

## CURRENT

## NEW

## VALUE



- Option
- Option
- Other: \_\_\_\_\_

- Option
- Option

### Carrier

Opportunity to help  
 \_\_\_\_\_  
 Opportunity to help  
 \_\_\_\_\_  
 Opportunity to help  
 \_\_\_\_\_

### Trade-In Value

Trade-In	Value
Trade-In	Value
Trade-In	Value
Trade-In	Value
Trade-In	Value

Total Trade-In Value: \_\_\_\_\_

Military | First Responder | 55+  Y  N    Frequent Flyer  Y  N

### Current Plan

### New Plan

### Streaming Services

### Streaming Services

- Option
- Option
- Option
- Option
- Option
- Other: \_\_\_\_\_

Included  
 \_\_\_\_\_  
 Included  
 \_\_\_\_\_  
 Included  
 \_\_\_\_\_  
 Included  
 \_\_\_\_\_  
 Included  
 \_\_\_\_\_

Monthly Costs \_\_\_\_\_

Monthly Savings \_\_\_\_\_

### + Promotional Offer Value

Promotion	Value
Promotion	Value
Promotion	Value
Promotion	Value
Promotion	Value
Promotion	Value

Total Promotional Value: \_\_\_\_\_

### + Benefits

Promotion	Value
Promotion	Value
Promotion	Value

Total Benefit Value: \_\_\_\_\_

### Benefits

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

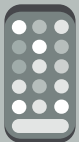
### = Value Created

### Total Savings

Monthly Savings	Annual Savings	3-Year Savings
_____	_____	_____
Helped with _____		
Helped with _____		
Helped with _____		



Plan



Devices

	Device	Monthly \$		Device	Monthly \$
1:	Name Device Model	Plan   Device Payment	1:	Name Device Model	Plan   Device Payment
2:	Name Device Model	Plan   Device Payment	2:	Name Device Model	Plan   Device Payment
3:	Name Device Model	Plan   Device Payment	3:	Name Device Model	Plan   Device Payment
4:	Name Device Model	Plan   Device Payment	4:	Name Device Model	Plan   Device Payment
5:	Name Device Model	Plan   Device Payment	5:	Name Device Model	Plan   Device Payment
6:	Name Device Model	Plan   Device Payment	6:	Name Device Model	Plan   Device Payment



Protection

<input type="radio"/> Carrier Protection	Qty   Cost	<input type="radio"/> Carrier Protection	Qty   Cost
<input type="radio"/> Other Protection	Qty   Cost	<input type="radio"/> Other Protection	Qty   Cost
		Protected from	Protected from



Accessories

<input type="radio"/> Screen Protector	Qty   Cost	<input type="radio"/> Screen Protector	Qty   Cost
<input type="radio"/> Case	Qty   Cost	<input type="radio"/> Case	Qty   Cost
<input type="radio"/> Wireless Charger	Qty   Cost	<input type="radio"/> Wireless Charger	Qty   Cost
		<input type="radio"/> Best Bundle	Qty   Cost



Due Monthly

Current	New
_____	_____



Due Today

_____
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# Qualifier Assessment

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Carrier 1 Exclusive

Carrier 2 Exclusive

Carrier 3 Exclusive

Thank you for the opportunity to help with your wireless needs!  
**To get started, please answer the questions below while you wait.**

**1. What items can we help you check off of your list today?**

(Write in answers below or select all that apply)

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

- Help finding the best deal
- Help with account or lowering the bill
- Help with upgrade(s) or adding line(s)
- Help getting better coverage
- Help with a couple questions

**2. What Carrier do you currently use for phone service?**

Carrier 1 | Carrier 2 | Carrier 3 | Other: \_\_\_\_\_

Rate your overall experience:

(Circle the applicable rating - 1 being absolutely terrible to 10 being absolutely amazing)

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10

(Coverage, Affordability, Customer Care, etc.)

Notes on rating:

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**4. How many of the following line types are active on your account?**

Phone: \_\_\_\_\_ Tablet: \_\_\_\_\_ Smartwatch: \_\_\_\_\_ Hotspot Lines: \_\_\_\_\_

**5. Which phones do you have on your account?**

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_  
6. \_\_\_\_\_

**6. What would you do with your old phone if you got a new one?**

Trade-In | Give Away | No Plans  
Trade-In | Give Away | No Plans  
Trade-In | Give Away | No Plans  
Trade-In | Give Away | No Plans  
Trade-In | Give Away | No Plans  
Trade-In | Give Away | No Plans

**7. Which lines are ready for an upgrade?**

Ready! | Not Yet | Depends...  
Ready! | Not Yet | Depends...  
Ready! | Not Yet | Depends...  
Ready! | Not Yet | Depends...  
Ready! | Not Yet | Depends...  
Ready! | Not Yet | Depends...

**8. How do you currently protect your phone(s)?**

Protection Plan: Carrier Protection | Option | Option | None | Other \_\_\_\_\_

Accessories: Case(s) | Screen Protectors | None | Other \_\_\_\_\_

**9. How much is your monthly bill?** \_\_\_\_\_

**10. What streaming services do you use?** Other(s): \_\_\_\_\_

Option | Option | Option | Option | Option | Option | Option | Option | Other \_\_\_\_\_

**CURRENT**

**NEW**

**VALUE**



- Option
- Option
- Other: \_\_\_\_\_

**Carrier**  
 Looking to upgrade  
 Add kids  
 Add grandma to help out

Military | First Responder | 55+

Frequent Flyer

**Current Plan**

**New and Improved Plan**

**Streaming Services**

**Streaming Services**

- Option
- Option
- Option
- Option
- Option Other: Service

- Service 1 - \$7.99/mo
- Service 2 - \$7.99/mo
- Service 3 - \$9.99/mo
- Service 4 - \$10.99/mo
- Service 5 - \$4.99/mo

Monthly Costs **\$51.94/mo**

Monthly Savings **\$41.95/mo**



Devices

Device	Monthly \$
1: John Phone Type	\$70 \$0
2: Cathy Phone Type	\$50 \$0
3: _____	_____
4: _____	_____
5: _____	_____
6: _____	_____

Device	Monthly \$
1: John Phone Type	\$90 <del>\$33.34</del> \$9.44
2: Cathy Phone Type	\$70 <del>\$22.27</del> \$0
3: Matt Phone Type	\$35 <del>\$19.45</del> \$5
4: Jackie Phone Type	\$25 <del>\$19.45</del> \$5
5: Grandma Phone Type	\$30 \$0
6: _____	_____

**Trade-In Value**

Trade-In	Johns Phone for \$800
Trade-In	Cathys Phone for \$800
Trade-In	_____
Trade-In	_____

Total Trade-In Value: **\$1,600**

**+ Promotional Offer Value**

Over XX months	Value
Promotion Phone -	\$519.99
Promotion Phone -	\$519.99
Promotion Phone -	\$500.00
Promotion	_____
Promotion	_____

Total Promotional Value: **\$1,539.98**

**+ Benefits**

Promotion Phone -	\$35
Promotion Phone -	\$35
Promotion Phone -	\$60
Total Benefit Value: <b>\$130</b>	

**Benefits**

- Multiple carrier options
- Best bundles
- Protection plan options
- Benefits & National offers

Protection

- Carrier Protection 2/\$34/mo
- Other Protection \_\_\_\_\_

- Carrier Protection 4/\$68/mo
  - Other Protection \_\_\_\_\_
- Accidental loss | Active lifestyle

Accessories

- Screen Protector
- Case
- Wireless Charger

- Screen Protector 1/\$24.99
- Case \_\_\_\_\_
- Wireless Charger \_\_\_\_\_
- Best Bundle 4/\$264.90

**= Value Created**

Promo & Trade Savings - \$3,139.98  
 Additional Savings - \$130  
**Total Savings: \$3,269.98**  
 Streaming Service Savings  
 \$41.95/mo | \$503.40 | \$1,510.20  
 Upgraded both your phones  
 Added kids and grandma  
 Got you upgraded to a premium plan

**\$**  
Due Monthly

Carrier - \$154/mo + Tax  
 Per Line - \$77/mo  
 Streaming - \$51.94/m

Carrier - \$337.44/mo + Tax  
 Per Line - \$67.49/mo  
 With AP  
 Next bill will include fees  
 Streaming - \$9.99/mo

**\$**  
Due Today

Accessories - \$264.9  
 Sales Tax - \$205.5 (at 6%)  
**Total: \$470.4**