Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Dealership F&I Intake Packet

Everything we need to build your stip chase, your CIT board, your re-sign and kickback recovery, your declined-product campaign and your 7am F&I report. 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)

Dealership legal name (exactly as on the W-9)

DBA / store name

Franchise(s) / brands

Dealer license #

Dealer group (if any)

F&I director

F&I managers (#)

Title clerk / title office

Controller

Main F&I phone

Address (city, state, zip)

Qualified Individual (Safeguards Rule)

Company type

- ☐ Franchised new + used
- ☐ Independent used
- ☐ Buy-here-pay-here
- ☐ Powersports / RV / marine
- ☐ Commercial / fleet
- ☐ Multi-store group with a central F&I or title office

Other:

Products / services you actively sell

- ☐ Retail installment contracts (indirect lending)
- ☐ Leases
- ☐ VSC (vehicle service contract)
- ☐ GAP waiver
- ☐ Prepaid maintenance
- ☐ Tire and wheel
- ☐ Appearance / paint and fabric protection
- ☐ Key replacement
- ☐ Theft deterrent / etch
- ☐ Windshield protection
- ☐ Dent repair (PDR)
- ☐ Credit life / disability (where offered)
- ☐ Reinsurance / participation (DOWC, retro)

Other:

Deals through F&I per month (new + used)

Current F&I PVR

Average days in CIT (signed to funded)

12-month PVR and penetration goal

In one or two sentences, what does your F&I office do better than the store down the freeway, and what does the customer notice about it?

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 (F&I director / F&I manager / Title clerk / Funding / contracts clerk / Controller / Desk manager / GSM / Office / cashier)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐
					☐

NAME	ROLE (F&I director / F&I manager / Title clerk / Funding / contracts clerk / Controller / Deskmanager / GSM / Office / cashier)	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?

☐ F&I managers rotate (up system) ☐ Desk assigns by deal ☐ By brand / new vs. used

☐ Whoever is free ☐ Salesperson picks ☐ One F&I manager handles every deal

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) ☐ Current menu (PDF or screenshot) ☐ Approved product provider brochures ☐ OEM brand guide / co-op rules

☐ F&I manager headshots ☐ Current email signature ☐ Delivery checklist / welcome packet

Other:

Google Business Profile link

Review links (Google Business Profile / DealerRater / Cars.com / Yelp)

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. 'Dealer License #XXXXX · [store name] · This product is optional. You are not required to buy it to buy or lease this vehicle.') – paste it exactly

Paste your exact lines, including any provider or state wording you must use (California requires the "not required" line in writing)

Anything we must NEVER say in a customer message (a credit score, tier or band, "approved" or "pre-approved", a payment, term, rate or down payment, "warranty" for a VSC, "GAP insurance", that a product is required)? California stores also: a written payment quote without the total of payments, an oil-change plan offered on an EV, or anything suggesting a used-car buyer can't cancel.

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 / ?
DMS (CDK, Reynolds, Dealertrack, Tekion, PBS, Autosoft)				
Credit portal (RouteOne, Dealertrack)				
eContracting (RouteOne, Dealertrack)				
F&I menu (MenuVantage, Darwin)				
Product providers / administrators (rating, remitting, cancellations)				
Credit bureau / soft-pull (700Credit)				
Safeguards / compliance tool (ComplyAuto or similar)				
CRM (VinSolutions, eLead, DealerSocket, DriveCentric)				
Title / registration (state e-title, CVR, title service bureau)				
Lender portals (captive, bank, credit union)				
Deal jacket scanning / document storage				
Chargeback and cancellation tracking (provider portals, spreadsheets)				
Phone system / call tracking				
Customer texting tool (Podium, CRM texting)				
Reputation / reviews (Podium, Birdeye)				
Service scheduler (Xtime, myKaarma)				
Business email hosting (Google / Microsoft)				
Accounting schedules (DMS accounting, controller spreadsheets)				
Spreadsheets / shared drives (CIT log, stip log)				
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
☐ Deals from the sales desk (new)		☐ Deals from the sales desk (used)	
☐ Online credit applications (website)		☐ Digital retailing deals (Roadster, Darwin)	
☐ Third-party lead providers' credit apps		☐ Service drive (product sales to service customers)	
☐ Declined-product customers (said no in the box)		☐ Payoff / equity customers (repeat buyers)	
☐ Lease-end customers		☐ Credit union direct-lend buyers	
☐ Employer purchase programs		☐ Insurance agent referrals (binder lane)	
☐ Second-look / turndown customers returning		☐ Other:	

Credit apps → submitted %	Submitted → approved or conditioned % (look-to-book)	Signed → funded within 7 days %	VSC / GAP penetration %

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?

- ☐ Stips chased by phone from sticky notes
- ☐ Contracts sit in transit past day 7
- ☐ Kickbacks turn into a week of phone tag
- ☐ Customers who declined products are never asked again
- ☐ Cancellations miss the refund clock
- ☐ Chargebacks never tie back to the deal or producer
- ☐ Temp tags expire before title and registration are done
- ☐ Menu skipped on busy days

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: Credit App In → Submitted → Approved / Conditioned → Signed → Stips Out → Funded
Side lanes: CIT board (0-3 / 4-7 / 8-15 / 16+ days, the way most desks run it) · Kickback / Re-sign · Second Look / Turndown · Declined Product (7 / 30 / 60 / 90 days) · Cancellation Requested · 3-Day Cancel Window (California used cars at or under $50,000)

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

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

Is every deal menu-presented and signed today, and is that logged? ☐ Yes ☐ No

Are lender kickback reasons logged anywhere today? ☐ Yes ☐ No

Do you want customers the desk can't get bought to receive a credit repair partner counter card in person? ☐ 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 TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Captive lenders
- ☐ Indirect banks
- ☐ Credit unions (direct-lend and indirect)
- ☐ VSC, GAP and ancillary product providers / administrators
- ☐ Insurance agents (binders)
- ☐ Credit repair partner (second-look / turndown lane)
- ☐ Employer purchase programs
- ☐ Title service bureaus

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. Partner statements carry counts and dollars only (contracts submitted, products sold, remittance, average days to fund, kickback rate), never a customer's name, score or any deal detail beyond a deal number. The credit application and bureau pull never go to the credit repair partner; the customer self-refers from a counter card handed over in person.

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

- ☐ Proof of income (pay stubs)
- ☐ Proof of residence
- ☐ References
- ☐ Insurance binder / proof of insurance
- ☐ Driver's license
- ☐ Signed odometer statement
- ☐ Re-signed contract after a kickback
- ☐ Trade title / lien payoff letter
- ☐ Power of attorney and title signatures
- ☐ Out-of-state title and registration documents
- ☐ Product cancellation forms
- ☐ Signed menu
- ☐ Signed add-on "not required" disclosure (California)
- ☐ Signed 3-Day Right to Cancel form (California used cars)

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Review request (Google / DealerRater)
- ☐ First service appointment booked
- ☐ Declined-product follow-up (7 / 30 / 60 / 90)
- ☐ Product welcome / registration from the provider
- ☐ Thank-you from the F&I manager
- ☐ Payoff / equity check-in for repeat business
- ☐ 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?
Chasing stips after signing				☐
Pulling and reviewing the CIT report				☐
Funding follow-up calls and emails with lender reps				☐
Triaging bank kickbacks				☐
Booking re-sign appointments				☐
Tracking adverse action notices				☐
Following up customers who declined products				☐
Title, registration and temp-tag work				☐
Processing product cancellations and refunds				☐
Reconciling chargebacks against deals and producers				☐
Menu compliance audits				☐
Building the PVR and penetration report				☐
Scheduling deliveries and first service appointments				☐
Answering customer calls about payoffs, products and paperwork				☐
Lender program updates and rate sheets				☐
Reinsurance / participation statement review				☐
Paying add-on providers within 10 days of signing (California)				☐
Data entry between DMS, credit portal and spreadsheets				☐
Figuring F&I manager pay				☐
				☐
				☐

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
F&I Log / PVR Report	☐			FULL	
Product Penetration by Producer	☐			FULL	
CIT (Contracts in Transit) Aging	☐			FULL	
7am CIT Email to the Desk	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Funding Delay / Stips Outstanding	☐			ASSIST	
Kickback Reasons by Lender and Manager	☐			FULL	
Look-to-Book by Lender	☐			SEMI	
Chargeback Report by Product and Manager	☐			SEMI	
Cancellation / Refund Clock Report	☐			SEMI	
Menu Compliance Exception Report	☐			FULL	
Title and Temp-Tag Deadline Report	☐			FULL	
Declined-Product Campaign Results	☐			FULL	
Adverse Action Log Check	☐			ASSIST	
Lender Program Review	☐			ASSIST	
Reinsurance / Participation Review	☐			ASSIST	
F&I Pay Plan / Commission Inputs	☐			ASSIST	
CARS Act Compliance Report (California: add-on disclosures signed, payment quotes with totals, 10-day remittances, 3-day cancellations, deal records complete)	☐			SEMI	
	☐			--	
	☐			--	

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

Think: Daily save and CIT meeting, weekly build-a-deal meeting, monthly lender program review, quarterly reinsurance review, provider remittance, rate sheet updates, Safeguards risk assessment, F&I certification renewals.

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 dealership F&I desk: Launch covers the deal-desk pipeline with a parallel CIT board, a credit-application page with consent capture and no payment, term or rate language, an instant "we have your application" reply that is never a decision, round robin to F&I managers, calendars for re-signs and deliveries, source tagging by lender portal and salesperson, finance-free A2P registration, the never-list wired into every template, and a daily recap of deals written, funded and in CIT; Growth adds the F&I Desk Engine (stip chase, CIT board with escalation, funding follow-up, re-sign and kickback recovery, the 7/30/60/90 declined-product campaign, cancellation and refund tracker, chargeback ledger, menu compliance gate, title and tag board, delivery handoff), the after-hours assistant for booking and documents only, per-manager pages and the live dashboard; Full Engine adds the lender and product-provider partner program with statements in counts and dollars, the credit union, insurance binder, second-look and employer lanes, F&I manager recruiting, the operating-rhythm automations, written desk procedures and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE

The F&I Desk Engine

- Stip Chase Automation: a per-deal stip checklist, a secure upload link texted to the customer, re-pings at hours 4, 24, 48 and 72, and a live checklist on the manager's screen
- The CIT Board: unfunded contracts aged 0-3, 4-7, 8-15 and 16+ days, escalation to the F&I director at day 7 and the GM at day 15, and a 7am CIT email
- Funding Follow-Up Sequences: lender follow-up tasks at days 3, 7 and 10 with the deal number and outstanding item, plus a kickback-reason log
- Re-Sign and Kickback Recovery: a two-way text with a booking link, escalating reminders and an automatic re-offer on no-show
- Declined-Product Campaign: a 7/30/60/90-day sequence that references the vehicle generically, with no pricing, payment or coverage claims, stopping on reply; in California every written product mention says it is optional and not required
- Product Cancellation and Refund Tracker: intake form, provider packet assembly, a state-aware refund clock and escalation at day 20
- Chargeback Ledger: provider chargebacks posted against the originating deal and producer, with a monthly report by product and manager
- Menu Compliance Gate: the deal cannot advance without menu-presented-and-signed logged, plus a weekly exception report; in California it also checks the signed "not required" disclosure, the 3-day cancel form on eligible used deals and the current contract form
- Title and Tag Deadline Board: temp-tag countdowns, lien perfection, the out-of-state title queue and texts for missing signatures
- Delivery Handoff and First Service Booking: delivery triggers the review request and a first service booking link

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	–	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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 F&I Desk Engine	Stip Chase Automation; The CIT Board; Funding Follow-Up Sequences; Re-Sign and Kickback Recovery; Declined-Product Campaign; Product Cancellation and Refund Tracker; Chargeback Ledger; Menu Compliance Gate; Title and Tag Deadline Board; Delivery Handoff and First Service Booking	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
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. For you: F&I manager pay.	–	–	●
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	●	●
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 · 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
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

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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.

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`

DEAL DESK & SPEED

- ☐ Credit-application page with consent capture and timestamp, and no payment, term or rate language anywhere on it `[L]`
- ☐ Instant "we have your application; a named manager will call shortly" reply that is never a decision `[L]`
- ☐ Round robin of credit apps to F&I managers with a claim window `[L]`
- ☐ Calendars for F&I appointments, re-signs and deliveries, with reminders `[L]`
- ☐ Source tagging by lender portal, salesperson and campaign `[L]`
- ☐ After-hours assistant that books appointments and collects documents only; it never discusses credit, decisions, scores or numbers `[G]`

STIPS, CIT & FUNDING

- ☐ Stip chase: per-deal checklist, secure upload link, re-pings at hours 4, 24, 48 and 72 `[G]`
- ☐ CIT board aged 0-3 / 4-7 / 8-15 / 16+ days, escalation to the director at day 7 and the GM at day 15, 7am CIT email `[G]`
- ☐ Funding follow-up tasks at days 3, 7 and 10 with the deal number and the outstanding item `[G]`
- ☐ Re-sign and kickback recovery: two-way booking link, escalating reminders, re-offer on no-show `[G]`
- ☐ Kickback-reason log feeding a monthly why-we-get-kicked-back report by lender and manager `[G]`
- ☐ Internal alerts: stip aging, funding exceptions, refund clock, temp-tag expiry `[F]`

PRODUCTS & PENETRATION

- ☐ Declined-product campaign at 7/30/60/90 days: generic vehicle reference, no pricing or coverage claims, stops on reply `[G]`
- ☐ Menu compliance gate: the deal can't advance without menu-presented-and-signed, plus a weekly exception report `[G]`
- ☐ Product cancellation and refund tracker with a state-aware refund clock and day-20 escalation `[G]`
- ☐ Chargeback ledger posted against deal and producer, reported monthly by product and manager `[G]`
- ☐ Per-F&I-manager landing pages and QR cards for delivery follow-up and referrals `[G]`

TITLE, DELIVERY & REPEAT BUSINESS

- ☐ Title and tag board: temp-tag countdowns, lien perfection, out-of-state queue, texts for missing signatures `[G]`
- ☐ Delivery handoff: review request and first service booking link on delivery `[G]`
- ☐ Invoicing and payment links for deposits, aftermarket and cancellation fees `[G]`
- ☐ Owned-list re-activation for payoff and equity repeat business, generic language only `[G]`
- ☐ Post-delivery review request to Google and DealerRater `[L]`
- ☐ DMS write-back integration beyond the daily export, scoped with your DMS rep `[+]`

PARTNERS & GROWTH

- ☐ Lender and product-provider partner program with tracked links and attribution `[F]`
- ☐ Monthly partner statements in counts and dollars only: submitted, sold, remittance, days to fund, kickback rate `[F]`
- ☐ Second-look / turndown lane with your credit repair partner; the customer self-refers by counter card `[F]`
- ☐ Credit union direct-lend, insurance agent binder and employer purchase-program lanes `[F]`
- ☐ F&I manager recruiting funnel `[F]`

COMMAND & CONTROL

- ☐ Daily recap: deals written, deals funded, CIT count `[L]`
- ☐ 7am F&I report: PVR, penetration and CIT recap, built for you `[G]`
- ☐ Live dashboard for the F&I director and GM `[G]`

- ☐ Compliance shell: the never-list wired into every template (no score, tier, decision or trigger term), MFA and per-user roles, no SSN, DOB, income or bureau data in the CRM [L]
- ☐ Operating-rhythm automations: daily save and CIT meeting prep, weekly build-a-deal meeting, monthly lender review, quarterly reinsurance review [F]
- ☐ Written F&I desk procedures that double as Safeguards documentation support [F]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever the desk still does by hand [F]

CALIFORNIA CARS ACT (SB 766), FROM OCT 1, 2026

- ☐ "Not required" line: any written product mention during negotiation carries "This product is optional. You are not required to buy it to buy or lease this vehicle.", with a translation flag when the deal is negotiated in Spanish, Chinese, Tagalog, Vietnamese or Korean [L]
- ☐ Payment-quote filter: a written payment quote can't go out without the total of payments and the down payment or trade assumed; payment comparisons add "Lower monthly payments often increase the total amount you pay." [L]
- ☐ Product benefit checks per deal: no oil-change plan on an EV, no catalytic converter marking without a converter, nitrogen at 95% purity or better, GAP loan-to-value and the 4% cap checked, service contract exclusions flagged; borderline calls go to the F&I director [G]
- ☐ Provider remittance tracker: payment due 10 days from signing unless a later-payment agreement is on file, with proof of payment kept [G]
- ☐ Used cars at or under $50,000: the signed "3-Day Right to Cancel Used Car Purchase or Lease" form checked in the deal jacket, the deadline and 400-mile limit recorded, the restocking fee calculated and a 48-hour refund timer on any cancellation [G]
- ☐ Deal record checklist: purchase order, signed finance or lease documents (even if the lender never buys the contract), the signed disclosures, the GAP loan-to-value and provider payment proof, kept 2 years; contracts and credit documents 7 years [G]

MONEY DESK

- ☐ Secure two-step sign-up: credit application data never by text or email; customers complete it on a secure form that files straight into your system of record [G]
- ☐ Commission ledger for F&I manager pay: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per F&I manager and a 'needs attention' list [F]

Top pick #1 | **Top pick #2** | **Top pick #3**

Anything you want that isn't on the list

13. Compliance & Consent

F&I is regulated federally and by your state. We build the guardrails in; you tell us your rules. The system tracks, reminds and reports; the dealer and its counsel make compliance decisions. Not legal advice.

Which apply to you?

- ☐ GLBA Safeguards Rule: Qualified Individual, written risk assessment, MFA, encryption, service-provider contracts
- ☐ FTC breach notice within 30 days
- ☐ Reg B / ECOA: adverse action is a compliant, logged notice from your system of record, never a text
- ☐ Reg Z / Reg M: no payment, term, down payment, APR or finance charge in any automated message
- ☐ FCRA: nothing derived from a bureau pull goes into the marketing CRM
- ☐ TCPA prior express written consent for texts
- ☐ FTC Act Section 5 (the federal CARS Rule was vacated in 2025 and withdrawn in 2026; warning letters continue)
- ☐ California CARS Act (SB 766), from Oct 1, 2026: a written "optional, not required" line on every add-on, translated where required
- ☐ CA: no charge for an add-on the buyer can't benefit from (EV oil changes, converter marking with no converter, nitrogen under 95%, GAP outside Civ. Code 2982.12)
- ☐ CA: written payment quotes show the total of payments and the down payment or trade assumed
- ☐ CA: add-on providers paid within 10 days of signing
- ☐ CA used cars at or under $50,000: separate signed 3-day cancel form, the new first-page contract notice, refund within 48 hours
- ☐ CA: the paid 2-day contract cancellation option ended Oct 1, 2026 (Veh. Code 11713.21 repealed)
- ☐ CA: deal records kept 2 years, including deals the lender never bought
- ☐ State VSC and GAP rules: free-look windows and refund deadlines by state
- ☐ Menu presented and signed on every deal
- ☐ A2P sample messages with no finance or credit words
- ☐ Email CAN-SPAM opt-out

Other:

Has the store named a Qualified Individual and completed a written risk assessment?	☐ Yes	☐ No
Does your credit-app page capture written consent to text and call?	☐ Yes	☐ No
Are adverse action notices generated and logged outside the CRM today?	☐ Yes	☐ No
Does compliance counsel review customer-facing templates before they go live?	☐ Yes	☐ No

California stores: are the new contract forms (first-page 3-day notice) live, and is the paid 2-day contract cancellation option off the menu? ☐ Yes ☐ No

Has your counsel reviewed each menu product against the "would not benefit" rule? ☐ 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

- ☐ F&I PVR
- ☐ CIT days and count by bucket
- ☐ Menu presentation rate
- ☐ Temp tags near expiry
- ☐ VSC / GAP / ancillary penetration by producer
- ☐ Kickback rate by lender and manager
- ☐ Declined-product recovery
- ☐ First service appointments booked at delivery
- ☐ Look-to-book by lender
- ☐ Chargeback rate by product
- ☐ Cancellations and refund-clock status
- ☐ California: add-on disclosures signed and provider remittances on time

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.

- ☐ Daily DMS export of deal status (deal number, stage, funding date, products) with no SSN, DOB, income or bureau data
- ☐ Lender rep contacts and the standard stip list by lender
- ☐ Product provider list and a sample chargeback statement from each
- ☐ Current menu and your menu presentation standard
- ☐ Adverse action procedure: where notices are generated and stored today
- ☐ Legal name as on the W-9, dealer license #, EIN, address and website with privacy policy (required for business texting registration)
- ☐ Google Business Profile manager access and review links
- ☐ CRM admin login (or add us as a user)
- ☐ The kickback reasons you actually see (for the pick-list)
- ☐ Your provider agreements (chargeback periods and remittance terms) and the states you sell into (refund windows)
- ☐ Temp-tag validity period and the title workflow, including any title service bureau
- ☐ Qualified Individual's name and a signed Safeguards vendor addendum
- ☐ Tracked F&I line to port or forward
- ☐ Logo files and F&I manager headshots

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
DMS (CDK, Reynolds, Dealertrack, Tekion)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
RouteOne	routeone.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Dealertrack (credit and eContracting)	dealertrack.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Captive lender portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Bank lender portals		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Credit union lender portals		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
F&I menu (MenuVantage, Darwin)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Product provider / administrator portal (VSC, GAP)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Ancillary product provider portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
700Credit	700credit.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Safeguards / compliance tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
State DMV / e-title and registration system		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Title service bureau / CVR		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CRM (VinSolutions, eLead, DealerSocket)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Reinsurance / participation statement portal		☐ 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	
DealerRater	dealerrater.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Business email admin	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			