

TOOL 2.3.10: Additional details form | Exploratory meeting business information pack

PURPOSE: Data collection to be used by personal client manager in exploratory meeting to gather additional personal information from the potential client. To be used in conjunction with the personal details form completed in initial telephone enquiry. This can be captured in your electronic CRM system/software.

**Client facing or business internal only tool. To be cut below the dotted line and embodied into personalised branded document*



ADDITIONAL PERSONAL DETAILS FORM

Name: date of birth:

Partner: date of birth:

Child's name: date of birth:

Child's name: date of birth:

Child's name: date of birth:

Child's name: date of birth:

Parent's name: date of birth:

Parent's name: date of birth:

Parent's name: date of birth:

Parent's name: date of birth:

Pet name and type:

Pet name and type:

EXPLORE

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OTHER INFORMATION

Preferred mode of contact: Email or Post

Preferred refreshments:

What they enjoy outside of work i.e. activities/ entertainment/ recreation / hobbies:

Other: