WHAT YOU ARE GETTING

The build, itemized.

Dealership F&I

Not a feature brochure. Every line below is something that exists and works when the four weeks are done, and that you can open in your own account and see.

Each package is cumulative. Growth includes all of Launch. Full Engine includes all of Growth. The prices are the same in every industry; what is inside them is built for dealership F&I and the desk.

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September 2026

Launch

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

BUILD FEE
$3,500
one time

MONTHLY
$697
includes the platform

DELIVERED

- **Tracked number, domain and email.** A tracked local number, your domain and professional email on your own identity, with call routing and recording.
- **Pipelines in your team's language.** CRM pipelines and stages named the way your team actually talks.
- **Lead capture with written consent.** A lead-capture page and forms that record written consent to call and text, with a privacy link, on every entry point.
- **Reply in under 60 seconds.** A reply to every new inquiry in under 60 seconds, by text and email, that stops the moment they answer.
- **Round-robin with a claim window.** Round-robin assignment with a claim window and automatic reassignment, so no lead sits with someone who is off.
- **Missed-call text-back.** Missed-call text-back with a booking link.
- **Booking calendars.** Booking calendars per person with confirmation and reminder sequences.
- **5-day follow-up drip.** A 5-day follow-up drip that stops instantly on any reply or opt-out.
- **Lead-source tagging.** Lead-source tagging at entry on every channel, so cost per sale by source is measurable from day one.
- **Review requests.** A review request at the right moment after the sale or visit, sent to everyone, never filtered by sentiment.
- **Business texting registration.** A2P 10DLC brand and campaign registration prepared with sample messages that match your consent language.
- **Compliance shell.** Consent records with timestamps, STOP and any-reasonable-means opt-outs honored across every channel and workflow, quiet hours, the required footers and identifiers, and a blocked-phrase list applied to every template.
- **Daily recap and weekly funnel report.** Daily recap and a weekly funnel report to the owner.
- **Handoff booklet and training.** A handoff booklet with screenshots of every system, and team training.

BUILT FOR DEALERSHIP F&I AND THE DESK

PIPELINE STAGES

Credit App In → Submitted → Approved / Conditioned → Signed → Stips Out → Funded → CIT (parallel board)

- **Pipeline built as the deal desk:** Credit App In, Submitted, Approved/Conditioned, Signed, Stips Out, Funded, with a parallel CIT board.
- Credit-application landing page with TCPA consent capture and timestamp, and no payment, term or rate language anywhere on it.
- The instant reply says we have your application and a named manager will call shortly. It is never a decision.
- Round-robin goes to F&I managers; calendars cover F&I appointments, re-signs and deliveries.
- Source tagging is which lender portal, which salesperson, which campaign.
- A2P 10DLC registration for the finance line, with sample messages free of finance words.
- Compliance shell wires the never-list into templates as hard guardrails: no score, no tier, no decision, no Reg Z triggering term.
- Daily recap is deals written, deals funded and CIT count.

Growth

Everything in Launch, plus onboarding, retention, database re-activation, the full Monday report and your industry engine. The package most businesses land on.

BUILD FEE	MONTHLY
$6,500	$1,197
one time	includes the platform

DELIVERED — EVERYTHING IN LAUNCH, PLUS

- **Branded email templates.** Branded email templates with your identifiers locked in.
- **Client onboarding.** Client onboarding on “Sold”: welcome, what-happens-next, document request with secure upload links, e-sign, payment link. Never asks for sensitive data by email reply.
- **Invoicing and payment links.** Invoicing and payment links with reminders until paid.
- **Document and signature chase.** Document and signature chase with a live staff checklist showing who owes what and how long it has been outstanding.
- **Long-term nurture.** Long-term nurture sized to your buying cycle, kept separate from the 5-day drip, with a re-engagement detector that moves anyone who responds back to the front of the pipeline with an alert.
- **Owned-list re-activation.** Owned-list re-activation: a ramped, bounce-guarded campaign against every old lead and past customer you already paid for.
- **Retention program.** A retention program for existing customers: anniversaries, check-ins, renewals, and the save flow when someone tries to leave.
- **Per-rep pages and QR cards.** Per-rep landing pages and QR cards, each feeding the same pipeline with attribution to the rep.
- **After-hours AI assistant.** An after-hours AI assistant that answers, qualifies and books, fenced by your industry’s never-list.
- **Full weekly owner’s report.** The full weekly owner’s report, written as what the business accomplished, never a task log.
- **Live dashboard and command center.** A live dashboard and an owner’s command center: one screen instead of four logins, showing this week’s recurring tasks with tick-off, a green, amber or red light on every system, the documents and logins in one place, and a fix-it runbook for when something breaks.
- Invoicing and payment links cover deposits, aftermarket and cancellation fees.
- Owned-list re-activation is for equity and payoff-driven repeat business, generic language only, no payment, term or rate.
- Per-F&I-manager landing pages and QR cards serve delivery follow-up and referrals.
- The after-hours AI assistant books appointments and collects documents only. It may never discuss credit, decisions, scores or numbers.
- Long-term nurture on declined products runs 90 days, then the record joins the store’s owned-list cadence.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The F&I Desk Engine

Stips, CIT, kickbacks and the penetration gap, with counts and dollars never people

Stip Chase Automation

A per-deal stip checklist (pay stubs, proof of residence, references, insurance binder, driver's license, signed odometer statement) with a secure upload link texted to the customer, automatic re-pings at hours 4, 24, 48 and 72, and a live checklist on the F&I manager's screen showing who owes what on every open deal.

The CIT Board

Every unfunded contract aged in buckets the way most desks run it: 0-3, 4-7, 8-15 and 16-plus days, with automatic escalation to the F&I director at day 7 and the GM at day 15, plus a 7am CIT email to the desk. It replaces the DMS report nobody pulls.

Funding Follow-Up Sequences

Lender follow-up tasks at days 3, 7 and 10 with the deal number and the specific outstanding item, plus a running kickback-reason log that feeds a monthly why-we-get-kicked-back report by lender and by F&I manager.

Re-Sign and Kickback Recovery

When a contract comes back, the customer gets a two-way text with a booking link for a re-sign appointment, escalating reminders, and an automatic re-offer on no-show. A bank kickback becomes a calendar entry instead of a week of phone tag.

Declined-Product Campaign

Every delivered customer who said no in the box enters a compliant 7/30/60/90-day sequence that references their vehicle generically and offers a conversation with F&I. No pricing, no payment, no coverage claims, stops on reply. This is the penetration-gap recovery engine.

Product Cancellation and Refund Tracker

Intake form, provider-specific packet assembly, a state-aware statutory refund clock, escalation at day 20, and a customer-facing status update, so a cancellation never becomes a statutory violation or a complaint.

Chargeback Ledger

Provider chargeback statements land in one place, post against the originating deal and producer, and roll into a monthly chargeback-by-product and by-F&I-manager report the director can take into a pay-plan conversation.

Menu Compliance Gate

The deal cannot advance without menu-presented-and-signed logged, 100% of customers, 100% of deals, plus a weekly exception report naming the deals that skipped it. This is the compliance artifact that makes the rest defensible.

Title and Tag Deadline Board

Temp-tag expiry countdowns, lien perfection tracking, an out-of-state title queue, and automatic customer texts for missing signatures or documents. The DMV work stays human; the deadline tracking does not.

Delivery Handoff and First Service Booking

Delivery triggers the review request and a first service-appointment booking link. Only about a quarter of buyers currently leave with a first appointment booked.

Full Engine

Everything in Growth, plus the referral-partner program, full operations, and a monthly think-tank that keeps finding the next thing to take off your team's plate.

BUILD FEE
$9,500
one time

MONTHLY
$1,697
includes the platform

DELIVERED — EVERYTHING IN GROWTH, PLUS

- **Referral partner program.** A referral partner program with a tracked link and printed QR card per partner and automatic attribution written at lead creation.
- **Printable partner materials.** Printable partner materials: welcome packet, counter cards, one-pagers, version-numbered.
- **Monthly partner statements.** Automated monthly partner statements, with contents set by what the law allows in your industry. Where a threshold decides what appears on a statement, the system records the decision and never the figure behind it, so the sheet stays safe to share with staff.
- **Partner outreach campaign.** A partner outreach campaign to build the bench, with a no-fee copy variant wherever a fee is illegal.
- **Partner lanes.** Partner lanes: a separate pipeline and cadence per partner type.
- **Operating-rhythm automations.** Every operating-rhythm automation from the intake: huddle prep, daily lists, weekly reviews, monthly reports.
- **Internal task and alert flows.** Internal task and alert flows: unclaimed lead, stalled file, deadline at risk, negative review, manager escalation.
- **Written procedures.** Written procedures for the team's own operations.
- **Priority support.** Priority support: a named contact, a weekly twenty-minute call, same-day changes.
- **Monthly business report.** Monthly business report in addition to the weekly.
- **Handoff booklet, kept current.** The handoff booklet, kept current as the system changes.
- **Monthly automation think-tank.** A standing session every month where we sit down with you and your team, find the daily tasks eating their time, and design and build custom automations for them.

THE PART NOBODY ELSE SELLS

Monthly automation think-tank

A standing session every month where we sit down with you and your team, find the daily tasks that are eating their time, and design and build custom automations for them. Every build is documented and added to your handoff booklet. It is the reason Full Engine clients stay for years: the system keeps getting better instead of slowly going stale.

FULL ENGINE, BUILT FOR DEALERSHIP F&I AND THE DESK

Partners, lanes and rhythm in your business.

- Lender and product-provider partner program with tracked links and attribution.
- Monthly partner statements carry volume, dollars and turnaround metrics: contracts submitted, VSCs sold, total remittance, average days to fund, kickback rate. Counts and dollars only, never people. No consumer name, no score, no decision, no deal detail beyond a deal number.
- **Named partner lanes:** the credit union direct-lend lane, the insurance agent binder lane (a real, underused two-way referral), the second-look and turndown lane with a credit repair partner (the customer self-refers by counter card, the CRO never receives the credit application or the bureau pull), and the employer purchase-program lane.
- **Recruiting funnel:** yes, for F&I managers, the hardest seat in the building to fill at roughly $98,000 average.
- **Operating-rhythm automations:** daily save and CIT meeting prep, weekly build-a-deal meeting, monthly lender program review, quarterly reinsurance review.
- **Internal alerts:** stip aging, funding exceptions, refund clock, temp-tag expiry.
- Written procedures double as the F&I desk SOP and Safeguards Rule documentation support.

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for dealership F&I and the desk.
- Each monthly fee includes a **$197 platform licence** for your white-labeled workspace. One bill, no separate software vendor. If you already own your own HighLevel account, take $197 off the monthly and we build in yours.
- **Ad spend and carrier messaging fees are billed at cost.** We don't mark them up.
- The **build fee is half at signature, half on delivery.**
- **Month to month after the first 90 days.** No long contract.
- **Add-ons bought with the build are 15% less** than the same add-on later.
- **Regulated industries get a compliance review in week one at no charge.** Every template goes to your compliance officer or counsel before it goes live. We build the system and the evidence file; we do not give legal advice.
- **You own everything** — accounts, data, scripts and documents. Your contacts, pipelines, templates and documents export at any time, and the domain and sheets are registered in your name.

What we ask of you

About two hours for intake in week one, a thirty-minute review each week during the build, and one hour at handoff. After that, the only thing the system needs from your team is that they answer the leads it hands them. That one is not optional, and it is the single biggest difference between clients who get results and clients who don't.

Proof

Snap Credit Fix, a California credit repair company in one of the most regulated categories there is, runs on a system I built for them: leads answered in under a minute and assigned round-robin, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with printed QR counter cards and automated monthly statements, and a Monday report the president reads first. If it passes there, it passes in yours.