

Annual Bill Negotiation Worksheet

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BEFORE THE CALL

Know the current deal, the alternative, and the number that makes staying worthwhile.

BILL / PROVIDER

Internet, mobile, insurance, membership, etc.

ACCOUNT / POLICY REFERENCE

Last 4 digits only if you prefer

CURRENT RECURRING COST

\$ per month or \$ per year

RENEWAL / PROMO END DATE

Write the actual date if known

WHAT I AM PAYING FOR

Plan, speed, coverage, features, equipment

WHAT I MUST KEEP

The features I am not willing to lose

ONE REAL ALTERNATIVE

COMPETITOR / ALTERNATIVE OFFER

Price, post-promo price, equipment, contract, bundle requirements

TARGET PRICE

The number that makes staying easy

WALK-AWAY NUMBER

The point where I seriously compare switching

MY ASK

ONE SENTENCE I WILL USE

"I would prefer to stay if you can get my recurring total closer to ___ without changing ____."

BEFORE I SAY YES, I WILL VERIFY:

- | | |
|--|---|
| ☐ New recurring total | ☐ How long the price lasts |
| ☐ Post-promo / renewal price | ☐ Equipment or add-on changes |
| ☐ Contract / cancellation terms | ☐ Any discount that disappears |

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DURING THE CALL

DATE / TIME

REPRESENTATIVE / DEPARTMENT

OFFER 1

Price, duration, service changes, fees, contract terms

OFFER 2 / RETENTION OPTION

Write "none" if there is no second offer

THE DEAL I ACCEPTED

NEW RECURRING COST

PRICE VALID UNTIL

WHAT CHANGED

Speed, coverage, equipment, add-on, payment method

CONFIRMATION NUMBER / PROOF

SAVINGS CHECK

OLD RECURRING COST

NEW RECURRING COST

MONTHLY SAVINGS

Old - new

ANNUALIZED SAVINGS

Monthly savings x 12

NEXT REVIEW DATE

Put it in your phone/calendar now.

NOTES FOR NEXT YEAR

What worked, what was annoying, what I would compare first next time