Customer Personality Assessment Worksheet Template

Customer Details

- Customer Name: [Enter Customer Name]
- Personality Type: [Enter Personality Type] (e.g., Dominant, Talkative, Analytical, Silent, Skeptical)

Personality Insights

- Key Characteristics:
- [List Key Characteristic 1]
- [List Key Characteristic 2]
- [List Key Characteristic 3]
- [List Key Characteristic 4]

Engagement Strategies

- Tips for Engaging:
- [Provide Tip 1 for Engaging]
- [Provide Tip 2 for Engaging]
- [Provide Tip 3 for Engaging]
- [Provide Tip 4 for Engaging]

Customer-Specific Notes

Customer Details	Information
Customer Name	[Enter Customer Name]
Personality Type	[Enter Personality Type] (e.g., Dominant, Talkative, Analytical, Silent, Skeptical)
Personality Insights	Key Characteristics
Characteristic 1	[List Key Characteristic 1]
Characteristic 2	[List Key Characteristic 2]
Characteristic 3	[List Key Characteristic 3]
Characteristic 4	[List Key Characteristic 4]
Engagement Strategies	Tips for Engaging
Tip 1	[Provide Tip 1 for Engaging]
Tip 2	[Provide Tip 2 for Engaging]
Tip 3	[Provide Tip 3 for Engaging]
Tip 4	[Provide Tip 4 for Engaging]
Customer-Specific Notes	[Enter Notes on Specific Customer]

- [Enter Notes on Specific Customer]