Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Dealership Sales

Everything we need to build the system to how you actually sell. Fill in what you know; leave blank what you don't. Anything left blank is a question for the intake call, not an assumption we'll invent.

About two hours in week one. The builder reads every line, and the fields feed the variable sheet the build runs from.

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BEFORE WE START

Which package, and who we are dealing with.

Launch	Growth	Full Engine
$3,500 + $697/mo	$6,500 + $1,197/mo	$9,500 + $1,697/mo
Every lead answered fast	Plus The Variable Ops Engine	Plus partners and the think-tank

Your name

Title

Email

Cell

Business name

Website

Date

Referred by (rep or partner, if any)

- [ ] We already own our own HighLevel account
- [ ] Regulated industry: book the week-one compliance review
- [ ] Domain, business email and phone already exist
- [ ] Starting from zero: set up domain, email and phone

How to use this packet

Type directly into the boxes and save, or print and write. Checkboxes mark what is true today. The last page is the sign-off that confirms what we'll build. Nothing in this packet asks for passwords, account numbers, or anyone's personal identifiers — we never collect those by form or email.

SECTION 1 OF 10

The store

The basics about the store so we register the brand and set up the account correctly. The legal name must match your W-9 exactly or the texting registration gets rejected.

Legal name exactly as on the W-9

Rooftop or group; number of rooftops

Franchise(s)

New and used units per month

GM, GSM, BDC manager, internet sales manager

- [ ] Brand registration name matches the W-9
- [ ] Dealer’s compliance counsel named

SECTION 2 OF 10

Sales team and BDC

Everyone who takes an internet lead or a phone up. We use this for the rotation, the calendars and the show-rate report. The claim window is how long a rep has to grab a new lead before it moves to the next person.

Salespeople and BDC agents — name, cell and email, one per line

Up rotation and round-robin order

Claim window in minutes

How long one person has to grab a new lead before it moves to the next person in line. 5 is typical.

BDC hours of coverage

For example: Mon-Sat 8am-8pm. Leads outside those hours go to the after-hours owner.

- [ ] After-hours handoff owner named
- [ ] Show-rate reporting by rep wanted

SECTION 3 OF 10 Systems

The software the store already runs. We decide with you whether to connect into your CRM or sit on top of it, and we need a daily export of the sold and service lists either way.

CRM (VinSolutions, eLead, DealerSocket, other)

DMS (CDK, Reynolds, Dealertrack, Tekion, other)

Lead feed format (ADF/XML) and routing

Most third-party leads arrive as ADF/XML email. Tell us the address they land in and who they route to today.

Service scheduling tool

- [ ] Integration or sit-on-top decision recorded
- [ ] Daily export path for the sold and service lists agreed

SECTION 4 OF 10 Lead sources

Where your leads come from and what each source costs a month. Every lead gets tagged by source so the owner's report can show cost per sale.

Third-party lead providers and monthly spend, one per line

Cars.com, Autotrader, CarGurus, TrueCar and any others, with the monthly spend for each.

OEM lead feed and SLA

The manufacturer's response-time rule for their leads, for example 15 minutes.

Website form and chat leads

Phone ups per month

- [ ] Source tag list confirmed
- [ ] Cost per sale by source is wanted on the owner's report

SECTION 5 OF 10 Pipeline and cadences

We ship a standard set of stages you can rename, plus follow-up sequences for unsold customers, lease maturities and equity mining. Nothing in these messages mentions payments, terms or approvals.

Confirm or rename each stage

Unsold cadence timing (days 1-3, to 7, to 30)
How hard to follow up after someone leaves without buying. Keep the defaults unless your process differs.

Lease maturity list source

Equity sweep first-touch month
How many months into ownership we first reach out about trading up. 24 to 30 is common.

- [ ] No payment, term or approval language in any cadence
- [ ] Save-a-deal task owner named

SECTION 6 OF 10 Service drive

Turning service customers into trade-ins. Tell us where repair-order events come from, what the trade offer should say and who walks the customer to the sales desk.

RO event source
Where we learn a car is in service: DMS export, scheduling tool or a daily list from the service manager.

Trade-appraisal offer copy

Walk-to-the-desk task owner

- [ ] Service manager agrees to the conquest flow

SECTION 7 OF 10

Partners

Outside relationships that send you buyers. Referral pay to non-licensed people is regulated state by state, so anything with money attached goes to your counsel first. Nobody who is the buyer of the referred deal ever gets paid.

Credit unions and banks with indirect relationships

Insurance agents, body shops, independent repair shops

Fleet and employer programs

Credit repair partner for the not-approved-today lane

Who turned-down customers go to. We route them there and bring them back when they are ready.

- [ ] Bird-dog compensation reviewed by dealer's counsel for this state
- [ ] Counter cards handed in person, never texted with decision language
- [ ] No payment to the buyer of the referred deal

SECTION 8 OF 10

Compliance and Safeguards

The FTC Safeguards Rule requires the dealer to name one person responsible for data security and to sign a vendor addendum with us. This section collects that plus who approves message templates.

Qualified Individual name

The person your store named as responsible for the Safeguards program. Often the controller or GM.

Vendor addendum to sign

State advertising rules that apply

Anything your state requires or forbids in vehicle ads, for example price disclosures.

Template approval process

- [ ] Compliance review booked in week one
- [ ] No PII emailed in the clear
- [ ] MFA and per-user roles enabled
- [ ] Nothing references the CARS Rule as live

SECTION 9 OF 10

Phone and texting

What we need to set up your tracked sales line and register it for texting. The carriers approve faster when the privacy policy, the form wording and the sample messages all match, so paste them exactly.

Tracked sales line

Privacy policy URL with SMS clause

Opt-in wording on each form

Sample messages for the campaign
Two or three examples of texts you would actually send. No finance or credit words.

- [ ] Sample messages contain no finance words
- [ ] Client submits the registration; we prepare it

SECTION 10 OF 10

Reporting

When the daily recap and weekly report go out, who gets them, and when the save-a-deal meeting happens so the system can prepare the list.

Daily recap time and recipients

Weekly report day

Save-a-deal meeting time

- [ ] Response time by rep is wanted
- [ ] Dashboard viewers named

THE NEVER-LIST FOR FRANCHISED DEALERSHIP SALES

What our automations will never say.

Tick each line to confirm you've read it. These are the rules every template is checked against before it goes live.

- [ ] A monthly payment figure, $X down, a term length, an APR or 0% financing.
- [ ] Approved, pre-approved, approval, guaranteed approval, you qualify.
- [ ] Anything about the customer's credit score, credit tier or credit-based eligibility.
- [ ] A trade allowance stated as a firm number.
- [ ] Any automated copy that is not vehicle, availability, appointment or trade-appraisal language.
- [ ] Customer PII emailed in the clear; the CRM must support MFA and per-user roles under the Safeguards Rule.
- [ ] Any reference to the CARS Rule as if it were in effect.
- [ ] A bird-dog payment to the buyer of the referred deal, or any contingent referral payment the dealer's counsel has not approved for that state.

ANYTHING ELSE

What we didn't ask.

The three tasks eating the most time each week

What a great first 90 days looks like

Tools we already pay for (and which ones we actually use)

Anything else we should know

SIGN-OFF

This is what we'll build.

By signing you confirm the package chosen on page 1, that the information in this packet is accurate to the best of your knowledge, and that every automated template will be reviewed by your compliance contact before it goes live.

Signature

Date

Printed name

Title

What happens next

Within two business days you get a one-page brief and a fixed quote. Week one is intake and foundation; week four is handoff. everbornproductions@gmail.com · (916) 541-3415.