Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Clinics Intake Packet

Everything we need to build your new-patient front door, recare and reactivation, unscheduled-treatment follow-up and your Monday practice report, with BAA coverage confirmed for each channel before launch. Snap Credit Fix, a California credit repair company, runs on a system I built for them.

How to use this packet: fill in what you can, skip what you don't know, and we'll finish the rest together on the intake call. Type directly into the fields (works in Adobe Reader, Preview, Chrome, and most phones) or print and hand-write.

Sections 1-8 tell us who you are and how you work today. Section 9 is the monthly time audit – where your hours actually go. Section 11 shows the three packages and add-ons. Section 12 is a menu of what we can take off your plate; tick everything that sounds useful and write down your top three.

Nothing here commits you to anything. It becomes your one-page Client Brief and a fixed quote within two business days. **Return this packet through a secure upload link, not by email.**

COMPANY

YOUR NAME

DATE

EVERBORN CONTACT

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1. Company Basics

Legal company name (exactly as on your W-9)

DBA / brand name

Main phone

Main email

Website

Office address (city, state, zip)

Practice legal name

DBA / practice name

Specialty

Owner / lead provider

Providers (#) and license numbers

Office manager

Treatment coordinator

Address(es) (city, state, zip)

Operatories / treatment rooms (#)

Active patient count (last 18 months) and total chart base

Payer mix (PPO, fee-for-service, cash, Medicare)

Company type

- ☐ General dental
- ☐ Specialty dental (ortho, perio, oral surgery, endo, pediatric)
- ☐ Med spa / aesthetics
- ☐ Chiropractic
- ☐ Physical therapy
- ☐ Dermatology (medical and / or cosmetic)
- ☐ Multi-location / DSO-affiliated

Other:

Products / services you actively sell

- ☐ Hygiene / recare
- ☐ Restorative
- ☐ Implants
- ☐ Clear aligners / ortho
- ☐ Cosmetic dentistry
- ☐ Neurotoxin / fillers
- ☐ Body contouring / lasers
- ☐ Chiropractic care
- ☐ Physical therapy plans of care
- ☐ Full-body skin exams
- ☐ Cosmetic dermatology
- ☐ In-house membership plans
- ☐ Packages / series

Other:

New patients per month

Average production per visit

Average days from first call to first visit

12-month new-patient / production goal

In one or two sentences, who is your ideal patient, and why do they choose your practice over the one down the street?

2. Your Team

Everyone who touches a lead, a customer, or a partner. We use this to set up users, round-robin, calendars, and the Monday report.

NAME	ROLE (Owner / doctor / Associate provider / Hygienist / Injector / therapist / Office manager / Treatment coordinator / Front desk / scheduler)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐
					☐
					☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

How are new leads assigned today?

- ☐ Whoever answers the phone
- ☐ Front desk works every inquiry
- ☐ Treatment coordinator takes consult inquiries
- ☐ By location
- ☐ By provider
- ☐ Answering service / call center

Other:

What is the one thing about how the team works that you would NOT want an automated system to change?

3. Brand & Voice

So every text, email, page, and printout sounds and looks like you from day one.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

- ☐ Logo (PNG/SVG, light + dark)
- ☐ Provider headshots and bios
- ☐ Office photos / video
- ☐ Signed testimonial and before/after consents
- ☐ Existing email signature
- ☐ Patient education materials
- ☐ Current new-patient offers (for review)

Other:

Google Business Profile link

Review links (Google Business Profile / Yelp / Healthgrades / Zocdoc / RealSelf (med spa) / Facebook)

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

- ☐ Warm & plain-spoken
- ☐ Professional
- ☐ High-energy
- ☐ Educational / advisor
- ☐ Bilingual (specify)

Other:

Required disclosure line(s) for all marketing (e.g. '[Provider Name], DDS · License #XXXXX · [Practice Name]') – paste it exactly

Paste your exact line; some states require the licensee's name in every ad, and Texas medical advertising cannot use a trade name alone

Anything we must NEVER say or promise ("painless", "best", guaranteed results, comparisons to other practices, before-and-after images without consent, weight-loss or health claims, a procedure name in a text)?

4. Current Tools & Access

List what you use now. We will decide together what gets replaced, connected, or left alone. 'Cost' can be a guess.

K = keep · R = replace with the new system · C = connect / integrate · ? = not sure

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Practice management / EHR (Dentrix, Open Dental, Eaglesoft, Curve, Denticon, Nextech, WebPT, ChiroTouch)				
Patient communication (Weave, Solutionreach, NexHealth, RevenueWell)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Online scheduling (NexHealth, Zocdoc, LocalMed)				
Digital forms / intake (PMS forms, IntakeQ)				
Phone system (Weave, RingCentral, Mango Voice)				
Call recording / tracking				
Email hosting (Google / Microsoft)				
Domain registrar & DNS				
Website host / builder (ProSites, Officite, other)				
Patient financing (CareCredit, Cherry, Sunbit)				
Payments / text-to-pay				
Insurance eligibility / clearinghouse (Vyne, DentalXChange, Availity)				
Membership plan software (Kleer, BoomCloud)				
Review management (Birdeye, Podium, Weave)				
Facebook / Instagram ads account				
Google Ads account				
Analytics and pixels (GA4, Meta Pixel, TikTok)				
Med spa booking (Boulevard, Zenoti, Vagaro)				
Spreadsheets / shared drives (unscheduled treatment, recall lists)				
Other				

Roughly what does all of that cost per month, combined? And which tool frustrates the team most?

Do you already pay for an automation / CRM platform account of your own?

☐ No ☐ Yes – we own it ☐ Yes – through another agency ☐ Not sure

5. Where Leads Come From Today

Tick each source and give a rough monthly count. Guesses are fine; we'll replace them with real numbers in week one.

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Google search / Maps		☐ Google Ads	
☐ Facebook / Instagram ads		☐ Insurance directory listings	
☐ Referring providers		☐ Patient referrals	
☐ Zocdoc / online marketplaces		☐ Website booking requests	
☐ Walk-ins / phone-ins		☐ Employer / benefits referrals	
☐ Community events, schools and youth sports		☐ Adjacent businesses (gyms, salons)	
☐ Reactivated past patients		☐ Review sites (Yelp, Healthgrades, RealSelf)	
☐ Other:			

Calls answered %

Inquiry → booked %

Booked → showed %

Treatment presented → accepted % (case acceptance)

Walk us through the first 5 minutes after a lead arrives right now. Who sees it, how, and how fast does a human respond?

What happens to a lead that doesn't answer the first call? How many attempts, over how many days, and who tracks it?

What happens to someone who isn't ready to buy yet? Do they ever hear from you again?

Which of these leak the most business today?

- ☐ New-patient calls go to voicemail
- ☐ Overdue recare patients aren't contacted
- ☐ Paperwork and insurance cards missing at check-in
- ☐ After-hours inquiries wait until morning
- ☐ Broken appointments aren't re-booked
- ☐ Membership and series renewals lapse
- ☐ Unscheduled treatment is never followed up
- ☐ Inactive patients never hear from us

Other:

6. Pipeline

We will build your pipeline exactly as you run it. Edit the stages below or write your own; tell us what should happen automatically at each one.

Suggested stages: Inquiry → Contacted → Booked → Showed → Treatment Presented → Accepted
Side lanes: Unscheduled Treatment (90 days) · Recare Due / Overdue (perpetual) · Reactivation (6-12, 12-18, 18-24, 24+ months) · Broken Appointment / ASAP List · High-Ticket Consult

Your actual stages, in order (or 'use suggested')

STAGE	WHAT SHOULD HAPPEN AUTOMATICALLY HERE? (TEXT, EMAIL, TASK, NOTIFY A PARTNER)	WHO IS RESPONSIBLE

Do you have a signed BAA with every tool that sends patient messages today? ☐ Yes ☐ No

Are there any Meta Pixel, GA4 or TikTok pixels on your booking, intake or consent pages? ☐ Yes ☐ No

Do patients with unscheduled treatment hear from you after they leave? ☐ Yes ☐ No

7. Referral Partners

The people who send you business. This is usually the biggest growth lever and the least tracked.

PARTNER TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Referring providers (GPs, PCPs, other dentists)
- ☐ Specialists you refer to
- ☐ Gyms and fitness studios
- ☐ Salons, estheticians and bridal
- ☐ Employers and benefits brokers
- ☐ Schools and youth sports
- ☐ Real estate / relocation (new-in-town patients)
- ☐ Community organizations

Other:

How do you track which partner sent which customer, and does the partner ever see that record?

What do you do for partners today (co-branded material, events, updates)? What would you like to do?

> **Note.** Nobody is paid per patient: Texas and Florida criminalize paying for patients regardless of payer, and the federal anti-kickback statute applies wherever Medicare is involved. What is allowed is co-marketing and education: fixed-fee sponsorships, reciprocal promotion, lunch-and-learns and community events, with any per-referral cash off by default and reviewed by counsel. Partner reports show aggregate, de-identified counts only, never a patient's name, initial, visit date or treatment.

Partners you want to add in the next 90 days (#)

Who owns partner relationships?

8. After the 'Yes'

Documents or items you chase most often

- ☐ New-patient forms
- ☐ Health history
- ☐ Notice of Privacy Practices acknowledgment
- ☐ Photo / testimonial consent
- ☐ Insurance card (front and back)
- ☐ Photo ID
- ☐ Financing application completed
- ☐ Signed treatment plan / financial agreement
- ☐ Membership plan enrollment form
- ☐ Outstanding patient balance

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Post-visit check-in
- ☐ Same-day review request (to every patient)
- ☐ Recare appointment booked before leaving
- ☐ Birthday / holiday touches
- ☐ Membership renewal reminders
- ☐ Due-for-tox / series reminders
- ☐ Referral ask
- ☐ Nothing consistent

Past customers in your database (#)

Last time they all heard from you

% of business from repeat / referral

Describe your dream after-the-sale program in one paragraph. What would make a past customer call you first next time?

9. Monthly Time Audit

Where the hours actually go. Estimate hours per month per task and who does it. This tells us what to automate first and how to price the monthly.

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Answering new-patient calls and web forms				☐
Returning missed calls and voicemails				☐
Appointment confirmations				☐
Re-booking no-shows and same-day cancels				☐
Filling openings from the ASAP / short-call list				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Pulling and working the recare list				☐
Reactivating inactive patients				☐
Following up unscheduled treatment				☐
High-ticket consult follow-up				☐
Sending and chasing intake forms and consents				☐
Insurance card chase and verification				☐
Review requests				☐
Membership and series renewals				☐
Payment collection and balance reminders				☐
Post-visit check-ins				☐
Printing huddle numbers and end-of-day reports				☐
Social media posting				☐
Data entry between the PMS, comms tool and spreadsheets				☐
Checking who is in treatment or on a membership but not billed				☐
				☐
				☐

What do you dread every month? What always falls through the cracks?

What would you do with 20 extra hours a month?

If this were running perfectly 90 days from now, what would be different? (Be specific: numbers, feelings, what you'd stop doing.)

10. Your Operating Rhythm -- reports and recurring tasks

Tick the reports you actually run or receive, and tell us where each comes from and who pulls it. 'We can make it' is our proposal: FULL = runs by itself, you just receive it · SEMI = we build it, one person approves or does one step · ASSIST = a person still does it, we prep, remind, log and report. In the last column tell us what you want: F / S / K (keep manual).

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Morning Huddle Sheet	☐			FULL	
End-of-Day Unscheduled Treatment Report	☐			FULL	
Production vs. Goal (weekly)	☐			SEMI	
New Patients by Source	☐			FULL	
Calls Answered / Missed	☐			FULL	
Confirmation Rate	☐			FULL	
Broken Appointment / No-Show Report	☐			FULL	
Recare Due / Overdue List	☐			FULL	
Reactivation Results by Band	☐			FULL	
Case Acceptance by Provider	☐			SEMI	
Consult-to-Start Conversion (high-ticket)	☐			FULL	
Unverified Insurance (48 hours out)	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Membership / Series Renewal Report	☐			FULL	
Review / Reputation Report	☐			SEMI	
Patient Balances / A/R	☐			ASSIST	
Insurance Claims Aging	☐			ASSIST	
Patient balances / overdue invoices	☐			FULL	
Billing reconciliation	☐			FULL	
	☐			--	
	☐			--	

Other things done on a schedule that aren't on the list

Think: Morning huddle, end-of-day unscheduled report, weekly production vs. goal, recare list pull, next-day insurance verification, BAA and HIPAA training review, provider license and CE renewals, credentialing updates.

TASK	DAILY / WEEKLY / MONTHLY	SYSTEM OR WEBSITE IT LIVES IN	WHO DOES IT	HOURS / MO	F / S / K

Which of these would you hand off tomorrow if you trusted the output? Which ones would you never hand off?

The systems we need to reach, and how you add us as a user (no shared logins), are on the **Systems** page near the end.

11. Starting Points -- the three packages

Three packages, one system. Everything in Launch is in Growth; everything in Growth is in Full Engine. Prices are starting points, confirmed in your written quote.

Launch

$3,500 build, starting point

then **$697 / mo**, platform included

Foundation + every lead answered fast. For a small team whose main leak is response time and follow-up.

Growth

$6,500 build, starting point

then **$1,197 / mo**, platform included

Launch + onboarding, retention, database re-activation, your industry engine, the AI assistant and the full Monday report. The package most businesses land on.

Full Engine

$9,500 build, starting point

then **$1,697 / mo**, platform included

Growth + the referral-partner program with statements, partner outreach, recruiting, every operating-rhythm automation and the monthly automation think-tank.

For a practice: Launch covers missed-call text-back and a sub-60-second reply on every new-patient inquiry, an online booking request with HIPAA notice and consent capture and no pixels, booking with confirmations, the 5-day drip, a same-day review request sent to every patient, PHI-free templates, two 10DLC campaigns prepared, BAA coverage confirmed for each channel before launch, and the daily recap and weekly funnel report; Growth adds the Full-Chair Engine (recare autopilot, unscheduled-treatment follow-up, high-ticket consult pipeline, reactivation ladder, no-show recovery and ASAP list, membership and series renewals, digital intake and consent chase, post-visit check-in, insurance verification flag and the huddle sheet), text-to-pay, per-provider pages, the after-hours assistant and the live dashboard; Full Engine adds the count-only partner program with referring-provider, community, employer, school and relocation lanes, hygienist, assistant and injector recruiting, the operating-rhythm automations, internal alerts and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Full-Chair Engine

- Recare Autopilot: a 3-touch text and email sequence from 30 days before the due date to 90 days past due, with a tap-to-book link
- Unscheduled-Treatment Follow-Up: non-clinical nudges at day 0, 7, 14, 30, 60 and 90 with a financing link and a treatment-coordinator call option, no procedure names
- High-Ticket Consult Pipeline: pre-consult prep, same-day thank-you, financing link, 7/14/30-day touches and consult-to-start by provider
- Reactivation Ladder: the inactive list segmented at 6-12, 12-18, 18-24 and 24+ months, each with its own campaign under written marketing consent
- No-Show Recovery and ASAP List: an automatic re-book text, and a cancellation texts the short-call list with staff confirming the slot
- Membership and Series Renewals: in-house plan renewals, due-for-tox reminders and package expiry at 30, 14 and 3 days, with payment links
- Digital Intake and Consent Chase: forms, health history, NPP and photo consent sent at booking and chased, with a staff checklist 48 hours out
- Post-Visit Check-In and Review Request: a non-clinical check-in that routes replies to a clinical inbox, and an ungated same-day review request
- Insurance Verification Flag: the patient is asked for an insurance card photo and unverified visits are flagged 48 hours out
- Huddle Sheet: morning huddle numbers and the end-of-day unscheduled report assembled from CRM data

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
FOUNDATION				
White-labeled platform workspace	Your CRM, pipelines, calendars, phone, email and automations in one place under your brand; license included in the monthly	●	●	●
Branded email + business phone line	Your domain email and a tracked local number with call routing and recording (with disclosure)	●	●	●
Forms, booking pages and consent capture	Every form, landing page and calendar records written consent to call and text, with a privacy link	●	●	●
Business texting registration (A2P 10DLC)	We prepare the whole submission – EIN, address, privacy policy, sample messages matched to your consent language – and drive it through carrier review. You submit it under your own business identity, as the carriers require	●	●	●
Compliance shell	Timestamped consent records, opt-outs honored on every channel, quiet hours, required disclosure lines and a blocked-phrase list on every template	●	●	●
SALES ENGINE				
Pipeline built to your stages	Your process mapped into stages with side lanes, named the way your team talks	●	●	●
Instant response + round robin	Text + email to every new lead in under 60 seconds; claim-window assignment with automatic reassignment	●	●	●
Missed-call text-back	Every missed call gets a text with a booking link	●	●	●
5-day follow-up drip	Stops the moment they reply or opt out	●	●	●
Long-term nurture	Sized to your buying cycle, with a re-engagement alert when someone comes back	–	●	●
Appointments	Booking calendars per person, confirmations and reminders	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
Lead-source tagging	Every lead tagged by source at entry, so cost per sale by source is arithmetic	●	●	●
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●
After-hours AI assistant	Answers, qualifies and books when nobody is there, fenced by your industry's never-list	–	●	●
OPERATIONS & RETENTION				
Branded email templates	Your identifiers locked into every template	–	●	●
Client onboarding + invoicing	Welcome, what-happens-next, secure document upload, e-sign, payment links with reminders	–	●	●
Document / signature chase	Reminders with secure upload links until the checklist is complete; live checklist for staff	–	●	●
Database re-activation campaign	Old leads and past customers worked in a ramped, bounce-guarded, auto-unsubscribe campaign	add-on	●	●
Retention program	Anniversaries, check-ins, renewals, and the save flow when someone tries to leave	–	●	●
Industry engine: The Full-Chair Engine	Recare Autopilot; Unscheduled-Treatment Follow-Up; High-Ticket Consult Pipeline; Reactivation Ladder; No-Show Recovery and ASAP List; Membership and Series Renewals; Digital Intake and Consent Chase; Post-Visit Check-In and Review Request; Insurance Verification Flag; Huddle Sheet	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
Owner-routed onboarding	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per provider.	–	●	●
Billing that runs itself	Branded invoice email; a reminder ladder (3 days before due, due day, a 3-day grace nudge, a final notice at 7 days); card-on-file autopay with a 'charge coming up' notice and a 'card declined, update your card' notice; receipts; invoice defaults (terms, due days, logo, from address). Email-first. For you: patient balances, payment plans and memberships.	–	●	●
Auto-drafted invoices	When a client is added in your industry system, a blank draft invoice for that client appears in the CRM, ready for staff to fill in and send. Nothing reaches the client until a person sends it. On Growth it needs the third-party integration add-on. For you: drafts from the practice system.	–	add-on	●
Billing reconciliation	One view of who is billed, who paid, who is overdue and who is being missed, across the CRM, your industry system and any old processor. Catches clients who are active in service but not billed anywhere.	–	–	●
PARTNERS & GROWTH				
Referral partner program	Tracked link and printed QR card per partner; attribution written automatically at lead creation	add-on	add-on	●
Printable partner materials	Welcome packet, counter cards, one-pagers, version-numbered	–	–	●
Monthly partner statements	Sent automatically; what a statement may contain is set by the law in your industry	add-on	add-on	●
Partner outreach campaign	A campaign to add partners in your territory, tracked in a partner pipeline, with a no-fee version wherever a fee is illegal	add-on	add-on	●
Partner lanes	A separate pipeline and cadence per partner type	–	add-on	●
Recruiting funnel	Landing page, application, drip, interview booking; who it recruits is set for your industry	–	–	●
COMMAND & CONTROL				
Daily recap	End-of-day summary: leads, response times, appointments	●	●	●
Monday owner's report	Launch: the weekly funnel report. Growth and up: the full owner's report, written as what the business accomplished	○ lite	●	●
Live dashboard	One screen for the owner and managers instead of four logins	add-on	●	●
Operating-rhythm automations	The daily / weekly / monthly reports and tasks you mark in section 10	–	–	●
Internal task and alert flows	Unclaimed lead, stalled file, deadline at risk, negative review, manager escalation	–	–	●
Written procedures	Your team's own operations written down	–	–	●
Monthly business report	In addition to the weekly report	add-on	add-on	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
Handoff booklet + training	Every automation documented with screenshots; team trained; Full Engine keeps it current	●	●	●
Priority support	Named contact, weekly 20-minute call, same-day changes	–	–	●
Monthly automation think-tank	A working session every month: we find what your team still does by hand and design and build a custom automation for it	–	–	●

● = included · o lite = lighter version (see description) · add-on = available on that package at the add-on price · – = not included.

Every monthly includes the platform license for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already pay for the platform we build on. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. One-time add-ons bought with the build are 15% less than added later; monthly add-ons are not discounted. Regulated industries get a compliance review in week one at no charge. Your accounts, data and content are yours and export any time, and you keep the right to use the system we built even if you cancel. Our templates and methods stay ours, so no one can resell them. Agreements and invoices come from Everborn Marketing LLC dba Everborn Productions.

Add-ons – attach to any package (fixed fees; starting points, confirmed in your written quote). Tick any you want quoted.

QUOTE IT?	ADD-ON	FEE	NOTE
WEBSITES & SEARCH			
☐	**Online Presence: Starter (bundle)**	**$1,800**	Core site + Local SEO foundation + social profile set-up; $2,200 separately
☐	**Online Presence: Complete (bundle)**	**$3,200**	Full site + Local SEO foundation + brand kit + social profile set-up; $4,000 separately; first month of Local SEO growth free
☐	**Website build: core site**	**$1,200**	Up to 6 pages (home, about, services/products, apply/contact, reviews, compliance/disclosures); lead capture and booking wired to the CRM; mobile, speed and basic on-page SEO
☐	**Website build: full site**	**$2,400**	Up to 15 pages, including per-product/service pages, location pages, team or rep pages, a recruiting page and blog set-up
☐	**Website redesign / migration**	**$900**	Existing site rebuilt or moved, with redirects kept so rankings are protected
☐	**Additional pages (per 5)**	**$350**	Product, location, landing or partner pages
☐	**Local SEO foundation**	**$750**	Google Business Profile optimization, top citations with consistent name/address/phone, on-page SEO and schema, Search Console and analytics set-up, a service-area page plan
☐	**Google Business Profile set-up & optimization**	**$250**	Standalone, if Local SEO foundation isn't bought
☐	**Brand kit**	**$600**	Logo refresh, colors, fonts, email signature, social and document templates
☐	**Social profile set-up**	**$250**	Branded Facebook, Instagram, LinkedIn and YouTube profiles linked to the CRM
☐	**Accessibility review & fixes**	**$450**	WCAG review of the site, with the fixes made
☐	**Google Ads account build**	**$600**	One-time campaign build; ongoing management is the paid ad management line
☐	**Local SEO growth (monthly)**	**$350 / mo**	2 articles a month, weekly Google Business Profile posts, citation and review monitoring, a rank and traffic report
☐	**Website care plan (monthly)**	**$49 / mo**	Hosting, updates, backups, uptime monitoring, compliance-page upkeep and small edits
REVENUE CHANNELS			
☐	**Referral / affiliate program**	**$3,500**	Included in Full Engine
☐	**Partner prospect research (per 100 contacts)**	**$750**	
☐	**LinkedIn prospecting pipeline**	**$1,200**	
☐	**Cold outreach engine (per engine)**	**$3,500**	
☐	**Owned-list reactivation**	**$1,500**	Included in Growth and up
SYSTEMS & DATA			
☐	**Third-party integration**	**$2,500**	Connects the platform you already run on
☐	**Client data migration**	**$1,500**	
☐	**Custom reporting automation**	**$2,500**	
☐	**Executive reporting**	**$1,200**	Monthly business report included in Full Engine
☐	**Performance dashboard**	**$1,800**	Live dashboard included in Growth and up
CREATIVE & COLLATERAL			
☐	**Video ad production**	**$1,500**	
☐	**Document set**	**$2,000**	
☐	**QR capture system**	**$900**	
☐	**Lead magnet**	**$1,200**	Includes the capture page and follow-up

QUOTE IT?	ADD-ON	FEE	NOTE
STRATEGY & RISK			
☐	**Growth audit & 12-month plan**	**$2,500**	
☐	**Industry compliance review**	**$1,500**	Week-one review free in regulated industries; this is the full written review
☐	**Messaging & carrier registration**	**$900**	Registration prep is included in every package
☐	**Operations audit**	**$1,500**	
ONGOING -- BILLED MONTHLY			
☐	**Paid ad management**	**$800 / mo**	Ad spend billed direct to the platform
☐	**Additional campaign management**	**$400 / mo**	
☐	**Partner channel management**	**$600 / mo**	
☐	**Deliverability & compliance monitoring**	**$300 / mo**	
☐	**Content production**	**$700 / mo**	

We never guarantee search rankings or traffic. Bundle prices replace the 15% with-the-build add-on discount; they don't stack. **Moving your payment processor: included at no charge.**

Which package are you leaning toward?

☐ Launch ☐ Growth ☐ Full Engine ☐ Not sure – recommend one

Anything about the packages or add-ons you want us to explain on the call?

12. What We Can Take Off Your Plate

Tick everything that sounds useful. Write your top three below. This becomes the build order.

`[L] included in Launch and up · [G] Growth and up · [F] Full Engine · [+] add-on, any package`

NEW-PATIENT FRONT DOOR

- ☐ Missed-call text-back and a sub-60-second reply to every new-patient inquiry `[L]`
- ☐ Online booking request with HIPAA notice acknowledgment and TCPA consent, with no tracking pixels on booking pages `[L]`
- ☐ Booking calendars per provider with confirmation and reminder sequences `[L]`
- ☐ Lead-source tagging so cost per new patient by source is arithmetic `[L]`
- ☐ 5-day follow-up for inquiries that didn't book, stopping on reply `[L]`
- ☐ After-hours assistant that answers hours, pricing ranges, financing and insurance questions and books; it escalates anything clinical and never discusses a patient's care `[G]`

CHAIRS & SCHEDULE

- ☐ Recare autopilot: 3-touch sequence from 30 days before due to 90 days past due, with tap-to-book `[G]`
- ☐ No-show recovery: automatic re-book text, and an ASAP-list text when a slot opens, staff confirm `[G]`
- ☐ Reactivation ladder by band (6-12, 12-18, 18-24, 24+ months) under written marketing consent `[G]`
- ☐ Morning huddle sheet and end-of-day unscheduled report assembled for you `[G]`
- ☐ Per-provider landing pages and QR cards, each with its own review link `[G]`

TREATMENT & CONSULTS

- ☐ Unscheduled-treatment follow-up at day 0, 7, 14, 30, 60 and 90, no procedure names, dollars pending by provider `[G]`
- ☐ High-ticket consult pipeline: prep text, same-day thank-you, financing link, 7/14/30-day touches `[G]`
- ☐ Text-to-pay for the patient portion, with statement reminders `[G]`
- ☐ Membership and series renewals and due-for-tox reminders, with payment links `[G]`
- ☐ Branded email templates with provider and practice identifiers locked in `[G]`

PAPERWORK & PATIENT EXPERIENCE

- ☐ Digital intake: forms, health history, NPP and consent sent at booking and chased, with a live checklist 48 hours out `[G]`
- ☐ Insurance card chase and a 48-hour unverified-visit flag `[G]`
- ☐ Post-visit check-in with replies routed to a clinical inbox `[G]`
- ☐ Same-day review request to every patient, never gated by sentiment `[L]`
- ☐ PMS integration beyond the nightly export (e.g. through the PMS vendor's developer program) `[+]`

PARTNERS & GROWTH

- ☐ Partner program with a tracked link and QR per partner and count-only attribution `[F]`
- ☐ Monthly partner statements with aggregate, de-identified counts only `[F]`
- ☐ Referring-provider, adjacent-business, employer, school and relocation lanes `[F]`

- [ ] Partner outreach to local businesses (B2B, CAN-SPAM compliant), stating plainly that nobody is paid for patients [F]
- [ ] Recruiting funnel for hygienists, assistants and injectors [F]

COMMAND & CONTROL

- [ ] Daily recap and weekly funnel report [L]
- [ ] Full Monday practice report and live dashboard: calls, booked, showed, presented and accepted by provider and source [G]
- [ ] BAA coverage confirmed for each channel before launch; any tool not yet covered never sees PHI [L]
- [ ] Compliance shell: PHI-free templates, quiet hours, STOP handling, the 3-per-week cap on exempt messages [L]
- [ ] Two 10DLC campaigns prepared (informational and promotional) [L]
- [ ] Internal alerts: unverified insurance 48 hours out, a plan over your dollar threshold unscheduled for 14 days, a VIP no-show [F]
- [ ] Monthly automation think-tank: a working session to design and build a custom automation for whatever the front desk still does by hand [F]

MONEY DESK

- [ ] Owner-routed onboarding: every new patient gets the welcome from their own provider – the provider's name, email and own sign-up link – so the file lands in that provider's queue; one message per patient, never duplicates [G]
- [ ] Secure two-step intake: patient information never by email; the welcome sends the patient to a secure HIPAA intake form that files it straight into your system of record, with BAA coverage confirmed for each channel before launch [G]
- [ ] Billing that runs itself for patient balances, payment plans and memberships: branded invoice email, a reminder ladder (3 days before, due day, 3-day grace, final notice at 7 days), card-on-file autopay with 'charge coming up' and 'card declined' notices, receipts [G]
- [ ] Auto-drafted invoices: a patient added in your practice system creates a blank draft invoice in the CRM for staff to finish and send; nothing reaches the patient until a person sends it (on Growth, with the third-party integration add-on) [F]
- [ ] Billing reconciliation: who is billed, who paid, who is overdue and who is being missed, across the CRM, your practice system and any old processor [F]
- [ ] Moving your payment processor, included at no charge: every paying patient moved to new payment links or card-on-file; old invoices cancelled only after payment clears [L]

Top pick #1

Top pick #2

Top pick #3

Anything you want that isn't on the list

13. Compliance & Consent

Your industry's marketing is regulated. We build the guardrails in; you tell us your rules.

Which apply to you?

- [ ] HIPAA: a signed BAA with every tool that touches PHI, before any contact import
- [ ] No tracking pixels on booking, intake or consent pages
- [ ] PHI-free message templates (no procedure, condition, test or medication names)
- [ ] TCPA healthcare exemption for reminders and recall (no more than 1 a day and 3 a week, no marketing content)
- [ ] Written marketing consent before any promotional sequence
- [ ] State board advertising rules (licensee name, no guarantees, superlatives or comparisons)
- [ ] Testimonial and before/after consent, with a results-may-vary line
- [ ] FTC Consumer Reviews Rule: no review gating and no incentives tied to sentiment
- [ ] Anti-kickback and patient-brokering laws (no per-patient payments)
- [ ] HIPAA marketing authorization for any third-party-paid promotion
- [ ] FDA / FTC: no off-label or unsubstantiated efficacy claims (med spa)
- [ ] Email CAN-SPAM opt-out

Other:

Is the front desk currently texting patients from a system covered by a BAA? ☐ Yes ☐ No

Do your forms capture written consent for promotional messages, separate from reminders? ☐ Yes ☐ No

Does anyone review marketing and testimonials before they go out? ☐ Yes ☐ No

Do you bill Medicare for any service? ☐ Yes ☐ No

Compliance officer / attorney (name, email)

Turnaround needed for approvals

Any past complaints, audits, or rules from a regulator we should design around?

14. Reporting & Communication

Who receives the Monday report? (names, emails)

Best day / time

Numbers you care about most

- ☐ New-patient inquiries by source
- ☐ Calls answered vs. missed
- ☐ Speed to first response
- ☐ Booked / showed
- ☐ Confirmation rate
- ☐ Broken appointments and re-books
- ☐ Treatment presented vs. accepted, by provider
- ☐ Unscheduled treatment dollars pending
- ☐ Recare and reactivation bookings
- ☐ Cost per new patient by source
- ☐ Membership / series renewal rate
- ☐ Reviews

Other:

How do you want us to communicate during the build?

☐ Text ☐ Email ☐ Weekly call ☐ Shared doc ☐ Slack / Teams

15. Access Checklist

We will request these on the intake call. Tick what you can provide now. Nothing is changed without your sign-off.

- ☐ Nightly PMS export path for the unscheduled, recall-due and inactive reports (or API access where the PMS allows it)
- ☐ Admin access to your current comms tool (Weave / Solutionreach / NexHealth), so patients don't get double messages
- ☐ Booking, intake and consent page URLs
- ☐ Facebook Business Manager + page admin
- ☐ Google Workspace / Microsoft 365 admin
- ☐ Current intake forms, health history and NPP versions
- ☐ Legal name, EIN, address and website with privacy policy (required for business texting registration)
- ☐ Signed BAAs on file for your PMS, comms tool and forms tool
- ☐ Website login and a list of the analytics and pixels installed
- ☐ Google Business Profile manager access
- ☐ Google Ads account
- ☐ Domain registrar / DNS login
- ☐ Signed testimonial and before/after consent forms
- ☐ Existing phone numbers to port or forward

Anything else we should know before we start?

Systems, and how we get access

Where a system lets you add us as a user with our own login, you do that. Where it connects by sign-in, you sign in and click Allow. Anything else we set up live with you on a screen share.

SYSTEM	WEB ADDRESS	HOW WE GET ACCESS	WHO ON YOUR SIDE ADDS US
PMS / EHR (Dentrix, Open Dental, Eaglesoft, Curve, N		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Weave	getweave.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Solutionreach	solutionreach.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
NexHealth	nexhealth.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Zocdoc provider account	zocdoc.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CareCredit provider center	carecredit.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Cherry	withcherry.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Sunbit	sunbit.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Insurance clearinghouse / eligibility (Vyne, DentalXCha		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Payer provider portals (e.g. Delta Dental)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Website / booking page host		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Med spa booking (Boulevard, Zenoti, Vagaro)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Meta Business Suite	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Ads	ads.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Yelp for Business	biz.yelp.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Healthgrades / RealSelf profile	healthgrades.com / realself.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Business email admin / domain registrar	admin.google.com / admin.micros	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	

We never ask for or store passwords.
You stay in control and can remove our access at any time.

Return this packet through a secure upload link, not by email.

Sign-off

Nothing here commits you to anything. Within two business days you get a one-page Client Brief and a fixed quote.

Client – name	Client title	Client signature	Client date

Your agreement and invoices come from Everborn Marketing LLC dba Everborn Productions.

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			