Customer Name: _____ MTN: _____

Carrier: verizon AT&T Sprint OTHER

## ACCOUNT

# Lines: _____

Current Bill: _____

Needs/ Concerns: _____

Employee Discount: _____

## DEVICES

Current Device: _____

Likes/ Dislikes: _____

Shopped Devices: _____

## PREFERENCES

Screen Size: Less Same More

Battery Life: Good Need More

Storage: Good Need More

Camera: Good Need Better

Durability: Kids Work Me

## LIFESTYLE

Video/ Hotspot: _____

Music: _____

Car (Bluetooth/ wifi): _____

Travel/ Work: _____

Additional Users: _____

Mobile Devices: _____

Connectivity: _____

| Current Plan | New Plan |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | HUM |
| | Tablet |
| | Mifi |
| | Watch |
| Disc | |
| **Total** | |

**FIRST BILL:** _____

**TODAY:** _____

NOTES:

_____

_____

_____

_____

_____

_____