CLIENT INTAKE PACKET · FILLABLE

Credit Repair Intake Packet

Everything we need to build your 60-second email and call-back front door, your enrollment and dispute-round client communications, your decline recovery and saves, and your partner statements. 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

Chris Magee · Everborn Productions
everbornproductions@gmail.com · (916) 541-3415

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)

DBA

State of operation

States served

CSO registration number (per state, from the certificate)

Surety bond amount (per state, from the bond)

Year founded

Business address (city, state, zip)

Active client count

Monthly fee (billed in arrears)

Company type

- ☐ Independent credit repair company
- ☐ Credit repair + credit education / coaching
- ☐ Credit repair inside a larger financial services business
- ☐ Attorney-affiliated practice
- ☐ Partner-driven (dealers, apartment communities, tax preparers)
- ☐ New company (under one year)

Other:

Products / services you actively sell

- ☐ Monthly credit repair (billed after the work)
- ☐ Couples / joint plans
- ☐ Credit analysis consult
- ☐ Credit education / coaching
- ☐ Identity theft assistance
- ☐ Monitoring enrollment (IdentityIQ, SmartCredit, MyScoreIQ)
- ☐ Budgeting / financial coaching
- ☐ Business credit building
- ☐ Post-graduation maintenance plan

Other:

New enrollments per month

Monthly fee per client (billed in arrears)

Average months a client stays

12-month active-client goal

In one or two sentences, who is your ideal client and what are they getting ready for (a car, a home, an apartment)?

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 / Sales rep / consultant / Dispute processor / Client success / retention / Partner manager / Admin / billing)	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 grabs it first
- ☐ Owner takes every consult
- ☐ Round robin (by rule)
- ☐ By partner / referral source
- ☐ By state
- ☐ Each rep works only their own leads

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)
- ☐ Rep headshots
- ☐ Current CROA contract, information statement and notice of cancellation
- ☐ Existing email templates
- ☐ Testimonials with signed consent
- ☐ Partner counter cards / flyers
- ☐ Video / explainer content

Other:

Google Business Profile link

Review links (Google Business Profile / Trustpilot / BBB / 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. 'Results vary. We do not remove accurate, current information from anyone's credit report.') – paste it exactly

Plus your business address on every email – paste any state-required wording exactly

Anything we must NEVER say or promise (score points, a timeline for results, "remove accurate items", "delete collections", "guaranteed", "legally remove", CPN or a new credit file, that a partner's loan or car deal will be approved)?

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 / ?
Dispute software (DisputeFox, Credit Repair Cloud, Client Dispute Manager, DisputeBee)				
Credit monitoring (IdentityIQ, SmartCredit, MyScoreIQ)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / voice (call-back dialer, voicemail drop)				
Email hosting (Google / Microsoft)				
Domain registrar & DNS				
Website host / builder				
CRM (existing CRM / automation platform, other, spreadsheet)				
Payment processor / gateway (NMI, Authorize.net)				
Recurring billing tool				
E-signature (CRM documents, DocuSign)				
Calendar / booking				
Automation connector (Zapier, Make)				
Dispute letter print and mail service				
Email marketing (Mailchimp, CRM email)				
Facebook / Instagram ads account				
Review management				
Twilio / carrier Trust Center				
Shared drive for the consent and disclosure log (Google Drive)				
Spreadsheets (partner tracking, fee tiers)				
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
☐ Facebook / Instagram ads (Special Ad Category)		☐ Website forms	
☐ Auto dealer referrals		☐ Mortgage loan officer referrals	
☐ Realtor referrals		☐ Apartment community referrals	
☐ Tax preparer referrals		☐ Attorney referrals	
☐ Past-client referrals		☐ Organic social / video	
☐ QR counter cards		☐ Old lead list re-activation	
☐ Purchased leads / affiliates		☐ Workshops / events	
☐ Other:			

Lead → consult booked % | **Consult booked → showed %** | **Showed → enrolled %** | **Cost per enrolled client (if known)**

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?

- ☐ Slow first response on Meta leads
- ☐ No follow-up after 2-3 tries
- ☐ Consult no-shows aren't re-booked
- ☐ Enrollment paperwork stalls
- ☐ Clients stuck waiting on documents or the monitoring login
- ☐ Silence between rounds
- ☐ Card declines and expired cards
- ☐ Cancellation requests with no save call

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: New Lead → Contacted → Called → Follow-Up → Booked Consultation → Sold → Onboarding → In Progress → 30/60/90-Day → Ongoing Maintenance
Side lanes: No-Show · Not Interested · Not Ready Yet / Nurturing (52 weeks) · Re-Engaged · Definite No

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

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

Is your company sending any texts today (10DLC or toll-free)? ☐ Yes ☐ No

Is every client billed only after the work for that cycle is performed? ☐ Yes ☐ No

Do your referring partners get a monthly statement today? ☐ 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

- ☐ Auto dealers / F&I offices
- ☐ Apartment communities / property managers
- ☐ Tax preparers
- ☐ Mortgage loan officers (no-fee program)
- ☐ Realtors (no-fee program)
- ☐ Attorneys (no-fee program)
- ☐ Past clients

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. Dealers, apartment communities and tax preparers may be paid under a written partner agreement, reviewed once per state. Mortgage LOs, realtors and attorneys get the separate no-fee program (co-branded education, fast turnaround and a ready-to-re-apply count), because the return referral to a lender is RESPA-covered and lender compliance departments bar vendor referral fees. No partner ever sends you a credit application or bureau pull; the consumer self-refers by QR code or link.

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

- ☐ Signed CROA contract
- ☐ State information statement
- ☐ Notice of cancellation
- ☐ Photo ID
- ☐ Proof of address
- ☐ SSN card or utility bill
- ☐ Monitoring login (IdentityIQ / SmartCredit)
- ☐ Tri-merge report
- ☐ Payment method on file
- ☐ Consumer release for first-name notification to the referring partner
- ☐ Bureau response letters the client receives by mail

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Graduation email and review request
- ☐ Ready-to-return hand-back to the referring partner
- ☐ 6-month re-check
- ☐ 12-month re-check
- ☐ Maintenance plan offer
- ☐ Referral ask
- ☐ Credit education newsletter
- ☐ 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 leads by email and phone				☐
Booking and re-booking free consults				☐
Collecting the tri-merge and monitoring login				☐
Sending and chasing the enrollment packet				☐
Collecting ID, proof of address and SSN card or utility bill				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Scheduling dispute rounds				☐
Telling clients a round went out				☐
Monthly progress reports to clients				☐
Failed payments and expired cards				☐
Cancellation save calls				☐
Re-activating old leads and past clients				☐
Referral partner statements				☐
Ready-to-return calls to dealers and LOs				☐
Partner recruiting outreach				☐
Filing consent records and signed agreements				☐
Weekly numbers for the owner				☐
Data entry between dispute software, CRM and billing				☐
Figuring rep commissions				☐
Checking who is active 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
Leads by Source / Cost per Enrollment	☐			FULL	
Speed-to-Lead / Response Time	☐			FULL	
Consults Booked / Showed / Enrolled	☐			FULL	
Enrollment Packet Status	☐			FULL	
Document Checklist (who is stuck where)	☐			FULL	
Late-Round Alert Report	☐			FULL	
Client Progress Reports (30/60/90, monthly)	☐			SEMI	
Billing, Declines and Recoveries	☐			FULL	
Cancellations and Saves Report	☐			FULL	
Active Client Count and Churn	☐			FULL	
Monthly Partner Statements	☐			FULL	
Ready-to-Return Count	☐			SEMI	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Re-Activation Campaign Results	☐			FULL	
Consent and Disclosure Log	☐			FULL	
Card Dispute / Chargeback Rate	☐			SEMI	
CSO Registration and Bond Renewals	☐			ASSIST	
Commission statement per rep	☐			FULL	
Billing reconciliation	☐			FULL	
	☐			--	
	☐			--	

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

Think: Round scheduling, monthly billing run, pre-bill notices, partner statement run, bond and registration renewals by state, counter card reprints, re-activation send windows, compliance review of new templates.

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 credit repair company: Launch covers an email and automatic call-back attempt to every lead in under 60 seconds (carriers forbid SMS for this category), voicemail drop plus email on missed calls, round robin to reps, consult booking with reminders, the 5-day drip on email and voice, a Trust Center review with a written A2P recommendation, the compliance shell with the standing disclaimer, banned-phrase list and Georgia geo-fence, a review request on a good result or graduation, and the daily recap and weekly funnel report; Growth adds the Dispute-Cycle Engine (enrollment packet flow, document chase, dispute software sync, round-went-out and results emails, progress reports, decline and expired-card recovery, cancellation save lane, greenlight flag, graduation re-checks and the compliance guard), the 52-week nurture, owned-list re-activation, per-rep pages, the after-hours assistant and the live dashboard; Full Engine adds the partner program with counter cards and monthly statements for dealers, apartment communities and tax preparers, the separate no-fee program for LOs, realtors and attorneys, partner outreach, rep and processor recruiting, and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Dispute-Cycle Engine

- Enrollment Packet Flow: the CROA contract, state information statement and notice of cancellation sent on Sold and chased at 1, 24 and 72 hours, with the cancellation window tracked and the first bill set after the first work date
- Document Chase with Live Checklist: ID, proof of address, SSN card or utility bill and the monitoring login, each with an upload link and reminders
- Dispute Software Sync: DisputeFox, Credit Repair Cloud or Client Dispute Manager pushes status, stage, round and results into hidden CRM fields
- Round-Went-Out and Results Emails: branded, compliant emails on the round date and on result changes, with a late-round alert to staff
- 30/60/90-Day and Monthly Progress Reports: a per-bureau before-and-after table with honest declines, no score in the message body, owner copied
- Decline and Expired-Card Recovery: a pre-bill notice 48 to 72 hours ahead, then an email and voice sequence with a self-serve card-update link
- Cancellation Save Lane: a hold stage, a call task inside the hour, a what-we-have-disputed summary and a pause offer, with a saves report
- Greenlight Flag: when a client crosses your internal threshold, the ready fields set and the rep gets a call-the-partner task; the threshold is never shown to anyone
- Graduation and 6/12-Month Re-Check: past clients get a re-activation touch at 6 and 12 months after graduation
- Compliance Guard: a banned-phrase check on every template and AI response, and a time-stamped consent and disclosure log filed to Drive

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 email, with a privacy link	●	●	●
Trust Center review	A Trust Center review and a written recommendation. Carriers do not approve credit repair for business texting, so no registration is sold	●	●	●
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	Email to every new lead in under 60 seconds plus an automatic call-back (carriers forbid SMS for credit repair); claim-window assignment with automatic reassignment	●	●	●
Missed-call voicemail drop + email	Every missed call gets an immediate voicemail drop and an email with a booking link	●	●	●
5-day follow-up drip	Stops the moment they reply or opt out	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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	●	●	●
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 Dispute-Cycle Engine	Enrollment Packet Flow; Document Chase with Live Checklist; Dispute Software Sync; Round-Went-Out and Results Emails; 30/60/90-Day and Monthly Progress Reports; Decline and Expired-Card Recovery; Cancellation Save Lane; Greenlight Flag; Graduation and 6/12-Month Re-Check; Compliance Guard	–	●	●
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.	–	●	●
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.	–	●	●
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 dispute platform.	–	add-on	●
Commission ledger	Commissions calculated from money actually collected, not signed deals, using your own plan rules (splits, first-half / second-half payouts, clawbacks, lead-type rates), with a monthly statement per rep and a 'needs attention' list.	–	–	●
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	o lite	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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	●
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 · ○ 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

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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
	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**	Not offered for credit repair: carriers do not approve the category
☐	**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`

FRONT DOOR (EMAIL AND VOICE, NO SMS)

- ☐ Instant email and an automatic call-back attempt to every lead in under 60 seconds `[L]`
- ☐ Voicemail drop plus email on every missed call `[L]`
- ☐ Round robin to reps with a claim window `[L]`
- ☐ Consult booking calendar with reminders and no-show re-book `[L]`
- ☐ Lead-source tagging for Meta, website, QR and partner links `[L]`
- ☐ After-hours assistant scripted never to discuss scores, timelines or outcomes `[G]`

ENROLLMENT & ONBOARDING

- ☐ Enrollment packet on Sold: CROA contract, information statement and notice of cancellation, chased at 1, 24 and 72 hours `[G]`
- ☐ Cancellation window tracked; first bill scheduled only after the first work date `[G]`
- ☐ Document chase with a live checklist: ID, proof of address, SSN card or utility bill, monitoring login `[G]`
- ☐ Dispute software sync: status, stage, round and results into hidden CRM fields `[G]`
- ☐ Per-rep landing pages and QR cards `[G]`

DURING THE ROUNDS

- ☐ Round-went-out and results emails, with a late-round alert to staff `[G]`
- ☐ 30/60/90-day and monthly progress reports, with no score in the message body `[G]`
- ☐ Graduation and 6/12-month re-check `[G]`
- ☐ Review request on a good result or graduation, sent to every client, never filtered by sentiment `[L]`
- ☐ Compliance guard: banned-phrase check on every template and AI response, consent and disclosure log filed to Drive `[G]`

BILLING & RETENTION

- ☐ Pre-bill notice 48 to 72 hours before each charge `[G]`
- ☐ Decline and expired-card recovery by email and voice, with a self-serve update link `[G]`
- ☐ Cancellation save lane: hold stage, call task inside the hour, what-we-have-disputed summary, pause offer `[G]`
- ☐ 52-week low-frequency nurture for leads who are not ready yet `[G]`

- [ ] Re-activation campaign across your old lead list (ramped, bounce-guarded, auto-unsubscribe) [G]

PARTNERS & READY-TO-RETURN

- [ ] Greenlight flag: when a client crosses your internal threshold, the rep gets a call-the-partner task (the threshold never appears anywhere) [G]
- [ ] Partner program with an attributed link and QR per dealer, apartment community and tax preparer [F]
- [ ] Version-numbered counter cards, partner welcome packet and enrollment agreement [F]
- [ ] Monthly partner statements with fee lines and a ready-to-return count, never scores or credit data [F]
- [ ] Separate no-fee program for LOs, realtors and attorneys [F]
- [ ] Partner outreach: ramped email, 7/21/45-day follow-ups and a LinkedIn queue [F]
- [ ] Recruiting funnel for reps and dispute processors [F]

COMMAND & CONTROL

- [ ] Daily recap and weekly funnel report [L]
- [ ] Full Monday owner's report and live dashboard [G]
- [ ] Compliance shell: address and unsubscribe on every email, the standing disclaimer, the banned-phrase list, the Georgia geo-fence [L]
- [ ] Trust Center review and a written A2P recommendation (no SMS is sold) [L]
- [ ] Monthly automation think-tank: a working session to design and build a custom automation for whatever your team still does by hand [F]

MONEY DESK

- [ ] Owner-routed onboarding: every new client gets the welcome from their own rep – the rep's name, email and own sign-up link – so the file lands in that rep's queue; one message per client, never duplicates [G]
- [ ] Secure two-step sign-up: SSN, ID, bureau logins and account numbers never by email; the welcome sends them to a secure form that files it straight into your system of record [G]
- [ ] Billing that runs itself: 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 client added in your dispute platform creates a blank draft invoice in the CRM for staff to finish and send; nothing reaches the client until a person sends it (on Growth, with the third-party integration add-on) [F]
- [ ] Commission ledger: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per rep and a 'needs attention' list [F]
- [ ] Billing reconciliation: who is billed, who paid, who is overdue and who is being missed, across the CRM, your dispute platform and any old processor [F]
- [ ] Moving your payment processor, included at no charge: every paying client 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?

- [ ] CROA: written contract, separate consumer-rights disclosure, 3-business-day cancellation (5 in California)
- [ ] No fee before the service is fully performed; no setup fee at signing
- [ ] Telemarketing Sales Rule when any part of the sale happens by phone
- [ ] State CSO registration and surety bond (e.g. California DOJ registration)
- [ ] Georgia: no enrollment of Georgia residents
- [ ] FCRA: no credit applications or bureau pulls accepted from partners
- [ ] No SMS on 10DLC or toll-free (a prohibited category)
- [ ] Meta financial Special Ad Category; no Google Ads
- [ ] Banned phrases and the standing disclaimer on every template
- [ ] Consent records and contract copies kept (2 years in California)
- [ ] RESPA Section 8 for the return referral to an LO or realtor
- [ ] Email CAN-SPAM: business address and unsubscribe

Other:

Does any part of your sale happen by phone? ☐ Yes ☐ No

Has counsel reviewed your contract, disclosures and notice of cancellation? ☐ Yes ☐ No

Do you currently enroll anyone in Georgia? ☐ Yes ☐ No

Do any partners send you credit applications or reports today? ☐ 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

- ☐ Leads by source
- ☐ Speed to first response
- ☐ Consults booked and showed
- ☐ Enrollments
- ☐ Cost per enrolled client
- ☐ Active clients
- ☐ Monthly churn / average months per client
- ☐ Declines recovered
- ☐ Cancellations saved
- ☐ Rounds sent on time
- ☐ Partner referrals and ready-to-return count
- ☐ Revenue

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.

- ☐ Dispute software admin (or API / Zapier access)
- ☐ Existing CRM export (contacts, notes, tags)
- ☐ Payment processor access for payment links and decline alerts
- ☐ Google Business Profile manager access
- ☐ Domain registrar / DNS login
- ☐ Current CROA contract, information statement and notice of cancellation
- ☐ Partner list with fee tiers and signed agreements
- ☐ Monitoring affiliate account (IdentityIQ / SmartCredit)
- ☐ Old lead list (CSV) with source and state
- ☐ Meta Business Manager + page admin
- ☐ Google Workspace / Microsoft 365 admin
- ☐ Twilio / carrier Trust Center status
- ☐ CSO registration and bond certificates for each state served
- ☐ 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
DisputeFox	disputefox.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Credit Repair Cloud	creditrepaircloud.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Client Dispute Manager	clientdisputemanager.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
IdentityIQ	identityiq.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
SmartCredit	smartcredit.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
MyScoreIQ	myscoreiq.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Zapier	zapier.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Payment processor / gateway (NMI, Authorize.net)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Twilio (Trust Center)	twilio.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Existing CRM / automation platform account (if any)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Dispute letter print and mail service		☐ 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 Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Trustpilot	trustpilot.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
BBB business profile	bbb.org	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
State CSO registration portal (e.g. California DOJ)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Drive (consent and disclosure log)	drive.google.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			