

Logo
Here

Company Name

Slogan Here...

Title Here...

Name: _____

Date: _____

Step 1: Step and time expectations...

Step 2: Step and time expectations...

Step 3: Step and time expectations...

Who and how to benefit?

1.

2.

3.

What would you like avoid?

1.

2.

3.

Married: Y / N

Durable POA:

Health POA:

Business Owner: Y / N

Veteran: Y / N

Notes

Questions

Quote: \$ _____

This quote is not guaranteed and is subject to change for any reason.

CURRENT

NEW

VALUE



☐ Option
☐ Option
☐ Other: _____

☐ Option
☐ Option

Carrier

Opportunity to help

Opportunity to help

Opportunity to help

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

Current Plan

New Plan

Streaming Services

Streaming Services

☐ Option
☐ Option
☐ Option
☐ Option
☐ Option

☐ Option
☐ Option
☐ Other: _____

Included

Included

Included

Included

Included

Monthly Costs _____

Monthly Savings _____

Trade-In Value

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

Total Trade-In Value: _____

+ 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: _____

Benfits

☐ _____

☐ _____

☐ _____

☐ _____

= Value Created

Total Savings

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



Devices

	Device	Monthly \$
	Name	
1:	Device Model	<div>Plan</div> <div>Device Payment</div>
2:	Device Model	<div>Plan</div> <div>Device Payment</div>
3:	Device Model	<div>Plan</div> <div>Device Payment</div>
4:	Device Model	<div>Plan</div> <div>Device Payment</div>
5:	Device Model	<div>Plan</div> <div>Device Payment</div>
6:	Device Model	<div>Plan</div> <div>Device Payment</div>

	Device	Monthly \$
	Name	
1:	Device Model	<div>Plan</div> <div>Device Payment</div>
2:	Device Model	<div>Plan</div> <div>Device Payment</div>
3:	Device Model	<div>Plan</div> <div>Device Payment</div>
4:	Device Model	<div>Plan</div> <div>Device Payment</div>
5:	Device Model	<div>Plan</div> <div>Device Payment</div>
6:	Device Model	<div>Plan</div> <div>Device Payment</div>

☐ Carrier Protection Qty | Cost

☐ Other Protection Qty | Cost

☐ Carrier Protection Qty | Cost

☐ Other Protection Qty | Cost

Protected from Protected from

☐ Screen Protector

☐ Case

☐ Wireless Charger

☐ Screen Protector Qty | Cost

☐ Case Qty | Cost

☐ Wireless Charger Qty | Cost

☐ Best Bundle Qty | Cost

Current

New



Due Monthly

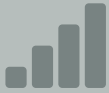


Due Today

CURRENT

NEW

VALUE



Carrier

- ☒ Option
☐ Option
☐ Other: _____

Carrier
 Looking to upgrade
 Add kids
 Add grandma to help out

Military | First Responder | 55+

Y ☒ Frequent Flyer Y ☒

Current Plan

New and Improved Plan

Streaming Services

Streaming Services

- ☒ Option
☒ Option
☒ Option
☐ Option
☒ Option Option | Option

Monthly Costs \$51.94/mo

- 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 Savings \$41.95/mo

	Device	Monthly \$
1:	John Phone Type	\$70 \$0
2:	Cathy Phone Type	\$50 \$0
3:	Name Device Model	Plan Device Payment
4:	Name Device Model	Plan Device Payment
5:	Name Device Model	Plan Device Payment
6:	Name Device Model	Plan Device Payment

	Device	Monthly \$
1:	John Phone Type	\$90 \$33.34 \$9.44
2:	Cathy Phone Type	\$70 \$22.22 \$0
3:	Matt Phone Type	\$35 \$19.45 \$5
4:	Jackie Phone Type	\$25 \$19.45 \$5
5:	Grandma Phone Type	\$30 \$0
6:	Name Device Model	Plan Device Payment

- ☒ Carrier Protection 2/\$34/mo
☐ Other Protection

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

- ☐ Screen Protector
☒ Case
☐ Wireless Charger

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

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

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	
Promotion	Phone - \$519.99
Promotion	Phone - \$519.99
Promotion	Phone - \$500.00
Promotion	
Promotion	

Total Promotional Value: \$1,539.98

+ Benefits

Promotion	Phone - \$35	Value
Promotion	Phone - \$35	Value
Promotion	Phone - \$60	Value
Total Benefit Value:	\$130	

Benefits

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

= 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



Due Today

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

To get started, please answer the questions below while you wait.

(Write in answers below or select all that apply)

- ☐ 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

Carrier 1 | Carrier 2 | Carrier 3 | Other:

(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.)

Phone: Tablet: Smartwatch: Hotspot Lines:

7. Which lines are ready for an upgrade?

Ready! | Not Yet | Depends...

Protection Plan:	Carrier Protection	Option	Option	None	Other
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Accessories: Case(s) | Screen Protectors | None | Other

9. How much is your monthly bill?

Other(s):

Option | Option | Option | Option | Option | Option | Option | Option | Other