



U. S. E. C.

Energy Insights, Analysis, Savings, Delivered.

Initial Customer Interview

Business Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: office: \_\_\_\_\_

cell: \_\_\_\_\_

LOA Signed  Bill Copy Received

Current Supplier: \_\_\_\_\_

**Product Desired:** \_\_\_\_\_

- \_\_\_\_\_ Fixed All-in
- \_\_\_\_\_ Energy Only
- \_\_\_\_\_ Index
- \_\_\_\_\_ Block & Index
- \_\_\_\_\_ On & Off Peak
- \_\_\_\_\_ Heat
- \_\_\_\_\_ Other (Specify in Notes)

Estimated Annual kWh: \_\_\_\_\_

Current Product: \_\_\_\_\_

Current Rate: \_\_\_\_\_

CED (Contract End Date): \_\_\_\_\_

**Preferred Term:** 12 24 36 48 60 (other: \_\_\_\_\_)

Hours of Operations: \_\_\_\_\_

**Preferred Supplier:** \_\_\_\_\_

Last Time you made a decision on your energy, what was the deciding factor? \_\_\_\_\_

Are you currently working with a Broker? (circle one) YES / NO. If YES, Broker Shop Name: \_\_\_\_\_

What are some things you Like or Dislike about that Broker? \_\_\_\_\_

When shopping for a Supplier to work with, what are some things that are important to you? \_\_\_\_\_

When working with an Energy Broker, what are your expectations of them? \_\_\_\_\_

Notes: \_\_\_\_\_

Follow Up Date: \_\_\_\_\_

**Our Mission Statement:**

“To provide value, options, and control to all customers no matter big or small, with the best combination of Price and Term in the industry.”

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