Everborn Productions

THE RECURRING WORK AUTOMATION REMOVES

What we take off your plate.

Insurance Agency

Every business has a set of tasks that repeat forever. None of them are hard. All of them have to happen. And every one competes with the work that actually earns money.

Your book bleeds 12 to 16 points a year at the industry-average 84% retention, your internet leads sit for about a day before anyone calls, and your CSRs spend roughly a third of their week on renewal touches, pending-cancel calls, document chasing and ID-card requests. Only 20% of auto shoppers with a home were even offered a home quote, so the rounding gap is systemic, not a people problem.

Chris Magee · Everborn Productions
everbornproductions@gmail.com · (916) 541-3415
September 2026

BY INDUSTRY · INSURANCE AGENCY

The Renewal & Retention Engine

X-dates, renewals, pending cancels and rounding, inside the anti-rebating lines

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
New-lead first touch	Every lead	Full	Text and email under 60 seconds, round-robined to a producer; the 20-plus-hour average response collapses to seconds.
Chasing the quote	Daily per open quote	Partial	A 7-day stop-on-reply sequence replaces the sticky-note callback; the producer steps in on a reply or the call task.
X-date tracking	Monthly pull, daily touches	Full	X-dates become a dated pipeline with outreach 60 days before the prospect's renewal.
Renewal review outreach	60/45/30 days pre-renewal	Partial	Renewal texts and booking links go out on schedule; the CSR reviews only rate-jump accounts and replies.
Remarketing at renewal	Per renewal with rate increase	Partial	Triggered task and document request above a threshold; the re-quote stays human.
Cross-sell and account rounding	Ongoing	Full	Mono-line households get a tagged nurture instead of never being asked.
Pending-cancel saves	Daily from carrier download	Partial	Same-day text with a payment link and a call task instead of whenever someone gets to the list.
Claims check-in	Per claim	Partial	We're-here, 7-day and close-out touches, then a review request; the CSR handles substantive questions.
Life anniversaries and term conversions	Annual per policy	Full	Reminders go out automatically and open a review booking.
Referral asks	Post-bind, post-claim, post-review	Full	The ask goes out at the three moments people actually refer, with a tracked link.
Carrier document chase	Per new policy	Partial	Live checklist per client with 48-hour escalating reminders; staff see one board.
Post-bind welcome and onboarding	Per bound policy	Full	Welcome, payment setup and review request replace the did-we-send-the-cards question.
Missed-call handling	Daily	Full	Missed-call text-back and the after-hours assistant capture the caller and book.
Owner reporting	Weekly / monthly	Full	One weekly funnel report and monthly business report replace the AMS export ritual.

BY INDUSTRY · INSURANCE AGENCY

Continued

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Owner-routed onboarding	Per new client	Full	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. (Growth and up.)
Secure two-step sign-up	Per new client	Full	Clients never email sensitive data. The welcome sends them to a secure form that files everything directly into the system of record, and the email says plainly: don't email this to us. (Growth and up.)
Billing that runs itself	Per invoice	Full	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. (Growth and up.)
Commission ledger	Monthly	Full	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. (Full Engine.)
Moving your payment processor	One time, when needed	Partial	Every paying client moved off a processor that closed or is being replaced: new payment links or card-on-file, old invoices cancelled only after payment clears, so nobody is double-charged or dropped. Included at no charge. (Every package, included at no charge.)
Typical reclaim	**10-14 hours a week per CSR** — mostly the renewal touches, the pending-cancel list and the document chase		

THE NUMBER IN THE ROOM

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

Industry average retention is about 84%; strong agencies run 90 to 92% (Agency Performance Partners). Buyers discount books below 88% and pay a premium above 93% (QuoteSweep). Moving from 86% to 91% adds about $60,000 a year of retained revenue on that book. Full Engine is $20,364 a year after the build. The per-point dollar figure is our arithmetic on an illustrative book.

WHATEVER THE INDUSTRY

The work that stops being yours.

Not features. Tasks — the ones currently done by you, done badly by someone else, or not done at all.

Every new lead

- Answered within seconds by text and email, day or night
- Assigned to the right person automatically
- Every missed call texted back
- The quiet ones chased on a schedule that doesn't annoy them
- The appointment booked without a phone-tag loop

Your existing list

- Old leads re-activated after being written off
- Anyone who re-engages detected and routed to a human
- A long-term nurture running in the background
- Unsubscribes and bounces handled automatically
- The list kept clean and deliverable

Clients in progress

- Onboarding sequence and document collection
- Status updates so nobody has to ask
- Invoices and payment links
- Review requests at the right moment
- Referral asks after a win

Partners and referral sources

- Tagged links so every referral is credited automatically
- Printable materials for their counter or desk
- Monthly statements sent without you touching them
- Recruitment outreach to bring on more partners

YOU, ON MONDAY MORNING

One email with the numbers that matter: what came in and from where, what closed, what stalled, how the campaigns did, which partners sent business, and what got built or fixed that week. Plus a dashboard you can open on your phone. Written for an owner, not a technician.