explain. _____
11. How did they hear about (NAME OF COMPANY)? Ad _____ Sign/Billboard _____ Friend/Relative _____ Realtor _____
Drive-By _____ Internet _____ Other _____
12. What was it in that source that attracted their attention? _____
13. How did you reinforce or use this information in your presentation? _____
When they find the home that they like, when do they think they will be moving in? _____
14. When they find the home that they like, when do they think they will be moving in? _____
15. a. What are their Hot Buttons (why do you think they are interested in our homes)? _____
Ego/Status Lifestyle _____ Location _____ Larger/Smaller _____ New/Newer _____ Fin. Opp. _____ Other: _____
Explain: _____
15. b. What did you do, or can we do, to reinforce their Hot Buttons? _____
16. a. What are their Hidden Fears (worry list)? Financial Obligation _____ Business with A Builder _____ Financial Process _____
The Unknown _____ The Move Itself _____ Final Commitment _____ Other: _____
Explain: _____
16. b. What did you do, or can we do, to alleviate their Hidden Fears? _____

WHY HAVE THEY NOT YET PURCHASED? _____

HYPOTHETICALLY, IF WE DO NOTHING FURTHER, WHAT DO YOU THINK WILL OCCUR? _____

WHAT IS MY ACTION PLAN? (Set forth specific action to be taken with time frames indicated) _____

RESULTS: _____