BUSINESS AUTOMATION FOR INDEPENDENT AND CAPTIVE INSURANCE AGENCIES

# Every quote chased. Every x-date worked. Every renewal touched 60 days out.

**Everborn Productions**
Chris Magee
everbornproductions@gmail.com
(916) 541-3415

A system that answers the lead in seconds instead of 20 hours, runs the renewal review cadence, saves the pending cancels, and rounds the mono-line households.

## THE RENEWAL & RETENTION ENGINE · INCLUDED IN GROWTH

### X-Date Pipeline
Every prospect and lost quote gets an expiration date captured at first contact and becomes a dated pipeline.

### Renewal Review Cadence
Renewal texts and emails with a booking link at 60, 45 and 30 days pre-renewal on every policy.

### Pending-Cancel Save Flow
The non-pay and pending-cancel list from the carrier download becomes a same-day text with a payment link, a CSR call task and a 3-touch save sequence until reinstated or cancelled. Today that list is worked whenever someone gets to it.

### Account-Rounding Sequences
Mono-line auto, mono-line home, no-umbrella and no-life households each get a tagged 90-day nurture with a quick-quote reply path. Rounding one line onto 100 mono-line households is new recurring revenue with no lead cost.

### Claims Check-In and Post-Claim Review Ask
Claim opened triggers a we're-here text, then 7-day and close-out check-ins, then a review request on close. The CSR handles only substantive questions.

## A NEW LEAD'S FIRST HOUR, AFTER THE BUILD

| | |
|---|---|
| 0:00 | Lead submits a form, landing page or QR card — lands in the pipeline, tagged by source |
| 0:01 | Instant text and email go out under your brand |
| 0:01 | Round-robin assigns the next person and notifies them |
| 0:15 | Nobody called? Reminder fires, and the owner sees it Monday |
| Day 1–5 | No reply? A short follow-up drip runs, then stops |
| Sold | Onboarding kicks off on its own, and The Renewal & Retention Engine takes over |

### Also in the engine
Carrier Document Chase; Life Anniversary and Term-Conversion Reminders; Compliance-Safe Client Appreciation; Post-Bind Welcome; Owner Dashboard.

## PACKAGES · ONE-TIME BUILD, THEN FLAT MONTHLY WITH THE PLATFORM INCLUDED, MONTH TO MONTH AFTER 90 DAYS

### Launch
$3,500
then $697 / month
- Tracked number, domain and email
- Pipelines in your team's language
- Lead capture with written consent
- Reply in under 60 seconds
- Round-robin with a claim window
- Missed-call text-back

### Growth
$6,500
then $1,197 / month
- **Everything in Launch, plus**
- Branded email templates
- Client onboarding
- Invoicing and payment links
- Document and signature chase
- **The Renewal & Retention Engine**

### Full Engine
$9,500
then $1,697 / month
- **Everything in Growth, plus**
- Referral partner program
- Printable partner materials
- Monthly partner statements
- Partner outreach campaign
- Monthly think-tank: custom automations for your team's daily tasks

### Every point of retention on a $1.2M book is $12,000 a year, recurring

Your book bleeds 12 to 16 points a year, your leads sit for a day before anyone calls, and your CSRs spend a third of their week doing things a workflow can do. **Built and running today:** Snap Credit Fix, a California credit repair company, runs on a system I built for them. It answers leads in under a minute, runs a dealer referral program with QR counter cards and automated monthly statements, and sends a Monday report the president reads first.

NEXT STEP

## Book a 20-minute build call.

Email everbornproductions@gmail.com or call (916) 541-3415 with your business name and website. You'll get a one-page brief and a fixed quote within two business days.

Same three prices in every industry, quoted for one location and up to five reps; larger teams are scoped in the brief. Platform included; ad spend and carrier fees billed at cost. Own your platform account already? Take $197 off each monthly. Regulated industries get a compliance review in week one at no charge. Independent builder and platform licensee. Results vary.