

Express-analysis of a client by phone

Date of phone call ____/____/____

Location _____

Company name _____

First and Last name _____

Contact info _____

Characteristics of a client

_____ **Level of decision-making** _____

- | | | |
|--|---------------------------------|--------------------------------------|
| <input type="checkbox"/> Decision maker | <input type="checkbox"/> Expert | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Decision influencer | <input type="checkbox"/> User | |

_____ **Manner of communication** _____

Behavior in communication:

- | | | |
|-------------------------------------|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Restrained | <input type="checkbox"/> Confident | <input type="checkbox"/> Uninhibited |
| <input type="checkbox"/> Restless | <input type="checkbox"/> Uncertain | <input type="checkbox"/> Shy |

Tone of communication:

- | | | |
|---------------------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> Domineering | <input type="checkbox"/> Calm | <input type="checkbox"/> Irritated |
| <input type="checkbox"/> Ingratiating | <input type="checkbox"/> Excited | <input type="checkbox"/> _____ |

Mood in communication:

- | | | |
|----------------------------------|-----------------------------------|------------------------------------|
| <input type="checkbox"/> Serious | <input type="checkbox"/> Friendly | <input type="checkbox"/> Militant |
| <input type="checkbox"/> Playful | <input type="checkbox"/> Enraged | <input type="checkbox"/> Depressed |

_____ **Style of communication** _____

- | | | |
|-------------------------------------|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Creative | <input type="checkbox"/> Aggressive | <input type="checkbox"/> Demanding |
| <input type="checkbox"/> Purposeful | <input type="checkbox"/> Compliant | <input type="checkbox"/> Business |
| <input type="checkbox"/> Friendly | <input type="checkbox"/> Populist | <input type="checkbox"/> Formal |
| <input type="checkbox"/> Abandoned | <input type="checkbox"/> Flirting | <input type="checkbox"/> Process |

Express-analysis of a client by phone

Features of speech

Rate of speech

Fast

Normal

Slow

Frequently used words and phrases _____

Temperament

Features of personality:

Vigorous

Non-Initiative

Impatient

Slow

Emotional

Confident

Inert

Balanced

Insecure

Communicative

Attentive

Cheerful

Purposeful

Inattentive

Sluggish, tired

Passive

Explosive

Vulnerable

Tends to changes

Spitfire

Agitated

Tend to constancy

Calm

Plodding

Creative

Patient

Indifferent

Type of temperament (conclusion):

Sanguine

Melancholic

Choleric

Phlegmatic

Communication style

The nature of the information perception

Visual

Kinesthetic

Auditory

Digital

Read an article: <https://sergeybure.com/blog/how-to-speak-to-clients-on-the-phone>