Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Home Services

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**
$3,500 + $697/mo
Every lead answered fast

☐ **Growth**
$6,500 + $1,197/mo
Plus The Unsold Estimate & Season Engine

☐ **Full Engine**
$9,500 + $1,697/mo
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 12
The company

The basics about your company so we set up the account, the templates and the cards correctly. Your license number has to appear on every template and yard sign, so copy it exactly.

Legal name and DBA

Trade(s): roofing, HVAC, solar, remodel, plumbing, electrical

License number(s) and state(s)

Revenue band and trucks

Owner, office manager, dispatcher, comfort advisors
Names and roles. Comfort advisors are your in-home sales reps.

- [ ] License number appears on every template and card
- [ ] Retail vs. insurance vs. financed mix known

SECTION 2 OF 12
Sales team

Everyone who runs appointments. We use this for the round-robin, their booking calendars and their per-rep pages and yard-sign QR codes. The claim window is how long a rep has to grab a new lead before it moves to the next person.

Reps and advisors — name, cell, email and territory, one per line

Round-robin order and claim window
The rotation order and how many minutes a rep has to accept a lead before it rolls on. 5 is typical.

Truck schedule and booking rules
Days and hours each rep can be booked, and any drive-time or territory limits.

- [ ] Each rep has a booking calendar
- [ ] Per-rep pages and yard-sign QR approved

SECTION 3 OF 12 Systems

The software you already run jobs in. We hand sold jobs into that system rather than replacing it, and if you already pay for a marketing add-on we note where it overlaps.

Field-service or job-management system
ServiceTitan, Jobber, Housecall Pro, JobNimbus, AccuLynx or other.

Estimating tool

E-sign tool

Financing lenders and portal

- [ ] Handoff of sold jobs into the job system agreed
- [ ] Marketing Pro or equivalent overlap noted

SECTION 4 OF 12 Lead sources

Where your leads come from and what each source costs a month. Every lead gets tagged so the report shows cost per sale. Canvass leads need a written opt-in step before we can text them.

LSA, Google Ads and Meta spend

Angi, HomeAdvisor, Thumbtack accounts and lead deposits

Canvassing program and consent capture method
If you knock doors, how the homeowner's permission to contact is recorded: tablet form, paper, app.

Manufacturer dealer-locator feeds

- [ ] Source tag list confirmed
- [ ] Written opt-in step exists for canvass leads

SECTION 5 OF 12

Pipeline and estimates

We ship a standard set of stages you can rename, plus a rehash sequence that follows up on open estimates. Nothing in these messages quotes a payment figure, and hot replies go straight to the rep who wrote the quote.

Confirm or rename each stage

Open estimate book size (dollars)
The total dollar value of quotes out there that have not closed. A rough number is fine.

Rehash sequence variants: financing available, phased scope
Rehash means re-approaching an unsold estimate. Tell us which angles you use: financing, breaking the job into phases, seasonal timing.

Seasonal sweep dates for this trade
When you push the database each year, for example fall furnace tune-ups or spring AC.

- [ ] No payment figures in any touch
- [ ] Hot replies route to the rep who wrote the quote

SECTION 6 OF 12

Contracts and cancellation

Home-improvement contracts have state rules about cancellation notices, down payments and disclosures. Tell us what applies to you so the contract packet ships right every time.

State contract requirements (e.g., CSLB 7159)
Any state law your contract must follow. In California that is CSLB section 7159.

Cancel window: 3, 5 or 7 business days by case
How many business days the homeowner has to cancel. Usually 3, longer for seniors or emergency work in some states.

Down-payment cap, if any

Solar disclosure document, if applicable

- [ ] Cancel notice ships in duplicate with the contract
- [ ] No language pressuring a waiver

SECTION 7 OF 12

Financing

How customers pay for bigger jobs and what happens when they are turned down. The financed price has to match the advertised cash price, and turn-down messages never mention the credit decision.

Point-of-sale lenders and dealer fees

Second-look lender

Credit repair partner for the turn-down lane

PACE exposure, if any

Property-assessed financing repaid through property taxes. Heavily regulated; tell us if you have ever used it.

- [ ] Financed price equals advertised cash price
- [ ] Turn-down copy has no decision language

SECTION 8 OF 12

Maintenance base

Your service agreements are recurring revenue. Tell us how many you have, when they renew and when you run tune-up campaigns so the system reminds customers before they lapse.

Agreement count and renewal dates

Tune-up campaign windows

The weeks each year you push tune-ups, for example September for furnaces, April for AC.

Payment link for renewals

- [ ] Lapsed-agreement list available

SECTION 9 OF 12

Insurance work (roofing)

Skip this unless you do insurance claim work. Messages about claims never mention deductibles or anything that sounds like adjusting, so we need to know how that side of the business runs.

Share of jobs that are claims

Adjuster meeting workflow

Supplement tracking owner

Who follows up with the carrier when the first payout misses items.

- [ ] No deductible language anywhere
- [ ] No adjusting language anywhere

SECTION 10 OF 12 Partners

Who sends you work and whether any of them get paid for it. Referral fees have to be disclosed to the homeowner on the estimate or contract, and no fee can attach to insurance-funded jobs.

Realtors, property managers, HOAs

Other trades in reciprocal lanes

Supply houses and manufacturer programs

Referral fee amount, if any, and who may receive it
Dollar amount or percentage, and which partners qualify. Write 'none' if you do not pay referral fees.

- [ ] Fee disclosed to the homeowner on the estimate or contract
- [ ] No fee on insurance-funded work
- [ ] State contractor-board rule checked before cash

SECTION 11 OF 12 Compliance

Texting rules differ by state, including when you can send and how opt-outs work. Tell us where you operate and who checks templates before they go live. Any solar copy that still mentions the 25D tax credit gets removed.

States served and their mini-TCPA rules
Just list the states. We look up the state texting rules; flag any you already know about.

Quiet hours by state
Hours you may not text, for example 8pm to 8am in Florida. Leave blank and we apply the strictest state.

Template reviewer

- [ ] Compliance review booked in week one
- [ ] Opt-out keywords honored across channels
- [ ] 25D claims removed from all copy

SECTION 12 OF 12 Phone, texting and reporting

What we need to set up your tracked number, register it for texting and send the owner's report. The registration has to match the consent wording on your forms.

Tracked number

Privacy policy URL

Owner's report day and recipients

- [ ] A2P sample messages match the form consent language
- [ ] Set rate, sit rate, close rate and unsold dollars wanted

THE NEVER-LIST FOR HOME SERVICES CONTRACTING

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.

- [ ] Tax-credit or rebate amounts stated as facts for the homeowner. The federal 25D credit ended for systems placed in service after December 31, 2025; a 30% tax credit message is now a false claim.
- [ ] Savings guarantees or eliminate-your-electric-bill.
- [ ] Any triggering payment term (payments as low as $89 a month, 60 months, $0 down) without the Reg Z disclosures. The safe path is no payment figures in automated messages at all.
- [ ] We'll cover your deductible, or any deductible waiver or rebate on insurance work.
- [ ] Anything implying affiliation with the utility, the government or the insurer.
- [ ] Anything a public adjuster does: negotiating the claim value on the homeowner's behalf.
- [ ] Messages outside 8am to 9pm (8pm in Oregon), or to anyone who opted out on any channel.
- [ ] Content that pressures a buyer to waive the cancellation window, or your-contract-is-final language.
- [ ] A cash price in an automated message that differs from the financed contract price.

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.