

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

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 — leads answered in under a minute, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with QR counter cards and automated monthly statements, and 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.