CLIENT INTAKE PACKET · FILLABLE

Dealership Sales Intake Packet

Everything we need to build your 60-second first touch, your unsold and be-back follow-up, your equity and lease-maturity sweeps, and your weekly report by lead source. 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 #

Rooftops (#) and dealer group, if any

Main sales phone

Address (city, state, zip)

GM / GSM / BDC manager / internet sales manager

Sales hours (weekdays / Saturday / Sunday)

BDC hours of coverage (in-house or outsourced)

Company type

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

Other:

Products / services you actively sell

- ☐ New vehicles
- ☐ Used vehicles
- ☐ Certified pre-owned (CPO)
- ☐ Leases
- ☐ Trade-ins / we-buy-your-car
- ☐ Wholesale
- ☐ Fleet / commercial
- ☐ Factory orders
- ☐ Loaner / rental sales
- ☐ Accessories
- ☐ Service drive traffic (service-to-sales)

Other:

New + used units retailed per month

Average front gross per unit

Average days from lead to sold

12-month unit goal

In one or two sentences, why does a customer buy from this store instead of the one down the freeway?

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 (GM / GSM / Sales manager / desk / Internet sales manager / BDC manager / BDC agent / Salesperson)	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?

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

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)
- ☐ OEM brand guide / co-op rules
- ☐ Manager and salesperson headshots
- ☐ Store photos / video
- ☐ Current email signature
- ☐ Existing landing pages
- ☐ Current flyers / mailers
- ☐ Walkaround / delivery videos

Other:

Google Business Profile link

Review links (Google Business Profile / DealerRater / Cars.com / Yelp / 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. 'Dealer License #XXXXX · Total price $XX,XXX plus government fees and taxes, any finance charges, any dealer document processing charge, any electronic filing charge and any emission testing charge · [OEM legal line]') – paste it exactly

Paste your exact advertising lines; in California, whether the doc fee sits inside the total price is a decision for your counsel

Anything we must NEVER say or promise in an automated message (a payment, "$0 down", a term or APR, "approved", "pre-approved" or "everyone approved", anything about credit, a firm trade value)? California stores also: a vehicle price lower than its total price (rebates or conditional discounts taken off), an add-on described as required, any government or military endorsement, 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)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
CRM (VinSolutions, eLead, DealerSocket, DriveCentric, Reynolds FOCUS)				
Website provider (Dealer.com, DealerOn, Dealer Inspire)				
Inventory / pricing (vAuto, HomeNet)				
Digital retailing (Roadster, Gubagoo, Darwin)				
Chat / texting (Podium, Gubagoo, CarNow)				
Phone system / call tracking (CallRevu, Car Wars)				
Third-party lead providers (Autotrader, Cars.com, CarGurus, TrueCar)				
OEM lead feed / dealer portal				
Credit app / soft-pull tool (700Credit)				
Equity mining / trade-cycle (AutoAlert, Mastermind)				
Service scheduler (Xtime, myKaarma)				
Reputation / reviews (Podium, Birdeye, Widewail)				
Email / direct-mail vendor				
Facebook / Instagram ads account (and Marketplace)				
Google Ads account (and agency, if any)				
Business email hosting (Google / Microsoft)				
Domain registrar & DNS				
Spreadsheets / shared drives (unsold log, save-a-deal list)				
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
☐ Website leads (forms, chat, digital retailing)		☐ Third-party leads (Autotrader, Cars.com, CarGurus, TrueCar)	
☐ OEM leads		☐ Phone ups	
☐ Walk-ins / lot ups		☐ Service drive	
☐ Repeat / referral customers		☐ Online credit applications	
☐ Facebook Marketplace / social		☐ Facebook / Instagram ads	
☐ Google Ads / SEO		☐ Equity mining / lease maturity	
☐ Be-backs		☐ Partner referrals (credit unions, insurance agents, body shops, employers)	
☐ Events / community		☐ Other:	

Lead → appointment set %	Appointment set → shown %	Shown → sold %	Cost per sold unit by source (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 response to internet leads, nights and weekends
- ☐ Be-backs not followed up
- ☐ Leads live in a salesperson's phone
- ☐ Follow-up stops after day 3
- ☐ Leases mature unworked
- ☐ Customers the desk couldn't get bought disappear
- ☐ Unsold showroom ups never worked
- ☐ Service customers never sold a car

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 → Appt Set → Confirmed → Shown → Written → Sold
Side lanes: Unsold / Nurture (30-day unsold board, then 36-48 months) · Be-Back (written, not sold) · Not Approved Today · Lease Maturity (90 / 60 / 30 days) · Orphan 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

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 service customers who are in equity or near lease-end flagged to the sales desk? ☐ 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

- ☐ Credit unions / community banks (indirect lending)
- ☐ Insurance agents (total-loss and new-policy events)
- ☐ Body shops / collision centers
- ☐ Independent repair shops
- ☐ Fleet / employer purchase programs
- ☐ Credit repair partner (Not-Approved-Today lane)
- ☐ Rideshare / gig programs
- ☐ Military / first-responder groups

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 sale unenforceable. Where your state allows a cash fee, it runs under your own written program set by your counsel: capped, on a 1099, and never to the buyer of the referred deal. The default is non-cash recognition (co-marketing, partner-branded materials, priority service scheduling, a donation in the partner's name), and monthly partner statements of referrals, appointments and deliveries are useful with no money attached.

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

- ☐ Driver's license
- ☐ Proof of insurance
- ☐ Trade title or lien payoff information
- ☐ Trade keys, second key and service records
- ☐ Co-signer availability
- ☐ Down payment
- ☐ Signed buyer's order / deal jacket signatures
- ☐ Registration / plate transfer details
- ☐ Delivery appointment confirmed
- ☐ First service appointment booked

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ CSI survey heads-up
- ☐ Review request (Google / DealerRater)
- ☐ Thank-you from the GM
- ☐ First service appointment set
- ☐ Trade-cycle / equity / lease-end outreach
- ☐ Birthday / purchase anniversary
- ☐ 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?
Working / re-working internet leads				☐
Answering phone ups and returning missed calls				☐
Following up yesterday's unsold log				☐
Be-back follow-up on written but unsold customers				☐
Confirming appointments and chasing no-shows				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Answering the same customer questions (availability, hours, trade)				☐
Equity-mining call lists				☐
Lease maturity lists (90 / 60 / 30)				☐
Service-drive sales prospecting				☐
Following up customers the desk couldn't get bought				☐
Reading and responding to reviews				☐
Post-delivery follow-up calls and CSI pre-touch				☐
Posting inventory to Facebook Marketplace / social				☐
Save-a-deal and T.O. follow-ups				☐
Building the daily and weekly sales and BDC reports				☐
Data entry between CRM, DMS and spreadsheets				☐
Orphan-owner reassignment and database cleanup				☐
Recruiting and onboarding salespeople and BDC agents				☐
Figuring pay plans and spiffs				☐
				☐
				☐

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
Daily Recap (leads, appointments, shows, sold)	☐			FULL	
Internet Lead Report / Response Time by Rep	☐			FULL	
Lead Source ROI / Cost per Sale	☐			FULL	
Appointment Set / Show Report by Rep and Source	☐			FULL	
Showroom Traffic / Ups Log	☐			SEMI	
Sales Log / Deal Log	☐			ASSIST	
Unsold Follow-up / Desk Log Report	☐			FULL	
Save-a-Deal List	☐			FULL	
Missed Opportunity / Phone Report	☐			FULL	
CRM Task Compliance / BDC Activity	☐			FULL	
Equity / Trade-Cycle Report	☐			SEMI	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Lease Maturity Report	☐			FULL	
Service-to-Sales Report	☐			SEMI	
Reputation / Review Report	☐			SEMI	
Ad Performance (Google / Meta)	☐			SEMI	
Forecast / Month Plan	☐			ASSIST	
Commission statement per salesperson	☐			FULL	
CARS Act Compliance Report (California: first replies and listings with total price, blocked messages, used-car cancellations, records kept)	☐			SEMI	
	☐			--	
	☐			--	

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

Think: Morning work plan, save-a-deal meeting prep, end-of-month push list, aged-lead sweep, OEM lead response-time checks, third-party lead renewal review, Marketplace refresh, BDC schedule, salesperson recruiting.

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 sales department: Launch covers a first touch in under 60 seconds on every internet lead in vehicle and appointment language only (for California stores, with the vehicle's total price in the first written reply that names it), round robin with a claim window, missed-call text-back and call recording on the sales line, appointment booking with confirm and day-of reminders, the 5-day drip, the post-delivery review request, A2P registration prepared with finance-free sample messages, and the daily recap and weekly funnel by source; Growth adds the Variable Ops Engine (unsold board, be-back recovery, equity sweeps, lease maturity board, service-to-sales, owned-list re-activation, show-rate stack, owner's report by source, the Not-Approved-Today lane and after-hours coverage), the 36-to-48-month trade-cycle nurture, per-rep pages and QR cards and the live dashboard; Full Engine adds partner lanes with monthly statements (credit unions, insurance agents, body shops, independents, fleet and employer programs), bird-dog paperwork where your counsel allows it, salesperson and BDC recruiting, the operating-rhythm automations and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Variable Ops Engine

- The Unsold Board: every up that doesn't buy (floor, phone or internet) worked on a 30-day cadence: heavy days 1-3, daily to day 7, tapering to day 30, stop on reply
- Be-Back Recovery: a manager-visible sequence and save-a-deal task for a written-but-unsold guest, with payment language stripped out; any vehicle price shown is its total price
- Equity Mining Sweeps: the sold base swept against the 36-to-54-month trade window, first touch at month 30, in-equity names surfaced as dated tasks
- The Lease Maturity Board: every maturing lease in a 90/60/30-day pull-ahead sequence with an appointment offer
- Service-to-Sales Conquest: RO and service-appointment events fire a trade-appraisal offer and a walk-to-the-desk task
- Owned-List Re-Activation: a scheduled campaign against orphan owners and prior customers sitting in the DMS
- Appointment Show-Rate Stack: confirm, reminder, day-of and no-show recovery, with show rate by rep and source
- The Owner's Report by Source: ups, set, confirmed, shown, sold, close rate and cost per sale by lead source, plus response time by rep
- The Not-Approved-Today Lane: a partner counter card handed in person, the customer self-refers to your credit repair partner, the record stays in nurture
- After-Hours Coverage: the AI assistant answers, qualifies and books during the 7-10pm peak and Saturday morning, fenced from payment, credit and approval language; in California any vehicle it names carries its total price, and every reply is kept 2 years

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 Variable Ops Engine	The Unsold Board; Be-Back Recovery; Equity Mining Sweeps; The Lease Maturity Board; Service-to-Sales Conquest; Owned-List Re-Activation; Appointment Show-Rate Stack; The Owner's Report by Source; The Not-Approved-Today Lane; After-Hours Coverage	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
Owner-routed onboarding	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per salesperson.	–	●	●
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: pay plans and spiffs from DMS deal data.	–	–	●
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`

SPEED TO LEAD & BDC

- ☐ Instant text + email to every internet lead in under 60 seconds, nights and weekends, in vehicle and appointment language only `[L]`
- ☐ Round robin to BDC / salespeople with a claim window and a manager alert on unclaimed leads `[L]`
- ☐ Missed-call text-back on the sales line, with call recording and routing on the tracked line `[L]`
- ☐ Appointment booking tied to the sales desk calendar, with confirm and day-of reminders `[L]`
- ☐ Lead-source tagging so Autotrader, Cars.com, CarGurus, TrueCar and your ads show cost per sold unit `[L]`
- ☐ After-hours coverage: AI assistant answers, qualifies and books during the 7-10pm peak and Saturday morning, fenced from payments, credit and approval language `[G]`

FOLLOW-UP THAT NEVER FORGETS

- ☐ 5-day drip that stops the moment they reply `[L]`
- ☐ The Unsold Board: every up that doesn't buy worked for 30 days on the close-rate curve `[G]`
- ☐ Be-back recovery: manager-visible sequence and save-a-deal task for written-but-unsold guests `[G]`
- ☐ Appointment show-rate stack: confirm, reminder, day-of and no-show recovery, show rate by rep and source `[G]`
- ☐ Long-term nurture of 36 to 48 months, anchored to the trade cycle `[G]`
- ☐ Not-Approved-Today lane: counter card handed in person, customer self-refers to your credit repair partner, record stays in nurture so they come back to you `[G]`

SERVICE-TO-SALES & RETENTION

- ☐ Equity mining sweeps against the sold base, first touch at month 30, in-equity names as dated tasks `[G]`
- ☐ Lease maturity board: every maturing lease in a 90/60/30-day pull-ahead sequence `[G]`
- ☐ Service-to-sales: RO events fire a trade-appraisal offer and a walk-to-the-desk task `[G]`
- ☐ Owned-list re-activation of orphan owners and prior customers in the DMS (ramped, bounce-guarded, auto-unsubscribe) `[G]`
- ☐ Post-delivery review request to Google and DealerRater at the right hour `[L]`
- ☐ Onboarding on Sold: welcome, what-happens-next and secure upload links for delivery documents `[G]`

STORE PRESENCE & REPS

- ☐ Per-salesperson landing pages and QR cards with automatic credit `[G]`
- ☐ Branded email templates with your dealer license and disclosure lines locked in `[G]`
- ☐ Branded email + tracked sales line so customers see one store, not six apps `[L]`
- ☐ Inventory feed or DMS write-back integration beyond the daily export `[+]`
- ☐ Paid ad management for Google and Meta `[+]`

PARTNERS & GROWTH

- ☐ Partner program with tracked links and printed QR counter cards (credit unions, insurance agents, body shops, independents, fleet) `[F]`
- ☐ Monthly partner statements showing referrals, appointments and deliveries `[F]`
- ☐ Partner outreach campaign to build the bench, with a no-fee copy variant `[F]`
- ☐ Bird-dog tracking and paperwork, with compensation set by your counsel for your state `[F]`
- ☐ Recruiting funnel for salespeople and BDC agents `[F]`

COMMAND & CONTROL

- ☐ Daily recap to the GM and weekly funnel report by source `[L]`
- ☐ Owner's report by source: ups, set, confirmed, shown, sold, close rate, cost per sale and response time by rep `[G]`

- ☐ Live dashboard for the GM and dealer principal [G]
- ☐ Compliance shell: consent capture, STOP handling, quiet hours and a finance-word blocklist on every template [L]
- ☐ A2P 10DLC registration prepared: brand matching your W-9 exactly, finance-free sample messages [L]
- ☐ Operating-rhythm automations: morning work plan, save-a-deal list, overdue-task alerts, end-of-month push list, aged-lead sweep [F]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever the store still does by hand [F]

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

- ☐ Total price in the first written reply: any first text, email or chat that names a vehicle or any price or payment carries that vehicle's total price from your inventory feed; with no total price on file, the message waits for a person [L]
- ☐ Message filter on every template and assistant draft: blocks "pre-approved" and "guaranteed approval", government or military endorsement, a rebate-reduced price shown as the total price, and add-ons called required [L]
- ☐ Every written sales, finance and lease message kept for 2 years, the first written reply flagged, and a copy ready when a customer asks for it in writing [L]
- ☐ Listing check: live ads and listings with no total price flagged, dated ad snapshots kept, ads for sold units flagged for removal within 48 hours [G]
- ☐ Used cars at or under $50,000: the 3-day cancellation deadline worked out from the signing date and your closed days, odometer at signing and the 400-mile limit recorded, and the restocking fee calculated (1.5% of the price, $200 minimum, $600 maximum, plus $1 a mile over 250 miles up to $150) [G]
- ☐ Cancellation handling: a 48-hour refund timer, an itemized receipt with the date and time, and messages that discourage cancelling blocked [G]

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 pay plans and spiffs from DMS deal data: 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 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?

- ☐ TCPA prior express written consent, including your lead providers' consent language
- ☐ STOP written back to the record instantly; an opt-out on one channel honored on all
- ☐ Do-Not-Call scrub
- ☐ A2P 10DLC: brand name matches the W-9; sample messages with no finance words
- ☐ Reg Z / Reg M: no payment, down payment, term, APR or lease payment in any automated message
- ☐ FTC Act Section 5 and the FTC's pricing guidance (the federal CARS Rule was vacated in 2025)
- ☐ California CARS Act (SB 766), from Oct 1, 2026: total price in every ad or listing for a specific vehicle
- ☐ CA: total price in the first written reply that names a vehicle or any price or payment; that reply kept 2 years
- ☐ CA: every written sales, finance and lease message kept 2 years, including texts and chat
- ☐ CA: no "pre-approved" or "guaranteed approval"; no government or military endorsement
- ☐ CA: written payment quotes show the total of payments and the down payment or trade assumed
- ☐ CA: written add-on mentions say the add-on is optional and not required
- ☐ CA used cars at or under $50,000: 3-day right to cancel, 400-mile limit, capped restocking fee
- ☐ CA: the paid 2-day contract cancellation option ended Oct 1, 2026
- ☐ FTC Safeguards Rule: Qualified Individual, MFA, per-user roles, encryption, vendor addendum
- ☐ State dealer advertising rules (license #, doc fee, "plus tax, title, license", bait ads)
- ☐ OEM brand standards / co-op pre-approval
- ☐ ECOA / fair lending (no "everyone approved")
- ☐ Bird-dog compensation reviewed by counsel for your state
- ☐ Recorded-call disclosure

Other:

Is the team currently allowed to text customers, and from store 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
Has the store named a Qualified Individual under the Safeguards Rule?	☐ Yes	☐ No

California stores: has your counsel decided whether the doc fee sits inside the advertised total price, and how 2-4 unit business deals are treated under the fleet exemption? ☐ Yes ☐ No

Do any salespeople text customers from personal phones? (Those texts can't be kept for the 2-year record.) ☐ 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 and ups by source
- ☐ Close rate (lead-to-sale and shown-to-sale)
- ☐ Be-backs recovered
- ☐ Reviews / CSI
- ☐ California: first replies and listings carrying the total price
- ☐ Speed to first response, by rep
- ☐ Cost per sold unit by source
- ☐ Equity and lease-maturity appointments
- ☐ BDC agent and salesperson performance
- ☐ Appointments set / confirmed / shown / sold
- ☐ Unsold follow-up contact rate, days 4-30
- ☐ Service-to-sales conversions
- ☐ Partner referrals

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.

- ☐ CRM admin login (or add us as a user) and lead-routing settings
- ☐ Website provider login / form and chat lead routing
- ☐ Daily DMS export of sold, service and lease-maturity lists (CSV)
- ☐ Google Business Profile manager access
- ☐ Business email hosting admin (branded email + calendars)
- ☐ Logo files, headshots and OEM brand guide
- ☐ Qualified Individual's name and a signed Safeguards vendor addendum
- ☐ Third-party lead provider ADF/XML email addresses
- ☐ Inventory feed (CSV / FTP / API)
- ☐ Facebook Business Manager + page admin
- ☐ Google Ads / other ad accounts
- ☐ Domain registrar / DNS login
- ☐ Legal name exactly as on the W-9, dealer license #, EIN, address and website with privacy policy (required for business texting registration)
- ☐ 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
DMS (CDK, Reynolds, Dealertrack, Tekion)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CRM (VinSolutions, eLead, DealerSocket, DriveCentric		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
OEM dealer portal (e.g. GlobalConnect, DealerCONNE		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Website provider admin (Dealer.com, DealerOn, Dealer		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
vAuto	vauto.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Autotrader dealer account	autotrader.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Cars.com dealer account	cars.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CarGurus dealer dashboard	cargurus.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
TrueCar dealer portal	truecar.com	☐ 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	
Service scheduler (Xtime, myKaarma)	xtime.com / mykaarma.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Phone system / call tracking (CallRevu, Car Wars)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Podium or chat / texting tool	podium.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	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Meta Business Suite (ads, page, Marketplace)	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Ads	ads.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
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			