Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Dealership Intake Packet

For the General Manager. Everything we need to build your store's lead engine, BDC follow-up, unsold and be-back recovery, service-to-sales, retention and Monday report -- the same system running at Snap Credit Fix today.

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.

The finance office and the desk have their own packet (F&I + Desk). This one is the store view.

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.**

DEALERSHIP

YOUR NAME / TITLE

DATE

EVERBORN CONTACT

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1. Store Basics

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

DBA / store name

Main phone

Main email

Website

Office address (city, state, zip)

Franchise(s) / brands

Dealer license #

Year opened

Dealer group (if any)

Number of rooftops

Total employees

Store type

- ☐ Franchised new + used
- ☐ Independent used
- ☐ Buy-here-pay-here
- ☐ Powersports / RV / marine
- ☐ Commercial / fleet
- ☐ Part of a multi-store group

Other:

Departments in the building

- ☐ New sales
- ☐ Used sales
- ☐ F&I
- ☐ BDC / internet
- ☐ Service
- ☐ Parts
- ☐ Body shop
- ☐ Detail / recon
- ☐ Wholesale
- ☐ Rental / loaner

Other:

New units / month

Used units / month

Avg front gross

Avg back gross (PVR)

Service ROs / month

Sales staff (#)

BDC agents (#)

12-month unit goal

In one or two sentences, why does a customer buy from this store instead of the one down the freeway? And what is the biggest constraint to hitting your unit goal?

2. Leadership & Team

Everyone who owns a number. We use this for users, round-robin, escalations, and who gets which report.

NAME	ROLE (GM / GSM / Desk / F&I / BDC / Internet mgr / Sales)	EMAIL	CELL	IN ROUND ROBIN?
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

Dealer principal / owner (name, email)

BDC hours of coverage (in-house or outsourced?)

Up rotation / round-robin order

Claim window you would accept (minutes)

How are internet leads assigned today?

- ☐ BDC works them all
- ☐ Round robin to salespeople
- ☐ Whoever grabs it
- ☐ Internet manager assigns
- ☐ By brand (new / used)
- ☐ Salesperson's own leads only

Other:

Do you have a BDC? ☐ Yes ☐ No

Are you actively hiring salespeople, BDC agents, or techs? ☐ Yes ☐ No

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

3. Brand, Voice & OEM Rules

So every text, email, page, and printout sounds like your store and stays inside the manufacturer's brand standards.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

- ☐ Logo (PNG/SVG, light + dark)
- ☐ Manager headshots
- ☐ Store photos / video
- ☐ Current email signature
- ☐ OEM brand guide / co-op rules
- ☐ Existing landing pages
- ☐ Current flyers / mailers
- ☐ Review links

Other:

Google Business Profile link

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

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

- ☐ Friendly & local
- ☐ Professional / brand-standard
- ☐ High-energy sales
- ☐ Helpful / no-pressure
- ☐ Bilingual (specify)

Other:

Does the OEM require pre-approval of marketing or restrict texting / email templates? ☐ Yes ☐ No

Required disclosure line(s) for all marketing (e.g. 'dealer license #, doc fee language, 'plus tax, title, license', OEM legal') – paste it exactly

Anything we must NEVER say or promise (payment claims, 'guaranteed approval', 'everyone approved', price claims, etc.)

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, other)				
CRM (VinSolutions, DealerSocket, eLead, DriveCentric, other)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Website provider (Dealer.com, DealerOn, other)				
Inventory / pricing (vAuto, HomeNet, LotLinx, other)				
Digital retailing (Roadster, Gubagoo, Darwin, other)				
Chat / texting tool (Podium, Gubagoo, Kenect, other)				
Phone system / call tracking (CallRevu, other)				
Lead providers (Autotrader, Cars.com, CarGurus, other)				
OEM lead / dealer portal				
Credit app / soft-pull tool (700Credit, other)				
Equity mining / trade-cycle (AutoAlert, Mastermind, other)				
Service scheduler (Xtime, myKaarma, other)				
Reputation / reviews (Podium, Birdeye, Widewail, other)				
Email / mail marketing vendor				
Facebook / Instagram ads account				
Google Ads account (and agency, if any)				
Facebook Marketplace / social posting tool				
Business email hosting (Google / Microsoft)				
Domain registrar & DNS				
Spreadsheets / shared drives				
Other				

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

Do you already have a GoHighLevel account?

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

5. Where Customers Come From Today

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

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Internet leads (website)		☐ Third-party leads (Autotrader, Cars.com, CarGurus)	
☐ OEM leads		☐ Phone-ups	
☐ Walk-ins / lot traffic		☐ Service drive	
☐ Repeat / referral customers		☐ Credit applications online	
☐ Facebook Marketplace / social		☐ Facebook / Instagram ads	
☐ Google Ads / SEO		☐ Equity mining / lease-end	
☐ Credit repair / partner referrals		☐ Events / community	
☐ Other:			

Total leads + ups / month	Appointment set %	Show %	Sold %

Cost per lead (third-party)	Cost per sold unit (marketing)	Monthly ad + lead spend	Best-performing source

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

What happens to a lead that doesn't answer? How many attempts, over how many days, by whom, and when does it get marked dead?

What happens to an unsold showroom customer (came in, didn't buy)? Who follows up, and for how long?

What happens to a customer the desk can't get bought today? Do they ever hear from the store again?

Which of these leak the most business today?

- ☐ Slow response to internet leads
- ☐ No follow-up after 2-3 tries
- ☐ Unsold showroom traffic never worked
- ☐ Not-approved-today customers disappear
- ☐ Service customers never sold a car
- ☐ Lease-end / equity customers missed
- ☐ Sold customers never hear from us
- ☐ Leads live in a salesperson's phone
- ☐ Bad reviews unanswered
- ☐ Phone-ups mishandled

Other:

6. Sales Pipeline & Customer Journey

We build the pipeline the way your store actually works. Edit the stages or write your own; tell us what should happen automatically at each one.

Suggested stages: New Lead → Contacted → Appt Set → Confirmed → Shown → Written → Sold → Unsold / Nurture
Side lanes: Unsold Showroom · Be-Back · Not Approved Today · Waiting on Trade / Co-signer · Lost / Bought Elsewhere · Orphaned Owner (salesperson gone)

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

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

Unsold cadence you run today (days)	Lease maturity list source	Month you first touch the sold base for a trade

Do customers get appointment confirmations and reminders automatically today?	☐ Yes	☐ No
Do managers get alerted when a lead sits unanswered or an appointment no-shows?	☐ Yes	☐ No
Do you want a Not-Approved-Today lane: the salesperson hands a partner counter card in person, and the customer stays in a long nurture so they come back to this store when ready?	☐ Yes	☐ No

Do you want service customers with equity or an upcoming lease end flagged to the sales desk automatically? ☐ Yes ☐ No

7. Partners & Community

Credit repair, insurance, employers, credit unions, community groups. Usually the least tracked and the cheapest traffic.

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

Partner types

- ☐ Credit repair companies
- ☐ Insurance agents
- ☐ Credit unions / local lenders
- ☐ Employers / HR (employee pricing)
- ☐ Rideshare / gig programs
- ☐ Military / first-responder groups
- ☐ Schools / sports teams
- ☐ Rental / fleet accounts
- ☐ Body shops / independents
- ☐ Other dealers (wholesale / referrals)

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.** Bird-dog payments are regulated state by state, and in some states a contingent payment can make the underlying sale unenforceable. What IS allowed by default, and what we build: non-cash, non-contingent recognition (co-marketing, partner-branded materials, priority service scheduling, a donation in the partner's name) and monthly partner statements showing referrals, appointments and deliveries. Where your state permits cash fees, they are paid under your own written program, reviewed by your counsel, capped, on a 1099, and never to the buyer of the referred deal.

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

Who owns partner relationships?

Are you enrolled in a credit repair partner program today? ☐ Yes ☐ No

Has your counsel reviewed bird-dog compensation for your state? ☐ Yes ☐ No

8. After the Sale -- Retention & Service-to-Sales

Items you chase most often after the deal is written

- ☐ Pay stubs
- ☐ Proof of residence
- ☐ References
- ☐ Proof of insurance / binder
- ☐ Driver's license
- ☐ Signed odometer statement
- ☐ Trade title / payoff letter
- ☐ Missing title / registration signatures

Other:

How are stips collected today?

Who chases missing stips?

Who owns the post-delivery follow-up?

What happens after delivery today?

- ☐ CSI survey push
- ☐ Review request
- ☐ Thank-you from GM
- ☐ First-service appointment set
- ☐ Trade-cycle / equity outreach
- ☐ Lease-end outreach
- ☐ Birthday / anniversary
- ☐ Referral ask
- ☐ Newsletter / specials
- ☐ Nothing consistent

Sold customers in the DMS (#)

Last time they all heard from you

% of sales from repeat / referral

Service customers who did NOT buy here (#)	Who works the service drive for sales?	Leases maturing in next 12 mo (#)

Describe your dream owner program in one paragraph. What would make a customer buy their next three cars here and send their family?

9. Monthly Time Audit

Where the managers' 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?
Working / re-working internet leads				☐
Following up unsold showroom traffic				☐
Confirming appointments and chasing no-shows				☐
Answering the same customer questions (availability, hours)				☐
Chasing CSI surveys				☐
Reading and responding to reviews				☐
Posting inventory to Facebook Marketplace / social				☐
Building specials, flyers, and email blasts				☐
Equity-mining / lease-end call lists				☐
Service-drive sales prospecting				☐
Calling not-approved-today customers back				☐
Reports for the dealer principal / OEM				☐
Data entry between CRM, DMS, and spreadsheets				☐
Partner / community outreach				☐
Recruiting and onboarding staff				☐
Manager save-a-deal and T.O. follow-ups				☐
Delivery follow-up calls				☐
Scheduling appointments back and forth				☐
Database cleanup / duplicates				☐
Figuring pay plans and spiffs				☐
				☐
				☐

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

If your managers got 40 hours a month back, where would you point them?

If this were running perfectly 90 days from now, what would be different? (Units, gross, CSI, feelings, what you'd stop doing.)

10. Your Operating Rhythm -- reports and recurring tasks

Tick the reports the GM and managers actually run or receive, 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
DOC (Daily Operating Control)	☐			ASSIST	
Sales Log / Deal Log	☐			ASSIST	
Showroom Traffic / Ups Log	☐			SEMI	
Appointment Report (set / confirmed / shown, by rep and source)	☐			FULL	
Internet Lead Report / Lead Response Time	☐			FULL	
Lead Source ROI / Cost per Sale by Source	☐			FULL	
CRM Task Compliance / Activity Report	☐			SEMI	
Unsold Follow-up / Desk Log Report	☐			SEMI	
Missed Opportunity / Phone Report	☐			FULL	
Inventory Aging / Days Supply	☐			ASSIST	
Price-to-Market / Market Days Supply	☐			ASSIST	
Recon / Time-to-Line Report	☐			ASSIST	
Website / SRP-VDP Analytics	☐			ASSIST	
Ad Performance (Google / Meta)	☐			SEMI	
F&I Log / Product Penetration / PVR Report	☐			ASSIST	
CIT (Contracts in Transit) Report	☐			ASSIST	
Funding Delay / Stips Outstanding	☐			ASSIST	
Chargeback Report	☐			ASSIST	
CSI / SSI Report	☐			ASSIST	
Reputation Report	☐			SEMI	
RDR / Retail Delivery Reporting Status	☐			ASSIST	
OEM Incentive / Co-op Claims	☐			ASSIST	
Lease Maturity Report	☐			SEMI	
Equity / Trade-Cycle Report	☐			SEMI	
Floor Plan Aging / Curtailment	☐			ASSIST	
Service Department Report (ROs, hours / RO)	☐			ASSIST	
Commission / Pay Plan inputs	☐			SEMI	
Forecast / Month Plan draft	☐			SEMI	
Monthly Financial Statement (to OEM)	☐			ASSIST	
20-Group Composite	☐			ASSIST	
Recruiting Report	☐			SEMI	
Compliance Log (consent %, DNC, opt-outs)	☐			FULL	
	☐			--	
	☐			--	

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

Think: morning meeting prep, OEM portal check-ins, floor-plan audits, incentive claims, 20-group composite, payroll inputs, vendor invoices, inventory pricing, recruiting, community events.

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 logins and portals your team touches every day go on the **Logins & Portals** 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: Launch covers the never-sleeps BDC layer – every internet lead answered in under 60 seconds including nights and Sundays, round-robin with a claim window, missed-call text-back, appointment booking and reminders, the post-delivery review request, and the daily recap and weekly funnel report by source; Growth adds The Variable Ops Engine – the 30-day unsold board, be-back recovery, equity sweeps, the lease maturity board, service-to-sales, the Not-Approved-Today lane and the after-hours assistant – plus per-rep pages and the full GM report; Full Engine adds the partner program with monthly statements (credit unions, insurance agents, body shops, employers and fleet), partner outreach, salesperson and BDC recruiting, and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE

The Variable Ops Engine

- The Unsold Board: every unsold up worked for 30 days on the close-rate curve, vehicle and appointment language only
- Be-Back Recovery: a manager-visible sequence with a save-a-deal task on the desk
- Equity Mining Sweeps of the sold base on the trade cycle, first touch at month 30, no payment or term language
- The Lease Maturity Board: 90 / 60 / 30-day pull-ahead sequence
- Service-to-Sales Conquest: RO events fire a trade-appraisal offer and a walk-to-the-desk task
- Owned-List Re-Activation of orphan owners and prior customers in the DMS
- Appointment Show-Rate Stack: confirm, reminder, day-of and no-show recovery
- The Owner's Report by Source: ups, set, shown, sold and cost per sale by lead source
- The Not-Approved-Today Lane: a partner counter card handed in person; no message ever references a decision or a score
- After-Hours Coverage for the 7-10pm and Saturday-morning lead peaks, fenced from payment, credit and approval language

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

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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 Variable Ops Engine	The Unsold Board; Be-Back Recovery; Equity Mining Sweeps of the sold base on the trade cycle, first touch at month 30, no payment or term language; The Lease Maturity Board; Service-to-Sales Conquest; Owned-List Re-Activation of orphan owners and prior customers in the DMS; Appointment Show-Rate Stack; The Owner's Report by Source; The Not-Approved-Today Lane; After-Hours Coverage for the 7-10pm and Saturday-morning lead peaks, fenced from payment, credit and approval language	–	●	●
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.	–	●	●
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: store-wide pay plans.	–	–	●
PARTNERS & GROWTH				
Referral partner program	Tracked link and printed QR card per partner; attribution written automatically at lead creation	add-on	add-on	●
Printable partner materials	Welcome packet, counter cards, one-pagers, version-numbered	–	–	●
Monthly partner statements	Sent automatically; what a statement may contain is set by the law in your industry	add-on	add-on	●
Partner outreach campaign	A campaign to add partners in your territory, tracked in a partner pipeline, with a no-fee version wherever a fee is illegal	add-on	add-on	●
Partner lanes	A separate pipeline and cadence per partner type	–	add-on	●
Recruiting funnel	Landing page, application, drip, interview booking; who it recruits is set for your industry	–	–	●
COMMAND & CONTROL				
Daily recap	End-of-day summary: leads, response times, appointments	●	●	●
Monday owner's report	Launch: the weekly funnel report. Growth and up: the full owner's report, written as what the business accomplished	○ lite	●	●
Live dashboard	One screen for the owner and managers instead of four logins	add-on	●	●
Operating-rhythm automations	The daily / weekly / monthly reports and tasks you mark in section 10	–	–	●
Internal task and alert flows	Unclaimed lead, stalled file, deadline at risk, negative review, manager escalation	–	–	●
Written procedures	Your team's own operations written down	–	–	●
Monthly business report	In addition to the weekly report	add-on	add-on	●
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 licence for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already own your own HighLevel account. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. Add-ons bought with the build are 15% less than added later. Regulated industries get a compliance review in week one at no charge. You own everything: accounts, data, scripts, documents.

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
☐	Payment processor migration	$900	Paying clients moved to new payment links or card-on-file; old invoices cancelled only after payment clears
☐	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
☐	Additional campaign management	$400 / mo	
☐	Partner channel management	$600 / mo	
☐	Deliverability & compliance monitoring	$300 / mo	

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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 the Store's 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

SPEED TO LEAD & BDC

- ☐ Instant text + email to every internet lead in under 60 seconds, nights and weekends, under your store's brand [L]
- ☐ Round-robin to BDC / salespeople with 'claim it in 5 minutes or it moves on' and a manager alert on unclaimed leads [L]
- ☐ Missed-call text-back on the main line and every sales line; phone-up capture into the CRM [L]
- ☐ Online appointment booking synced to the floor schedule; confirmations and reminders [L]
- ☐ No-show recovery and show rate reported by rep and by source [G]
- ☐ After-hours AI assistant that answers availability and hours and books the appointment, fenced from payment, credit and approval language [G]
- ☐ Lead-source tagging so you know what Autotrader, Cars.com and your ads produce in sold units [L]

FOLLOW-UP THAT NEVER FORGETS

- ☐ 5-day 'we tried to reach you' drip that stops the moment they reply [L]
- ☐ Unsold Board: every unsold up worked 30 days on the close-rate curve, stop on reply [G]
- ☐ Be-back recovery with a save-a-deal task on the desk [G]
- ☐ Not-Approved-Today lane: partner counter card handed in person, long nurture so they come back to this store [G]
- ☐ Waiting-on-trade / co-signer / down-payment sequences with a booking link [G]
- ☐ Long-term 36-48 month nurture anchored to the trade cycle, with re-engagement alerts [G]
- ☐ Orphaned-owner reassignment when a salesperson leaves [G]

SERVICE-TO-SALES & RETENTION

- ☐ Equity / lease-end alerts to the desk when a qualifying customer books service [G]
- ☐ Post-delivery sequence: thank-you, review request, first-service booking [G]
- ☐ Equity sweeps of the sold base on the trade cycle, first touch at month 30 [G]
- ☐ Lease maturity pull-ahead sequence at 90 / 60 / 30 days [G]
- ☐ 'We'll appraise your car' offer to service customers who didn't buy here [G]
- ☐ Re-activation campaign across the whole sold and unsold database (ramped, bounce-guarded, auto-unsubscribe) [G]

INVENTORY & LOCAL PRESENCE

- ☐ Automatic Facebook Marketplace / social posting from the inventory feed (third-party integration) [+]
- ☐ Just-arrived alerts to matched prospects [+]
- ☐ Weekly specials email built from inventory data and sent for you (content production) [+]
- ☐ Per-salesperson landing pages and QR cards with automatic credit [G]

PARTNERS & GROWTH

- ☐ Partner-tagged links + printable QR cards (credit unions, insurance, body shops, employers) so every referral is credited [F]
- ☐ Monthly partner statement showing referrals, appointments and deliveries [F]
- ☐ Employer / fleet outreach campaign (email + LinkedIn) in your PMA [F]
- ☐ Recruiting funnel for salespeople and BDC agents: landing page, application, drip, interview booking [F]

COMMAND & CONTROL

- ☐ Daily recap to the GM and weekly funnel report by source [L]
- ☐ Monday GM report: leads by source, response times, set / show / sold, unsold follow-up, reviews, what got built [G]
- ☐ Live dashboard for the GM and dealer principal [G]
- ☐ Compliance shell: dealer license and disclosure lines on every template, opt-out handling, consent capture on every form [L]
- ☐ Handoff booklet documenting every automation so nothing depends on one manager's memory [L]
- ☐ Monthly automation think-tank: a working session with us to design and build a custom automation for whatever the store still does by hand [F]

MONEY DESK

- ☐ Owner-routed onboarding: every new customer gets the welcome from their own salesperson – the salesperson's name, email and own sign-up link – so the file lands in that salesperson's queue; one message per customer, never duplicates [G]
- ☐ Commission ledger for store-wide pay plans: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per salesperson 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

Dealer marketing is regulated by the FTC, the state, and the OEM. We build the guardrails in; you tell us your rules.

Which apply to you?

- ☐ TCPA texting consent required
- ☐ Do-Not-Call scrub
- ☐ FTC Act Section 5 advertising rules (price / availability)
- ☐ State dealer advertising rules (license #, doc fee, 'plus fees')
- ☐ OEM brand standards / co-op pre-approval
- ☐ ECOA / fair lending (no 'everyone approved')
- ☐ Reg Z / Reg M trigger terms on payment ads
- ☐ GLBA Safeguards Rule (customer data, MFA, roles)
- ☐ Recorded-call disclosure
- ☐ Email CAN-SPAM opt-out
- ☐ Business texting registration (no finance words in sample messages)

Other:

Is the team currently allowed to text customers, and from what numbers?	☐ Yes	☐ No
Do your web forms and credit apps capture written consent to text and call?	☐ Yes	☐ No
Does anyone (dealer principal, OEM, attorney) review marketing before it goes out?	☐ Yes	☐ No
Are MFA and per-user roles enabled on your CRM?	☐ Yes	☐ No

Compliance officer / attorney (name, email) | **Turnaround needed for approvals** | **Qualified Individual (Safeguards Rule) name**

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
- ☐ Appointments set / shown / sold
- ☐ Unsold follow-up contact rate
- ☐ Units & gross
- ☐ Not-approved-today customers who came back
- ☐ Service-to-sales conversions
- ☐ CSI / reviews
- ☐ Cost per sold unit by source
- ☐ BDC agent performance
- ☐ Salesperson performance
- ☐ Partner referrals

Other:

How do you want us to communicate during the build?

☐ Text ☐ Email ☐ Weekly call ☐ Shared doc ☐ In person

15. Access Checklist

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

- ☐ CRM admin login (or add us as a user) and lead-routing settings
- ☐ Third-party lead provider ADF/XML email addresses
- ☐ DMS export of sold and service customers (CSV)
- ☐ Google Business Profile manager access
- ☐ Business email hosting admin (for branded email + calendars)
- ☐ Logo files, headshots, OEM brand guide
- ☐ Existing phone numbers to port or forward
- ☐ Website provider login / form and chat lead routing
- ☐ Inventory feed (CSV / FTP / API)
- ☐ Facebook Business Manager + page admin
- ☐ Google Ads / other ad accounts
- ☐ Domain registrar / DNS login
- ☐ Dealer license #, EIN, legal address, and website with privacy policy (required for business texting registration)
- ☐ Review-site links

Anything else we should know before we start?

Logins & Portals

The systems we will need to reach during the build. Fill in what you can; leave a row blank if you'd rather share it live on the intake call. Where a system lets you add us as a user, do that instead of sharing your own password.

PORTAL	WEB ADDRESS	USERNAME	PASSWORD	2FA / WHO GETS THE CODE
CRM (VinSolutions, eLead, DealerSocket, DriveCentric)				
DMS (export access only)				
Website provider				
Inventory / pricing tool				
OEM dealer / lead portal				
Autotrader dealer portal				
Cars.com dealer portal				
CarGurus dealer portal				
Chat / texting tool				
Phone system / call tracking				
Service scheduler				
Reputation / reviews tool				
Google Business Profile	business.google.com			
DealerRater	dealerrater.com			
Facebook Business Manager	business.facebook.com			
Google Ads	ads.google.com			
Business email admin (Google or Microsoft)	admin.google.com / admin.microsoft.(			
Domain registrar & DNS				

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

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			