Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Home Services Intake Packet

Everything we need to build your missed-call coverage, your unsold-estimate rehash, your seasonal sweeps and maintenance renewals, and your Monday owner's report. Snap Credit Fix, a California credit repair company, runs on a system I built for them.

How to use this packet: fill in what you can, skip what you don't know, and we'll finish the rest together on the intake call. Type directly into the fields (works in Adobe Reader, Preview, Chrome, and most phones) or print and hand-write.

Sections 1-8 tell us who you are and how you work today. Section 9 is the monthly time audit – where your hours actually go. Section 11 shows the three packages and add-ons. Section 12 is a menu of what we can take off your plate; tick everything that sounds useful and write down your top three.

Nothing here commits you to anything. It becomes your one-page Client Brief and a fixed quote within two business days. **Return this packet through a secure upload link, not by email.**

COMPANY

YOUR NAME

DATE

EVERBORN CONTACT

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1. Company Basics

Legal company name (exactly as on your W-9)

DBA / brand name

Main phone

Main email

Website

Office address (city, state, zip)

DBA

Trade(s)

Contractor license number(s)

State(s) licensed in

Year founded

Office / shop address (city, state, zip)

Trucks / crews (#)

Service area (cities / counties)

Owner, office manager, dispatcher

Company type

- ☐ Roofing (retail)
- ☐ Roofing (insurance / storm)
- ☐ HVAC
- ☐ Plumbing
- ☐ Electrical
- ☐ Solar
- ☐ Remodeling / kitchen and bath
- ☐ Windows / siding / gutters

Other:

Products / services you actively sell

- ☐ Repair / service calls
- ☐ System replacement / changeout
- ☐ Roof replacement
- ☐ Roof repair
- ☐ Maintenance agreements / memberships
- ☐ Tune-ups
- ☐ New installs
- ☐ Remodels
- ☐ Solar / battery
- ☐ Water heaters
- ☐ Panel upgrades / EV chargers
- ☐ Insurance claim work
- ☐ Financing offered
- ☐ Commercial work

Other:

Jobs sold per month

Average ticket (sold job)

Average days from lead to sold

12-month revenue goal

In one or two sentences, who is your ideal homeowner, and why do they pick you over the other quotes they got?

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 (Owner / Office manager / CSR / call-taker / Dispatcher / Comfort advisor / sales rep / Technician / Canvasser)	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?

- ☐ Whoever answers the phone books it
- ☐ Office manager assigns
- ☐ Round robin to comfort advisors / reps
- ☐ By territory / zip
- ☐ By job type (repair vs. replace, retail vs. insurance)
- ☐ Dispatcher assigns by truck schedule

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)
- ☐ Truck wrap and yard-sign photos
- ☐ Job photos / before-and-after
- ☐ Tech and advisor headshots
- ☐ Manufacturer certifications and co-op rules
- ☐ Existing email signature
- ☐ Brochures / option sheets

Other:

Google Business Profile link

Review links (Google Business Profile / Yelp / Angi / Facebook / BBB / Nextdoor)

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. '[Company Name] · CSLB License #XXXXXX') – paste it exactly

(California example) – paste your exact line; your license number goes on every email footer, text signature, landing page, yard sign and QR card

Anything we must NEVER say or promise (tax-credit or rebate amounts, savings guarantees, "payments as low as", "$0 down", "we'll cover your deductible", anything that sounds like the utility, the government or the insurer)?

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 / ?
Field service / job management (ServiceTitan, Housecall Pro, Jobber, JobNimbus, AccuLynx)				
Estimating / proposals (job-system pricebook, Xactimate, Roofr, EagleView)				
Financing lenders and portals (GreenSky, Synchrony, Service Finance, GoodLeap)				
E-signature (DocuSign, job-system e-sign)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / call tracking (CallRail, RingCentral)				
Answering service / after-hours				
Email hosting (Google / Microsoft)				
Domain registrar & DNS				
Website host / builder				
Google Local Services Ads				
Google Ads account				
Facebook / Instagram ads account				
Lead marketplaces (Angi, HomeAdvisor, Thumbtack)				
Canvassing app (SalesRabbit, Spotio)				
Job photos (CompanyCam)				
Review management (Podium, Birdeye, NiceJob)				
Maintenance agreement / membership tracking				
Email / postcard marketing				
Spreadsheets / shared drives (open estimates, permits)				
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
☐ Google Local Services Ads		☐ Google Ads / search	
☐ Facebook / Instagram ads		☐ Angi / HomeAdvisor	
☐ Thumbtack		☐ Website forms	
☐ Phone calls (truck, yard sign, mailers)		☐ Referrals / past customers	
☐ Yard signs / neighbor jobs		☐ Door knocking / canvassing	
☐ Manufacturer dealer locator		☐ Realtors, property managers and HOAs	
☐ Other trades		☐ Storm / insurance leads	
☐ Home shows / events		☐ Other:	

Lead → set %

Set → sat %

Sat → sold % (close rate)

Cost per lead and per sold job 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?

- ☐ Calls ring out or go to voicemail
- ☐ Old unsold estimates are never re-worked
- ☐ Past customers never hear from us
- ☐ After-hours calls wait until morning
- ☐ Financing turn-downs go silent
- ☐ Canvass leads are texted without written opt-in
- ☐ Estimates die without a third touch
- ☐ Maintenance agreements lapse

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 → Set → Sat → Estimate Out → Sold → In Production → Complete
Side lanes: Unsold / Rehash (days 2-90, then seasonal) · Financing Turn-Down · Insurance Claim (roofing) · Maintenance Base · Cancelled in Window

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

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

Does every open estimate get more than two follow-up touches today? ☐ Yes ☐ No

Do canvass and door-knock leads give written opt-in before any automated text? ☐ Yes ☐ No

Do homeowners get job-progress photos or updates during the install? ☐ 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

- ☐ Realtors / brokerages
- ☐ Property managers
- ☐ HOAs (preferred-vendor status)
- ☐ Other trades (plumber, electrician, roofer, gutters)
- ☐ Supply houses
- ☐ Manufacturer dealer programs
- ☐ Home inspectors
- ☐ Restoration companies
- ☐ Insurance agents (education only)
- ☐ Past customers
- ☐ Home-equity / mortgage lender for customer financing (recognition and co-marketing only, no referral fees)

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. A flat, modest referral fee is allowed only to someone permitted to receive it, and only when it is disclosed to the homeowner on the estimate or contract; check your contractor board and any construction anti-kickback statute first, and your state's real estate commission rule before paying a realtor. Never on insurance-funded work, never to adjusters, inspectors acting for a lender or HOA board members personally. Insurance agents can be education partners with no per-referral pay.

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

- ☐ Signed contract with the cancel notice
- ☐ Deposit (within your state's down-payment cap)
- ☐ Financing paperwork
- ☐ Change-order signatures
- ☐ Permit application and approval
- ☐ HOA approval
- ☐ Utility interconnection (solar)
- ☐ Adjuster appointment and supplements (roofing claims)
- ☐ Progress and final payments
- ☐ Warranty registration (serial numbers)
- ☐ Final walk / punch-list sign-off
- ☐ Crew job photos

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Review request at completion (second ask if no click)
- ☐ Final photos and thank-you
- ☐ Warranty registration confirmation
- ☐ Maintenance agreement offer
- ☐ Seasonal tune-up reminders
- ☐ Referral ask / neighbor mailer
- ☐ Annual check-in
- ☐ 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?
Calling new leads back				☐
Returning missed and after-hours calls				☐
Booking and confirming appointments				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Estimate follow-up (did they get the quote?)				☐
Re-working old unsold estimates				☐
Sending contracts and chasing signatures				☐
Collecting deposits and progress payments				☐
Following up financing turn-downs				☐
Permit and HOA chase				☐
Sending job-site photos and updates to homeowners				☐
Change orders				☐
Seasonal tune-up reminders and agreement renewals				☐
Warranty registration				☐
Review requests after the job				☐
Insurance claim paperwork and supplements (roofing)				☐
Neighbor mailers and door hangers after a job				☐
Weekly numbers for the owner				☐
Data entry between the job system, CRM and spreadsheets				☐
Chasing unpaid invoices and declined cards				☐
Checking who is on a maintenance plan but not billed				☐
				☐
				☐

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 Huddle Numbers (calls, sets, sits, sold)	☐			FULL	
Lead Source / Cost per Sold Job	☐			FULL	
Calls Answered / Missed	☐			FULL	
Set Rate, Sit Rate and Close Rate by Rep	☐			FULL	
Open Estimate Book (unsold dollars)	☐			FULL	
Rehash / Aged-Estimate Results	☐			FULL	
Maintenance Agreement Count and Renewals	☐			FULL	
Review / Reputation Report	☐			FULL	
Install Calendar / Production Schedule	☐			SEMI	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Permit Stall Report	☐			SEMI	
Progress Payments Due / A/R	☐			SEMI	
Financing Applications and Turn-Downs	☐			SEMI	
Callback / Warranty Claim Rate	☐			SEMI	
Canvassing Results by Rep	☐			SEMI	
Job Costing / Gross Margin by Job	☐			ASSIST	
Tech and Advisor Commission Inputs	☐			ASSIST	
Commission statement per tech / rep	☐			FULL	
Billing reconciliation (maintenance plans)	☐			FULL	
	☐			--	
	☐			--	

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

Think: Daily huddle, install calendar review, permit checks, supply orders, seasonal campaign launches (late August for furnaces, February for AC), license and insurance renewals, warranty-claim intake, commission and spiff calculations.

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 contractor: Launch covers missed-call text-back and a sub-60-second reply on every lead, round robin to comfort advisors with a claim window, booking tied to the truck schedule, the estimate follow-up drip, the review request at job completion, license numbers and quiet hours in the compliance shell, a written opt-in step for canvass leads, and the daily recap and weekly funnel report; Growth adds the Unsold Estimate & Season Engine (7-touch rehash, aged-estimate seasonal sweeps, financing turn-down lane, tune-up and agreement renewals, job-progress photos, contract and cancel-notice chase, change orders and progress payments, neighbor lane, insurance-claim status lane and the cancel-window welcome), the after-hours assistant, owned-list re-activation and the live dashboard; Full Engine adds partner lanes for realtors, property managers, HOAs, other trades, supply houses, inspectors and restoration companies, with statements carrying a disclosed fee only where legal, tech, canvasser and advisor recruiting, the operating-rhythm automations and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Unsold Estimate & Season Engine

- Unsold-Estimate Rehash Lane: 7 touches over 7 days from day 2, then days 14, 30, 60 and 90, with financing-available and phased-job variants, no payment figures
- Aged-Estimate Seasonal Sweep: every unsold estimate over 90 days re-worked in the shoulder windows (late August furnaces, February AC, pre-storm roofing, Q1 remodel)
- Financing Turn-Down Lane: a second-look lender, a cash or phased option, a credit repair introduction when the homeowner asks, and a 30-day nurture
- Tune-Up and Maintenance-Agreement Renewal: twice-yearly reminders before the search spike, renewal invoicing and lapsed-agreement win-back
- Job-Progress and Photo Updates: crew photos to a job folder and a same-day homeowner update; final photos feed the review and warranty tasks
- Contract, Cancel-Notice and Paperwork Chase: e-sign packet with the cancel notice and state disclosures, plus the permit, HOA, interconnection and warranty checklist
- Change-Order and Progress-Payment Flow: change order to e-sign to invoice to payment link, with an owner approval gate and your state's down-payment cap enforced
- Neighbor Lane: yard-sign QR and per-rep pages tag we're-on-your-street leads, and a radius mailer or door-hanger list is generated
- Insurance-Claim Status Lane (roofing): adjuster reminders, supplement tasks and homeowner status texts, with no deductible or adjusting language
- Cancel-Window Welcome Sequence: what-happens-next during the right-to-cancel window, with any cancellation routed instantly to the owner

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 Unsold Estimate & Season Engine	Unsold-Estimate Rehash Lane; Aged-Estimate Seasonal Sweep; Financing Turn-Down Lane; Tune-Up and Maintenance-Agreement Renewal; Job-Progress and Photo Updates; Contract, Cancel-Notice and Paperwork Chase; Change-Order and Progress-Payment Flow; Neighbor Lane; Insurance-Claim Status Lane (roofing); Cancel-Window Welcome Sequence	–	●	●
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.	–	●	●
Billing that runs itself	Branded invoice email; a reminder ladder (3 days before due, due day, a 3-day grace nudge, a final notice at 7 days); card-on-file autopay with a 'charge coming up' notice and a 'card declined, update your card' notice; receipts; invoice defaults (terms, due days, logo, from address). Email-first. For you: memberships, invoices and financing follow-up.	–	●	●
Auto-drafted invoices	When a client is added in your industry system, a blank draft invoice for that client appears in the CRM, ready for staff to fill in and send. Nothing reaches the client until a person sends it. On Growth it needs the third-party integration add-on. For you: drafts from the field-service platform.	–	add-on	●
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: tech and sales comp.	–	–	●
Billing reconciliation	One view of who is billed, who paid, who is overdue and who is being missed, across the CRM, your industry system and any old processor. Catches clients who are active in service but not billed anywhere. For you: maintenance 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	o lite	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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 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

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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**	
☐	**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. **Moving your payment processor: included at no charge.**

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

- ☐ Missed-call text-back on every line, including the calls that come in after 5pm `[L]`
- ☐ Instant text + email to every new lead in under 60 seconds `[L]`
- ☐ Round robin to comfort advisors / reps with a claim window `[L]`
- ☐ Booking calendar tied to the truck schedule, with confirmations and reminders `[L]`
- ☐ Source tags for LSA, Google Ads, Angi, Thumbtack, Meta, referral, yard sign, door knock and manufacturer locator `[L]`
- ☐ After-hours assistant that sorts repair vs. replace and insurance vs. retail and books the visit; it never quotes price or savings `[G]`

ESTIMATES & REHASH

- ☐ Estimate follow-up drip that stops when the homeowner replies or opts out `[L]`
- ☐ 7-touch rehash from day 2, then days 14, 30, 60 and 90, with financing-available and phased-job variants `[G]`
- ☐ Aged-estimate seasonal sweep every shoulder window `[G]`
- ☐ Financing turn-down lane: second-look lender, cash or phased option, credit repair introduction on request, 30-day nurture `[G]`
- ☐ Neighbor lane: yard-sign QR, per-rep landing pages and a radius mailer list `[G]`

CONTRACTS, JOBS & PAYMENTS

- ☐ Contract and paperwork chase: e-sign packet with the cancel notice and state disclosures, plus a permit, HOA, interconnection and warranty checklist `[G]`
- ☐ Cancel-window welcome sequence, with cancellations routed instantly to the owner `[G]`
- ☐ Change order to e-sign to invoice to payment link, with owner approval `[G]`
- ☐ Deposit and progress-payment links with reminders until paid `[G]`
- ☐ Same-day job-progress photo updates to the homeowner `[G]`
- ☐ Insurance-claim status lane for roofing: adjuster reminders, supplement tasks, homeowner updates `[G]`

MAINTENANCE BASE & PAST CUSTOMERS

- ☐ Tune-up and maintenance-agreement renewals launched before the search spike, with payment links `[G]`
- ☐ Lapsed-agreement win-back `[G]`

- ☐ Owned-list re-activation of old leads and past customers (ramped, bounce-guarded, auto-unsubscribe) [G]
- ☐ Review request at job completion, with a second ask if no click [L]
- ☐ Seasonal newsletter written and sent for you [+]

PARTNERS & GROWTH

- ☐ Partner program with tracked links and printed QR cards for realtors, property managers, HOAs, other trades and supply houses [F]
- ☐ Monthly partner statements, carrying a disclosed flat fee only where one is legal [F]
- ☐ Partner outreach campaign, with a no-fee copy variant [F]
- ☐ Recruiting funnel for techs, canvassers and comfort advisors [F]
- ☐ Paid ad management for LSA, Google and Meta [+]

COMMAND & CONTROL

- ☐ Daily recap and weekly funnel report [L]
- ☐ Full Monday owner's report and live dashboard: set, sit, close and unsold dollars by source and rep [G]
- ☐ Compliance shell: license number on every footer and card, quiet hours 8am-9pm (8pm in Oregon), no payment figures, written opt-in for canvass leads [L]
- ☐ A2P 10DLC registration prepared with sample messages that match your form consent [L]
- ☐ Operating-rhythm automations: daily huddle numbers, install calendar alerts, permit-stall alerts, warranty-claim intake, callback tracking [F]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever the office still does by hand [F]

MONEY DESK

- ☐ Owner-routed onboarding: every new customer gets the welcome from their own rep – the rep's name, email and own sign-up link – so the file lands in that rep's queue; one message per customer, never duplicates [G]
- ☐ Billing that runs itself for memberships, invoices and financing follow-up: branded invoice email, a reminder ladder (3 days before, due day, 3-day grace, final notice at 7 days), card-on-file autopay with 'charge coming up' and 'card declined' notices, receipts [G]
- ☐ Auto-drafted invoices: a customer added in your field-service platform creates a blank draft invoice in the CRM for staff to finish and send; nothing reaches the customer until a person sends it (on Growth, with the third-party integration add-on) [F]
- ☐ Commission ledger for tech and sales comp: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per rep and a 'needs attention' list [F]
- ☐ Billing reconciliation for maintenance plans: who is billed, who paid, who is overdue and who is being missed, across the CRM, your field-service platform and any old processor [F]
- ☐ Moving your payment processor, included at no charge: every paying customer moved to new payment links or card-on-file; old invoices cancelled only after payment clears [L]

Top pick #1

Top pick #2

Top pick #3

Anything you want that isn't on the list

13. Compliance & Consent

Your industry's marketing is regulated. We build the guardrails in; you tell us your rules.

Which apply to you?

- ☐ TCPA prior express written consent; a canvasser's verbal number is not consent
- ☐ Opt-outs honored across every channel
- ☐ Quiet hours of 8am-9pm (8pm in Oregon)
- ☐ State mini-TCPA laws (e.g. Texas, Oregon, Florida FTSA)
- ☐ License number in all advertising (e.g. California BPC 7030.5)
- ☐ Right-to-cancel notice with every home-solicitation contract (3 business days federally; longer for seniors, disaster repair or Texas solar)
- ☐ State contract rules (e.g. CSLB 7159) and down-payment caps
- ☐ Reg Z: no payment figures in automated messages; financed price equals the cash price
- ☐ No deductible waivers or rebates on insurance work
- ☐ No 25D tax-credit claims (the credit ended for systems placed in service after December 31, 2025)
- ☐ Referral fees disclosed to the homeowner and checked against state rules
- ☐ Email CAN-SPAM opt-out

Other:

Is the office currently texting customers from company numbers? ☐ Yes ☐ No

Do your web forms capture written consent to text and call? ☐ Yes ☐ No

Does your contract packet include the cancel notice and state disclosures today? ☐ Yes ☐ No

Do you do insurance-claim work? ☐ 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 by source
- ☐ Calls answered vs. missed
- ☐ Speed to first response
- ☐ Set rate / sit rate / close rate
- ☐ Cost per sold job by source
- ☐ Open estimate book (unsold dollars)
- ☐ Rehash and aged-estimate recoveries
- ☐ Average ticket
- ☐ Maintenance agreement count and renewals
- ☐ Financing turn-downs
- ☐ Reviews
- ☐ 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.

- ☐ Job-management system admin or export (customers, sold jobs, agreements)
- ☐ Maintenance agreement list with renewal dates
- ☐ Angi, HomeAdvisor and Thumbtack accounts (lead delivery settings)
- ☐ Website login / form lead routing
- ☐ Domain registrar / DNS login
- ☐ Current contract, cancel notice and state disclosure documents
- ☐ Logo files, truck and yard-sign photos
- ☐ Open-estimate export with dates, amounts and reps
- ☐ Google LSA, Google Ads and Meta ad accounts
- ☐ Google Business Profile manager access
- ☐ Google Workspace / Microsoft 365 admin
- ☐ License number(s) exactly as issued, EIN, legal address and website with privacy policy (required for business texting registration)
- ☐ Financing lender list and dealer-fee terms
- ☐ 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
ServiceTitan	servicetitan.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Housecall Pro	housecallpro.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Jobber	getjobber.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
JobNimbus / AccuLynx (roofing)	jobnimbus.com / acculynx.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Local Services Ads	ads.google.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	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Meta Business Suite	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Angi / HomeAdvisor pro account	angi.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Thumbtack pro account	thumbtack.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Yelp for Business	biz.yelp.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Financing lender portal (GreenSky, Synchrony, Service		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Xactimate / EagleView (roofing)	xactware.com / eagleview.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Manufacturer dealer portal (Carrier, Trane, Lennox, GA		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CompanyCam	companycam.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
City / county permit portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
State contractor license board	cslb.ca.gov	☐ 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			