CLIENT CONNECTION LIST

Individual

1. Favorite hobbies – what are they passionate about?
2. Favorite magazine/periodical
3. Favorite movie
4. Leisure activities – weekend, vacation, etc.
5. Favorite sports team
6. Favorite participant sport
7. Type of car owned/most liked – might be different
8. Pet owner?
9. Most recent book read
10. Favorite place to eat
11. Favorite food
12. Status symbols in office – take note of and talk about awards, trophies, etc.
13. Most recent seminar attended
14. Most recent vacation – where? Where will the next vacation be?
15. Taking classes – personal development, etc.

Personal

16. Hometown
17. Date of birth
18. Current residence
19. Marital status and name of partner
20. Personal goals
21. Awards won
22. Dislikes
23. Views on topical matters
24. How did they get started in business?
25. How did they get started in their career?
26. College/university/other school(s) attended
27. Member of a country club?
28. Previous places lived in
29. Previous places worked in
30. Belief or faith

© 2010 Buffini & Company. All rights reserved.

CLIENT CONNECTION LIST

Family

31. How many children? (Who is in school? Studying what?)
32. Their activities/sports
33. Their achievements

Business

34. Most significant challenges
35. Largest competitor
36. Involved in which trade associations
37. Subscribe to/read what trade publications
38. Involved in what civic/community organizations
39. Past experiences they've had dealing with your type of service

© 2010 Buffini & Company. All rights reserved.