WHAT YOU ARE GETTING

The build, itemized.

Insurance Agency

Not a feature brochure. Every line below is something that exists and works when the four weeks are done, and that you can open in your own account and see.

Each package is cumulative. Growth includes all of Launch. Full Engine includes all of Growth. The prices are the same in every industry; what is inside them is built for independent and captive insurance agencies.

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Launch

Foundation, plus every lead answered fast. For a small team whose main leak is response time and follow-up.

BUILD FEE	MONTHLY
$3,500	$697
one time	includes the platform

DELIVERED

- **Tracked number, domain and email.** A tracked local number, your domain and professional email on your own identity, with call routing and recording.
- **Pipelines in your team's language.** CRM pipelines and stages named the way your team actually talks.
- **Lead capture with written consent.** A lead-capture page and forms that record written consent to call and text, with a privacy link, on every entry point.
- **Reply in under 60 seconds.** A reply to every new inquiry in under 60 seconds, by text and email, that stops the moment they answer.
- **Round-robin with a claim window.** Round-robin assignment with a claim window and automatic reassignment, so no lead sits with someone who is off.
- **Missed-call text-back.** Missed-call text-back with a booking link.
- **Booking calendars.** Booking calendars per person with confirmation and reminder sequences.
- **5-day follow-up drip.** A 5-day follow-up drip that stops instantly on any reply or opt-out.
- **Lead-source tagging.** Lead-source tagging at entry on every channel, so cost per sale by source is measurable from day one.
- **Review requests.** A review request at the right moment after the sale or visit, sent to everyone, never filtered by sentiment.
- **Business texting registration.** A2P 10DLC brand and campaign registration prepared with sample messages that match your consent language.
- **Compliance shell.** Consent records with timestamps, STOP and any-reasonable-means opt-outs honored across every channel and workflow, quiet hours, the required footers and identifiers, and a blocked-phrase list applied to every template.
- **Daily recap and weekly funnel report.** Daily recap and a weekly funnel report to the owner.
- **Handoff booklet and training.** A handoff booklet with screenshots of every system, and team training.

BUILT FOR INDEPENDENT AND CAPTIVE INSURANCE AGENCIES

PIPELINE STAGES

New Lead → Contacted → Quoted → Follow-Up → Bound → Lost (hold to x-date) → Renewal

- **Pipeline stages in agency language:** New Lead, Contacted, Quoted, Follow-Up, Bound, Lost (hold to x-date), plus a Renewal lane.
- Web form with prior-express-written-consent language and a TrustedForm-style timestamp; lead-buyer consent certificates retained at least 5 years per lead.
- The 5-day drip becomes a 7-day quote sequence once a quote is out (T+0, +2h, +24h, +48h call task, +72h, +5d, +7d CSR review), stop on reply.
- **Source tags:** EverQuote, SmartFinancial, QuoteWizard, referral, Google, Meta, mortgage partner, realtor partner.
- Review request fires post-bind and post-claim.
- Compliance shell adds DNC scrub (national and internal), license-number footers where required (California requires it on every email involving licensable activity at matching type size), and free-text revocation recognition, not just STOP.
- **A2P 10DLC:** carriers reject insurance brands without clear opt-in language on the form and a privacy policy; the registration shows the consent checkbox wording and STOP/HELP disclosures.
- **For captives:** no carrier marks in the funnel, no competing domain, all copy submitted to the carrier's brand and compliance review before launch.

Growth

Everything in Launch, plus onboarding, retention, database re-activation, the full Monday report and your industry engine. The package most businesses land on.

BUILD FEE	MONTHLY
$6,500	$1,197
one time	includes the platform

DELIVERED — EVERYTHING IN LAUNCH, PLUS

- **Branded email templates.** Branded email templates with your identifiers locked in.
- **Client onboarding.** Client onboarding on "Sold": welcome, what-happens-next, document request with secure upload links, e-sign, payment link. Never asks for sensitive data by email reply.
- **Invoicing and payment links.** Invoicing and payment links with reminders until paid.
- **Document and signature chase.** Document and signature chase with a live staff checklist showing who owes what and how long it has been outstanding.
- **Long-term nurture.** Long-term nurture sized to your buying cycle, kept separate from the 5-day drip, with a re-engagement detector that moves anyone who responds back to the front of the pipeline with an alert.
- **Owned-list re-activation.** Owned-list re-activation: a ramped, bounce-guarded campaign against every old lead and past customer you already paid for.
- **Retention program.** A retention program for existing customers: anniversaries, check-ins, renewals, and the save flow when someone tries to leave.
- **Per-rep pages and QR cards.** Per-rep landing pages and QR cards, each feeding the same pipeline with attribution to the rep.
- **After-hours AI assistant.** An after-hours AI assistant that answers, qualifies and books, fenced by your industry's never-list.
- **Full weekly owner's report.** The full weekly owner's report, written as what the business accomplished, never a task log.
- **Live dashboard and command center.** A live dashboard and an owner's command center: one screen instead of four logins, showing this week's recurring tasks with tick-off, a green, amber or red light on every system, the documents and logins in one place, and a fix-it runbook for when something breaks.
- Long-term nurture parks lost quotes to the next x-date (up to 12 months) with one touch per quarter, then 60/45/30-day re-engagement; life gets a 90-day education drip after a P&C bind, then annual.
- Client onboarding is the post-bind welcome sequence.
- Per-producer landing pages and QR cards.
- The after-hours AI assistant captures, qualifies (line, x-date, current carrier) and books; it never quotes a premium or confirms coverage.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The Renewal & Retention Engine

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

X-Date Pipeline

Every prospect and lost quote gets an expiration date captured at first contact and becomes a dated pipeline. Outreach fires 60, 45 and 30 days out, ahead of the carrier's renewal notice, and the we-quoted-you-last-year win-back runs at the next x-date.

Renewal Review Cadence

Renewal texts and emails with a booking link at 60, 45 and 30 days pre-renewal on every policy. Accounts with a rate increase above the owner's threshold are flagged for remarketing and get a document request automatically; the CSR only reviews the flagged accounts and the replies.

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.

Carrier Document Chase

A per-client checklist (signed app, prior dec page, photos, inspection, EFT form, proof of prior) with reminders escalating every 48 hours until the item lands, and a live staff board of what is outstanding.

Life Anniversary and Term-Conversion Reminders

Annual review invitations and conversion-deadline alerts open a review booking automatically. Nothing in most P&C AMS systems does this for life today. Content stays need-based and carrier-agnostic.

Compliance-Safe Client Appreciation

Birthday, anniversary and holiday touches with per-person gift-value logging against the lowest state cap the agency is licensed in, offered to everyone in a class, never tied to buying or quoting.

Post-Bind Welcome

A welcome sequence with what to expect, ID cards, app download, EFT setup and the mortgagee step, then a review request, replacing the did-we-send-them-their-cards question.

Owner Dashboard

Rolling-12 retention, close ratio, quotes per producer, source ROI and pending cancels saved, replacing the export-from-the-AMS-and-build-a-spreadsheet ritual.

Full Engine

Everything in Growth, plus the referral-partner program, full operations, and a monthly think-tank that keeps finding the next thing to take off your team's plate.

BUILD FEE	MONTHLY
$9,500	$1,697
one time	includes the platform

DELIVERED — EVERYTHING IN GROWTH, PLUS

- **Referral partner program.** A referral partner program with a tracked link and printed QR card per partner and automatic attribution written at lead creation.
- **Printable partner materials.** Printable partner materials: welcome packet, counter cards, one-pagers, version-numbered.
- **Monthly partner statements.** Automated monthly partner statements, with contents set by what the law allows in your industry. Where a threshold decides what appears on a statement, the system records the decision and never the figure behind it, so the sheet stays safe to share with staff.
- **Partner outreach campaign.** A partner outreach campaign to build the bench, with a no-fee copy variant wherever a fee is illegal.
- **Partner lanes.** Partner lanes: a separate pipeline and cadence per partner type.
- **Operating-rhythm automations.** Every operating-rhythm automation from the intake: huddle prep, daily lists, weekly reviews, monthly reports.
- **Internal task and alert flows.** Internal task and alert flows: unclaimed lead, stalled file, deadline at risk, negative review, manager escalation.
- **Written procedures.** Written procedures for the team's own operations.
- **Priority support.** Priority support: a named contact, a weekly twenty-minute call, same-day changes.
- **Monthly business report.** Monthly business report in addition to the weekly.
- **Handoff booklet, kept current.** The handoff booklet, kept current as the system changes.
- **Monthly automation think-tank.** A standing session every month where we sit down with you and your team, find the daily tasks eating their time, and design and build custom automations for them.

THE PART NOBODY ELSE SELLS

Monthly automation think-tank

A standing session every month where we sit down with you and your team, find the daily tasks that are eating their time, and design and build custom automations for them. Every build is documented and added to your handoff booklet. It is the reason Full Engine clients stay for years: the system keeps getting better instead of slowly going stale.

FULL ENGINE, BUILT FOR INDEPENDENT AND CAPTIVE INSURANCE AGENCIES

Partners, lanes and rhythm in your business.

- Partner program with tracked links and attribution by LO, realtor, dealer, CPA and other agent; every partner enrolled with a signed one-pager stating they will not discuss policy terms.
- Monthly partner statements show referrals received and status (quoted, bound, not a fit), never a payout tied to binds. Where a fee is paid to an unlicensed referrer it is flat and not contingent on the sale; Florida bars any fee dependent on whether the referral results in a purchase.
- RESPA-covered partners (mortgage LOs, realtors, title) get zero dollars, no gifts that track referrals, no cost defrayal. They receive service-level value: a referral portal, fast status back to the LO (binder sent to your closer), and reciprocal referrals. Lender-required homeowners insurance is treated as a settlement service.
- The RESPA-covered lane is a separate program, not a flag on the paid one: its own workbook, sign-up form and outreach sheet, with no tier, rate, owed, W-9, payment or 1099 column anywhere in them and an instruction on the sheet that none may be added. A column that does not exist cannot be filled in by a helpful staff member, and the copy says plainly in both directions that nobody is paying anybody, because the loan officer asking is the one thinking about RESPA and the anti-rebating statute.
- **Partner lanes:** mortgage, real estate, auto dealer and F&I (flat non-contingent fee or none; dealer staff may not quote), CPA and attorney (default to reciprocal referrals and co-hosted education), other agents and a life BGA under a licensed-producer commission split.
- Appreciation stays under the lowest state gift cap and is offered to all partners equally. No credit repair partner language in this vertical.
- **Recruiting funnel:** yes, for producers.
- **Operating-rhythm automations:** Monday pending-cancel huddle, Friday quote review, monthly retention meeting.
- Medicare workflows, if sold, are service and appointment logistics only: no automated plan pitching, no contact without permission to contact, scope of appointment 48 hours before a meeting.

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for independent and captive insurance agencies.
- Each monthly fee includes a **$197 platform licence** for your white-labeled workspace. One bill, no separate software vendor. If you already own your own HighLevel account, take $197 off the monthly and we build in yours.
- **Ad spend and carrier messaging fees are billed at cost.** We don't mark them up.
- The **build fee is half at signature, half on delivery.**
- **Month to month after the first 90 days.** No long contract.
- **Add-ons bought with the build are 15% less** than the same add-on later.
- **Regulated industries get a compliance review in week one at no charge.** Every template goes to your compliance officer or counsel before it goes live. We build the system and the evidence file; we do not give legal advice.
- **You own everything** — accounts, data, scripts and documents. Your contacts, pipelines, templates and documents export at any time, and the domain and sheets are registered in your name.

What we ask of you

About two hours for intake in week one, a thirty-minute review each week during the build, and one hour at handoff. After that, the only thing the system needs from your team is that they answer the leads it hands them. That one is not optional, and it is the single biggest difference between clients who get results and clients who don't.

Proof

Snap Credit Fix, a California credit repair company in one of the most regulated categories there is, runs on a system I built for them: leads answered in under a minute and assigned round-robin, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with printed QR counter cards and automated monthly statements, and a Monday report the president reads first. If it passes there, it passes in yours.