Introduction

Many of today's CRM solutions are quite capable of maintaining customer contact information, transaction history, conversations, and so on—a capability that allows us to provide solid customer service. These core competencies are expected, and when we perform them well, we are meeting expectations. The goal, however, is to use our CRM solution to exceed customer expectations and to connect with them on a personal level.

The more personal details that you can capture through ongoing conversations and customer calls or visits, the more opportunities you'll uncover to add value. To get an inside view of your clients, here are some key data categories that should be part of every customer profile.

credit: http://www.destinationcrm.com/Articles/Columns-Departments/The-Tipping-Point/6-Data-Categories-Your-CRM-System-Should-Be-Capturing-113303.aspx

Customer contact information

This is the basic information that most companies or organizations store and use in their CRM systems—fields like Company, Name, Address and Phone, etc. In this category, you can enhance customer records with additional fields such as Nickname, Birthday, and Hometown.

Business history

Knowing a customer's professional background can be invaluable for gaining insight. Fields such as Previous Employer, Titles and Positions Held, and Professional or Trade Associations, among others, should be included.

Education and training

Most company databases don't have any information related to their clients' education or advanced training. Fields such as High School, College, College Honors, Degrees, Fraternity/Sorority, Sports, and Military Service with Discharge Rank could all prove useful. You could also capture any training programs that they have participated in to enhance their education.

Lifestyle information

This one goes hand in hand with the special-interest category, and it can likewise be very useful. Fields like Hobbies and Recreations, Vacation Spots, Favorite Sports and Teams, Cars, Favorite Restaurants and Bars, and Favorite Foods can all be included, as can lifestyle choices such as whether they smoke or drink. I enjoy cigars, and when I find a client who enjoys them, it is easy to schedule a meeting at a local cigar bar. (Make sure you read the warning label.)

Family

Special interests

Here's another of my favorite categories, as it also allows you to forge a real connection. I always ask this question as I'm leaving clients on the first visit: "When you are not working 60 hours a week, what do you do for fun?" Their response will give you clues as to where you can deliver additional value. Fields like Professional Associations, Service Clubs, Religion, and Political Affiliations are all useful information. I have in-depth conversations with clients regardless of their views or affiliations. I don't judge them; I just listen and try to gain understanding. If I'm discussing politics with a client, I'll ask questions like "Did you see the debate last night?" and "What were your thoughts?" You can talk about any subject without offering agreement by responding with "That's an interesting perspective.".

Conclusion

The amount of customer detail you need varies by industry; a bank or gym, for example, doesn't need to capture all these specifics. But a lawyer, an accountant, an insurance agent, a realtor, or anyone who calls on customers would gain a significant edge on the competition by recording these kinds of details.

This category has provided a wealth of information and insight for me over the years, allowing me to connect with customers on a very personal level. On every call, I'm able to ask how their partner is or what their children are up to, and I can use their names when I do. Relevant fields could include Spouse's Name and Occupation, Spouse's Education and Interests, Anniversaries and Birthdays (and other important dates), Children's Names and Ages, Grandchildren's Names and Ages, and so forth. People love to talk about their children and especially their grandchildren, so get specific (activities, achievements, etc.)..