Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Insurance Agency

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 Renewal & Retention 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 12 The agency

The basics about the agency so we set up the account and footers correctly. If you are captive, your carrier has its own brand and compliance review, so we need that contact too.

Legal name and DBA

Independent, cluster or captive (carrier)
If captive, name the carrier. If in a cluster or aggregator, name it.

Lines: personal, commercial, life, health, Medicare

States licensed in

Commission book size and PIF
Annual commission revenue and policies in force. Round numbers are fine.

Principal, producers, CSRs, account managers

- [ ] Retention rate (rolling 12) known
- [ ] Captive brand and compliance review contact named

SECTION 2 OF 12 Producers and CSRs

Everyone who takes leads or services accounts. We use this for the round-robin, the calendars and the license numbers in email footers. The claim window is how long a producer has to grab a new lead before it moves to the next person.

Producers and CSRs — name, license, cell and email, one per line

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

Who works pending cancels
The person who calls clients whose policy is about to cancel for non-payment.

- [ ] Each producer has a booking calendar
- [ ] License numbers ready for footers

SECTION 3 OF 12

Systems

The software the agency already runs. We push bound clients into your management system and pull the pending-cancel list from it, so we need to know how that data moves today.

AMS (Applied Epic, EZLynx, HawkSoft, AgencyZoom, Better Agency)

Rater

Carrier download via IVANS

Yes or no. This is the nightly policy data feed from carriers into your AMS.

Payment link provider

- [ ] Bound-client push into the AMS agreed
- [ ] Pending-cancel list export path agreed

SECTION 4 OF 12

Lead sources

Where leads come from and what each source costs a month. Purchased internet leads come with consent certificates that must be kept for five years, and some carrier contracts forbid shared-consent leads, so we check both.

Shared lead vendors and monthly spend

EverQuote, SmartFinancial, QuoteWizard and so on, with monthly spend for each.

Exclusive leads and live transfers

Google, LSA and Meta spend

Referral and partner volume

- [ ] TrustedForm or Jornaya certificates retained 5 years
- [ ] Carrier appointment contracts checked for shared-consent prohibitions
- [ ] Source tag list confirmed

SECTION 5 OF 12

Pipeline and quote sequence

We ship a standard set of stages you can rename, plus a follow-up sequence after a quote goes out. Automated messages never state a premium or a discount and never confirm coverage before the policy is bound.

Confirm or rename each stage

Quote sequence timing

How often to follow up after a quote, for example day 1, 3, 7, 14.

Lost-quote hold rule

How long a lost quote sits before we reach out again, usually until 60 days before their renewal.

- [ ] No premium, rate or discount figure in any automated message
- [ ] No coverage confirmation before bind

SECTION 6 OF 12

Renewals and x-dates

This drives renewal outreach and expiration-date prospecting. An x-date is the day a prospect's current policy renews; we capture it at first contact and start outreach ahead of it. Renewal touches have to land before the carrier's notice does.

Renewal cadence days (60/45/30)

Rate-increase threshold for remarketing

The renewal increase that triggers shopping the account, for example 10 percent.

X-date capture fields

Document request list for remarketing

- [ ] Renewal notice timing by carrier and state known, so outreach lands first

SECTION 7 OF 12

Rounding and life

Rounding means adding lines to a household that only has one policy with you. Tell us how many single-line households you have and how life and umbrella referrals work today.

Mono-line household counts by type

Umbrella and life referral path (in-house or BGA)

Whether a producer writes it or it goes to a brokerage general agency. Name the BGA if so.

Life carriers requiring ad pre-approval

- [ ] Life content is need-based and carrier-agnostic
- [ ] No replacement or illustration language

SECTION 8 OF 12

Appreciation and gifts

States cap what an agent can give a client or prospect, and the lowest cap among your licensed states applies to everything. Tell us what you do today so the system logs gift value against that cap.

States licensed in and the lowest gift cap among them

For example: TX, FL, GA; lowest cap $25. If unsure, list the states and we will look it up.

Current gift and event practices

- [ ] Per-person gift value logged against the cap
- [ ] Offers available to everyone in a class
- [ ] No quote-to-enter drawings

SECTION 9 OF 12

Partners

Who sends you referrals. Mortgage and real estate partners fall under RESPA and receive nothing of value. Unlicensed referrers may get a small flat fee where your state allows it, never tied to whether the policy binds.

Mortgage LOs and realtors (RESPA-covered)

Dealers and F&I contacts

CPAs, attorneys, advisors

Other agents and BGA

Referral fee amount for unlicensed referrers, if any

A flat dollar amount per referral, if your state allows it. Write 'none' if you do not pay.

- [ ] Partner signs the no-discussion-of-terms one-pager
- [ ] Statements show status, never payouts tied to binds
- [ ] RESPA-covered partners receive zero dollars

SECTION 10 OF 12 Medicare (if sold)

Skip this if you do not sell Medicare. Medicare marketing has its own rules: a signed scope of appointment before any plan talk, a required disclaimer on all materials, and call recordings kept for ten years.

Plans and organizations represented

Scope of appointment process

How you get the SOA signed today: e-sign, paper, recorded call.

Call recording retention

- [ ] No automated plan pitching
- [ ] TPMO disclaimer on all materials
- [ ] No contact without permission to contact

SECTION 11 OF 12 Compliance and privacy

Who reviews templates and who owns your written information security program. Nothing goes live before the week-one compliance review, every user gets MFA, and SSNs and license numbers never travel by text.

E&O carrier or association compliance line

Written information security program owner

The person responsible for your data security plan. Many states require one to be named.

Template reviewer

- [ ] Compliance review booked in week one
- [ ] MFA on all users
- [ ] No SSNs or full DL numbers in SMS
- [ ] Data-processing addendum signed
- [ ] Access removed the day a CSR leaves

SECTION 12 OF 12

Phone, texting and reporting

What we need to set up your tracked number, register it for texting and schedule the reports. The consent wording on your forms has to match the registration, so paste it exactly.

Tracked number

Privacy policy URL and consent checkbox wording

Monday huddle and Friday quote review times

The two standing meetings the reports are timed to. For example: Monday 8:30am, Friday 3pm.

Report recipients

- [ ] A2P registration shows consent wording and STOP/HELP
- [ ] Retention, close ratio, quotes per producer and source ROI wanted

THE NEVER-LIST FOR INDEPENDENT AND CAPTIVE INSURANCE AGENCIES

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.

- [ ] Any specific premium, rate, discount or you'll-save-$X not from an actual quote; any guaranteed rate or life illustration value.
- [ ] Rebates, cash, gift cards or anything of value for buying or quoting; referral bounties when they buy.
- [ ] Coverage confirmations, binders or you're-covered before the carrier binds; any statement that a claim will be paid.
- [ ] Carrier names or logos without appointment, and without carrier approval for life and Medicare.
- [ ] Health, claims, SSN, driver's license or policy-number details over SMS.
- [ ] Comparative statements about a competitor's policy or a prospect's existing life policy (replacement rules); swap-your-old-policy language.
- [ ] Marketing to anyone without documented consent or after any form of revocation; marketing texts outside 8am to 9pm recipient local time (8pm in Florida).
- [ ] For Medicare: any plan benefit content, the word free, or contact without permission to contact and a scope of appointment.
- [ ] Any payment, gift or expense pick-up for a mortgage LO, realtor or title partner tied to homeowners referrals.

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.