CLIENT INTAKE PACKET · FILLABLE

Insurance Agency Intake Packet

Everything we need to build your speed-to-lead front door, your x-date and renewal cadence, your pending-cancel saves, your account rounding and your Monday agency 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)

Agency legal name

DBA

Agency license number(s)

States licensed in

Independent, cluster or captive (name the carrier or cluster)

Year founded

Commission book size (annual)

Policies in force (PIF)

Retention rate (rolling 12), if known

Company type

- ☐ Independent agency
- ☐ Cluster / aggregator member (SIAA, Smart Choice)
- ☐ Captive agency (State Farm, Allstate, Farmers, other)
- ☐ Scratch agency (building a new book)
- ☐ Life and health agency
- ☐ Medicare-focused agency
- ☐ Commercial lines agency

Other:

Products / services you actively sell

- ☐ Personal auto
- ☐ Homeowners
- ☐ Renters / condo
- ☐ Umbrella
- ☐ Motorcycle / RV / boat
- ☐ Flood
- ☐ Business owners (BOP) / general liability
- ☐ Workers' compensation
- ☐ Commercial auto
- ☐ Term life
- ☐ Permanent life
- ☐ Health / ACA marketplace
- ☐ Medicare

Other:

New policies written per month

Average commission per household (or policy)

Average days from quote to bind

12-month new-business and retention goal

In one or two sentences, who is your ideal household or business client, and why do they stay with your agency?

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 (Principal / Producer / CSR / Account manager / Commercial lines manager / Life / health specialist / Office manager)	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 grabs it first
- ☐ Principal assigns manually
- ☐ Round robin (by rule)
- ☐ By line of business
- ☐ By state / territory
- ☐ Each producer works only their own leads

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)
- ☐ Producer headshots
- ☐ Carrier-approved marketing pieces
- ☐ Captive carrier brand guide (if captive)
- ☐ Existing email signature with license numbers
- ☐ Testimonials / review screenshots
- ☐ Welcome kit / post-bind materials

Other:

Google Business Profile link

Review links (Google Business Profile / Facebook / Yelp)

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. '[Agency Name] · License #XXXXXXX · [Agent Name], License #XXXXXXX') – paste it exactly

Paste your exact line; in California the license number goes on every email involving licensable activity, in matching type size

Anything we must NEVER say or promise (a premium, rate or "save $X" that isn't from an actual quote, "you're covered" before the carrier binds, a gift for quoting, a carrier name you aren't appointed with, Medicare plan benefits or "free")?

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 / ?
AMS (Applied Epic, EZLynx, HawkSoft, AMS360, QQCatalyst)				
Sales CRM (AgencyZoom, Better Agency)				
Comparative rater (EZLynx Rater, TurboRater, PLRating)				
Carrier download (IVANS)				
Carrier agent portals				
E-signature (DocuSign, AMS e-sign)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / texting (RingCentral, Nextiva, Dialpad)				
Email hosting (Google / Microsoft)				
Domain registrar & DNS				
Website host / builder				
Shared lead vendors (EverQuote, SmartFinancial, QuoteWizard)				
Consent certificates (TrustedForm, Jornaya)				
Payment links / premium finance				
Calendar / booking				
Email marketing / newsletter				
Review management				
Facebook / Instagram ads account				
Google Ads / Local Services Ads				
Life and Medicare quoting / enrollment platforms				
Spreadsheets / shared drives (x-date list, pending cancels)				
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
☐ Client referrals		☐ Mortgage loan officer referrals	
☐ Realtor referrals		☐ Auto dealer / F&I referrals	
☐ CPA, attorney and advisor referrals		☐ Shared internet leads (EverQuote, SmartFinancial, QuoteWizard)	
☐ Exclusive leads / live transfers		☐ Website quote form	
☐ Google search / Local Services Ads		☐ Facebook / Instagram ads	
☐ Walk-ins / phone-ins		☐ X-date prospecting (lost quotes, prior prospects)	
☐ Cross-sell to existing clients		☐ Community events / sponsorships	
☐ Other agents / BGA		☐ Other:	

Lead → contacted %

Contacted → quoted %

Quoted → bound % (close ratio)

Cost per bound policy 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 first response on internet leads
- ☐ Quotes never chased past the first call
- ☐ Lost quotes never worked at the next x-date
- ☐ Renewals with a rate increase shop before we call
- ☐ Pending cancels worked late
- ☐ Mono-line households never offered a second line
- ☐ New-policy documents chased by hand
- ☐ Missed calls after hours

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 → Quoted → Follow-Up → Bound → Lost (hold to x-date) → Renewal
Side lanes: X-Date Hold (to the next x-date, up to 12 months) · Renewal Review (60 / 45 / 30 days) · Pending Cancel / Non-Pay · Account Rounding (mono-line households) · Claims Check-In

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

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

Do you capture the x-date on every prospect and lost quote today? ☐ Yes ☐ No

Is the pending-cancel list worked the same day it downloads? ☐ Yes ☐ No

Do new clients get a post-bind welcome with ID cards and next steps automatically? ☐ 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

- ☐ Mortgage loan officers
- ☐ Realtors
- ☐ Title / escrow
- ☐ Auto dealers and F&I offices
- ☐ CPAs and attorneys
- ☐ Financial advisors
- ☐ Other agents
- ☐ Life BGA
- ☐ Property managers
- ☐ Community / business associations

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. Mortgage LOs, realtors and title partners are RESPA-covered for lender-required homeowners insurance, so they receive no money and no gifts that track referrals; what they get is a referral portal, fast status back to the LO and reciprocal referrals. Where your state allows it, an unlicensed referrer may be paid a flat fee that does not depend on whether the policy binds (Florida bars any fee contingent on a purchase). Partner appreciation stays under the lowest gift cap among your licensed states and is offered to all partners equally.

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 application
- ☐ Prior declarations page
- ☐ Proof of prior insurance
- ☐ Photos / inspection
- ☐ EFT / payment authorization
- ☐ Mortgagee clause / lender information
- ☐ Driver list and vehicle details
- ☐ Signed coverage rejection forms (e.g. UM/UIM)
- ☐ Scope of appointment (Medicare, 48 hours before the meeting)
- ☐ Loss runs (commercial)

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Post-bind welcome with ID cards and app download
- ☐ Review request
- ☐ Referral ask (post-bind, post-claim, post-review)
- ☐ Birthday / policy anniversary touch
- ☐ Annual account review
- ☐ Account-rounding offer
- ☐ Life anniversary / term-conversion reminder
- ☐ 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?
Answering / calling back new leads				☐
Chasing open quotes				☐
Tracking and working x-dates				☐
Renewal review outreach (60 / 45 / 30 days)				☐
Remarketing renewals with rate increases				☐
Working the pending-cancel / non-pay list				☐
Cross-sell and account rounding				☐
Claims check-ins				☐
Life anniversaries and term-conversion reminders				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Chasing signed apps, dec pages, photos and EFT forms				☐
Sending ID cards and post-bind welcomes				☐
Referral asks and review requests				☐
Returning missed calls				☐
Birthday, holiday and appreciation touches (and logging gift value)				☐
Building owner reports from the AMS				☐
Data entry between AMS, rater and CRM				☐
Database cleanup / duplicates				☐
Social media posting				☐
Chasing unpaid agency fees				☐
Figuring producer commissions				☐
				☐
				☐

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
New Business Report (policies, premium, commission)	☐			SEMI	
Retention Report (rolling 12)	☐			FULL	
Close Ratio / Quotes per Producer	☐			FULL	
Lead Source ROI / Cost per Bound Policy	☐			FULL	
Speed-to-Lead / Response Time	☐			FULL	
X-Date Pipeline Report	☐			FULL	
Renewal Review List (60 / 45 / 30)	☐			FULL	
Rate-Increase Remarketing List	☐			SEMI	
Pending Cancel / Saves Report	☐			FULL	
Account Rounding / Mono-Line Report	☐			FULL	
Claims Check-In Log	☐			FULL	
Producer Scorecard	☐			FULL	
Gift / Appreciation Value Log	☐			FULL	
Compliance Log (consent, DNC, license footers)	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Commission Statement Reconciliation	☐			ASSIST	
Carrier Production / Contingency Tracking	☐			ASSIST	
Producer commission statement	☐			FULL	
Agency-billed fees overdue	☐			FULL	
	☐			--	
	☐			--	

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

Think: Monday pending-cancel huddle, Friday quote review, monthly retention meeting, carrier download checks, license and CE renewals, Medicare AEP preparation, E&O review, commission statement reconciliation.

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 an insurance agency: Launch covers a sub-60-second reply and missed-call text-back on every lead, round robin to producers, booking calendars, the 7-day quote sequence, review requests after bind and after a claim, consent capture with certificates retained, DNC scrub, license-number footers and free-text opt-out recognition, A2P registration prepared, and the weekly funnel report; Growth adds the Renewal & Retention Engine (x-date pipeline, 60/45/30 renewal cadence with remarketing flags, pending-cancel save flow, account rounding, claims check-ins, carrier document chase, life anniversary and term-conversion reminders, compliance-safe appreciation, post-bind welcome and the owner dashboard), the after-hours assistant, per-producer pages and owned-list re-activation; Full Engine adds the partner program with a separate no-fee program for RESPA-covered partners, lanes for mortgage, real estate, dealers, CPAs and other agents, producer recruiting, the operating-rhythm automations and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE — The Renewal & Retention Engine

- X-Date Pipeline: an expiration date captured at first contact on every prospect and lost quote, with outreach at 60, 45 and 30 days
- Renewal Review Cadence: renewal texts and emails with a booking link at 60, 45 and 30 days, with rate-increase accounts flagged for remarketing
- Pending-Cancel Save Flow: the non-pay list becomes a same-day text with a payment link, a CSR call task and a 3-touch save sequence
- Account-Rounding Sequences: mono-line auto, mono-line home, no-umbrella and no-life households each get a 90-day nurture with a quick-quote path
- Claims Check-In and Post-Claim Review Ask: a we're-here text, 7-day and close-out check-ins, then a review request
- Carrier Document Chase: a per-client checklist with 48-hour escalating reminders and a live staff board
- Life Anniversary and Term-Conversion Reminders: annual review invitations and conversion-deadline alerts that open a review booking
- Compliance-Safe Client Appreciation: birthday, anniversary and holiday touches with gift value logged against your lowest state cap
- Post-Bind Welcome: what to expect, ID cards, app download, EFT setup and the mortgagee step, then a review request
- Owner Dashboard: rolling-12 retention, close ratio, quotes per producer, source ROI and pending cancels saved

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	–	●	●
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	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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 Renewal & Retention Engine	X-Date Pipeline; Renewal Review Cadence; Pending-Cancel Save Flow; Account-Rounding Sequences; Claims Check-In and Post-Claim Review Ask; Carrier Document Chase; Life Anniversary and Term-Conversion Reminders; Compliance-Safe Client Appreciation; Post-Bind Welcome; Owner Dashboard	–	●	●
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 producer.	–	●	●
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: agency-billed fees only.	–	●	●
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: producer commissions.	–	–	●
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**	

QUOTE IT?	ADD-ON	FEE	NOTE
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

- ☐ Instant text + email to every new lead in under 60 seconds, round-robined to a producer with a claim window `[L]`
- ☐ Missed-call text-back with a booking link `[L]`
- ☐ Booking calendars per producer with confirmations and reminders `[L]`
- ☐ Lead-source tagging so cost per bound policy by source is arithmetic `[L]`
- ☐ Quote-form consent with timestamp, and lead-vendor consent certificates retained `[L]`
- ☐ After-hours assistant that captures line, x-date and current carrier and books; it never quotes a premium or confirms coverage `[G]`

QUOTES & X-DATES

- ☐ 7-day quote sequence once a quote is out, with a call task at 48 hours, stopping on reply `[L]`
- ☐ X-date pipeline: expiration date captured at first contact, outreach at 60, 45 and 30 days `[G]`
- ☐ Lost quotes held to the next x-date with one touch per quarter `[G]`
- ☐ Owned-list re-activation of old leads and past clients (ramped, bounce-guarded, auto-unsubscribe) `[G]`
- ☐ Per-producer landing pages and QR cards `[G]`

RENEWALS & RETENTION

- ☐ Renewal review cadence at 60/45/30 days with a booking link `[G]`
- ☐ Rate-increase remarketing flag with an automatic document request `[G]`
- ☐ Pending-cancel save flow: same-day text with payment link, CSR call task, 3-touch sequence `[G]`
- ☐ Account-rounding sequences for mono-line auto, mono-line home, no-umbrella and no-life households `[G]`
- ☐ Life anniversary and term-conversion reminders that open a review booking `[G]`
- ☐ Compliance-safe appreciation: birthday, anniversary and holiday touches with gift value logged against your lowest state cap `[G]`

SERVICE & ONBOARDING

- ☐ Post-bind welcome: what to expect, ID cards, app download, EFT setup, mortgagee step `[G]`
- ☐ Carrier document chase with a live board and 48-hour escalating reminders `[G]`
- ☐ Claims check-in: we're-here, 7-day and close-out touches `[G]`
- ☐ Referral asks at post-bind, post-claim and post-review, with a tracked link `[G]`
- ☐ Review request after bind and after a claim, sent to every client `[L]`

PARTNERS & GROWTH

- ☐ Partner program with tracked links and attribution for LOs, realtors, dealers, CPAs and other agents `[F]`
- ☐ Separate no-fee program for RESPA-covered partners: referral portal and fast status back to the LO `[F]`
- ☐ Monthly partner statements showing referrals and status, never a payout tied to binds `[F]`
- ☐ Partner outreach campaign with the no-fee copy variant `[F]`
- ☐ Producer recruiting funnel `[F]`

COMMAND & CONTROL

- ☐ Daily recap and weekly funnel report `[L]`
- ☐ Owner dashboard and full Monday report: retention, close ratio, quotes per producer, source ROI, pending cancels saved `[G]`

- ☐ Compliance shell: DNC scrub, license-number footers, free-text opt-out recognition, quiet hours [L]
- ☐ A2P 10DLC registration prepared with your consent wording and STOP/HELP disclosures [L]
- ☐ Operating-rhythm automations: Monday pending-cancel huddle, Friday quote review, monthly retention meeting [F]
- ☐ AMS integration beyond the standard bound-client push [+]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever the agency still does by hand [F]

MONEY DESK

- ☐ Owner-routed onboarding: every new client gets the welcome from their own producer – the producer's name, email and own sign-up link – so the file lands in that producer's queue; one message per client, never duplicates [G]
- ☐ Secure two-step sign-up: Driver's license numbers, VINs, prior policies and bank details never by email; the welcome sends them to a secure form that files it straight into your system of record [G]
- ☐ Billing that runs itself for agency-billed fees only: 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]
- ☐ Commission ledger for producer commissions: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per producer and a 'needs attention' list [F]
- ☐ Moving your payment processor, included at no charge: every paying client 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 for marketing texts
- ☐ Revocation by any reasonable means, including free-text opt-outs, honored across all channels
- ☐ National and internal Do-Not-Call scrub
- ☐ Quiet hours of 8am-9pm recipient local time (8pm in Florida)
- ☐ State mini-TCPA rules (e.g. Florida FTSA)
- ☐ License number on emails and ads (California: every email involving licensable activity, matching type size)
- ☐ Anti-rebating law and state gift caps
- ☐ RESPA Section 8 for mortgage, realtor and title partners
- ☐ GLBA / NAIC Model 668 data security (MFA, written information security program)
- ☐ Life replacement and illustration rules
- ☐ CMS Medicare rules: permission to contact, scope of appointment 48 hours before, TPMO disclaimer
- ☐ Captive carrier brand and compliance review

Other:

Is the team currently allowed to text clients and prospects? ☐ Yes ☐ No

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

Do you keep your lead vendors' consent certificates for 5 years? ☐ Yes ☐ No

Does your carrier (if captive) or your E&O / compliance line review marketing before it goes out? ☐ 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
- ☐ Quotes per producer
- ☐ Retention (rolling 12)
- ☐ Renewals reviewed before the x-date
- ☐ Speed to first response
- ☐ Close ratio (bind ratio)
- ☐ Pending cancels saved
- ☐ Partner referrals
- ☐ Contact rate
- ☐ Cost per bound policy by source
- ☐ Policies per household (rounding)
- ☐ Reviews

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.

- ☐ AMS export of clients, policies, x-dates and renewal dates (or API access)
- ☐ AgencyZoom or Better Agency admin (if used)
- ☐ Consent certificate accounts (TrustedForm / Jornaya)
- ☐ Facebook Business Manager + page admin
- ☐ Google Workspace / Microsoft 365 admin
- ☐ Agency and producer license numbers for footers
- ☐ Captive carrier brand and compliance review contact (if captive)
- ☐ Pending-cancel / non-pay list export path from the carrier download
- ☐ Lead vendor accounts and delivery settings (EverQuote, SmartFinancial, QuoteWizard)
- ☐ Google Business Profile manager access
- ☐ Google Ads / Local Services Ads account
- ☐ Domain registrar / DNS login
- ☐ Legal name, 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
AMS (Applied Epic, EZLynx, HawkSoft, AMS360)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
AgencyZoom	agencyzoom.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Better Agency	betteragency.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Comparative rater (EZLynx Rater, TurboRater)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
IVANS	ivans.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Progressive agent portal (ForAgentsOnly)	foragentsonly.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Other appointed carrier portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Captive carrier agent system (State Farm, Allstate, Farr		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
EverQuote	everquote.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
SmartFinancial	smartfinancial.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
QuoteWizard	quotewizard.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
TrustedForm (ActiveProspect)	activeprospect.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
NIPR (licensing)	nipr.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
State Department of Insurance portal		☐ 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	
Google Ads / Local Services 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			