Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Solar Intake Packet

Everything we need to build your lead engine, your signed-to-PTO follow-through, your rehash lane and your Monday owner's report – the same system running at Snap Credit Fix today.

How to use this packet: fill in what you can, skip what you don't know, and we'll finish the rest together on the intake call. Type directly into the fields (works in Adobe Reader, Preview, Chrome, and most phones) or print and hand-write.

Sections 1-8 tell us who you are and how you work today. Section 9 is the monthly time audit – where your hours actually go. Section 11 shows the three packages and add-ons. Section 12 is a menu of what we can take off your plate; tick everything that sounds useful and write down your top three.

Nothing here commits you to anything. It becomes your one-page Client Brief and a fixed quote within two business days. **Return this packet through a secure upload link, not by email.**

COMPANY

YOUR NAME

DATE

EVERBORN CONTACT

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

1. Company Basics

Legal company name (exactly as on your W-9)

DBA / brand name

Main phone

Main email

Website

Office address (city, state, zip)

Contractor license number(s) and classification(s) (e.g. CSLB C-46 / C-10)

States and license numbers for each state sold in

Texas TDLR residential solar retailer registration number (if selling in Texas)

Year founded

Utilities / service territories you sell in (e.g. PG&E, SCE, SDG&E, Oncor)

Installer(s) or EPC(s) you sell for, or "we install in-house"

Sales offices / territories

Company type

- ☐ Sales dealer (we sell, a partner installs)
- ☐ Installer with in-house sales floor
- ☐ EPC / installer selling through dealers
- ☐ Long-term-owner / TPO channel partner
- ☐ Solar + roofing company
- ☐ Solar + storage / electrical contractor
- ☐ Light commercial solar
- ☐ Other

Other:

Systems and services you actively sell

- ☐ Residential solar (cash)
- ☐ Residential solar (loan)
- ☐ Lease
- ☐ PPA
- ☐ Prepaid lease / PPA
- ☐ Battery storage (add-on)
- ☐ Storage-only / backup retrofit
- ☐ Main panel upgrade (MPU)
- ☐ Re-roof with solar
- ☐ EV charger installation
- ☐ Light commercial solar
- ☐ Energy-efficiency add-ons (insulation, HVAC, smart thermostat)
- ☐ System monitoring / service plans
- ☐ Removal and reinstall (R&R)

Other:

Signed deals per month (avg)

Average system size (kW) and average contract value

Average days from signature to PTO

12-month signed-deal or install goal

In one or two sentences, who is your ideal homeowner (roof, utility, bill, ownership preference) and why do they sign with you instead of the next dealer at the door?

2. Your Team

Everyone who touches a lead, a customer, or a partner. We use this to set up users, round-robin, calendars, and the Monday report.

NAME	ROLE (Owner / Sales manager / regional manager / Closer / energy consultant / Setter / canvasser / Operations / project coordinator / Permit and interconnection coordinator / Customer care)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐
					☐

NAME	ROLE (Owner / Sales manager / regional manager / Closer / energy consultant / Setter / canvasser / Operations / project coordinator / Permit and interconnection coordinator / Customer care)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

How are new leads assigned today?

☐ Setter books for a specific closer
☐ Round robin to closers (by rule)
☐ By territory / zip
☐ Owner or sales manager assigns
☐ Each rep works only self-gen
☐ Whoever grabs it first

Other:

What is the one thing about how the team works that you would NOT want an automated system to change?

3. Brand & Voice

So every text, email, page, and printout sounds and looks like you from day one.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

☐ Logo (PNG/SVG, light + dark)
☐ Rep headshots
☐ Existing proposal template
☐ Install photos and project gallery
☐ Video testimonials
☐ Door hangers / leave-behinds
☐ Yard signs
☐ Existing landing pages

Other:

Google Business Profile link

Review links (Google Business Profile / EnergySage / Yelp / BBB / SolarReviews / Facebook)

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

☐ Warm & plain-spoken
☐ Professional
☐ High-energy
☐ Educational / advisor
☐ Bilingual (specify)

Other:

Required disclosure line(s) for all marketing (e.g. 'ABC Solar, Inc. – CSLB Lic. #1234567 (C-46, C-10) – TX TDLR Reg. #________') – paste it exactly

Paste the exact license and registration line that must appear on every page, email footer and card.

Anything we must NEVER say or promise? (e.g. "30% tax credit", "free solar", "government program", "eliminate your bill", savings percentages, "as low as $X a month", "$0 down", utility affiliation, "your contract is final")

4. Current Tools & Access

List what you use now. We will decide together what gets replaced, connected, or left alone. 'Cost' can be a guess.
K = keep · R = replace with the new system · C = connect / integrate · ? = not sure

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / texting (RingCentral, Dialpad, personal cells)				
Email hosting (Google Workspace / Microsoft 365)				
Domain registrar & DNS				
Website host / builder				
CRM (Salesforce, HubSpot, JobNimbus, GoHighLevel, other)				
Sales platform (Enerflo, Solo, other)				
Design and proposal (Aurora Solar, OpenSolar, Aerialytic)				
Canvassing app (SalesRabbit, Spotio, other)				
Loan lenders (GoodLeap, Sunlight Financial, other)				
Lease / PPA providers (Palmetto LightReach, other)				
E-signature (DocuSign, Enerflo e-sign, other)				
Project management / install tracking (Enerflo, Sunbase, spreadsheet)				
Permitting (SolarAPP+, AHJ portals, permit service)				
Monitoring platforms (Enphase, SolarEdge, Tesla)				
Calendar / booking				
Review management				
Google Ads / Local Services Ads / Meta ads accounts				
Lead vendors / marketplaces (EnergySage, other)				
Payroll / commission tracking (milestone pay)				
Spreadsheets / shared drives				
Other				

Roughly what does all of that cost per month, combined? And which tool frustrates the team most?

Do you already have a GoHighLevel account?

☐ No ☐ Yes – we own it ☐ Yes – through another agency ☐ Not sure

5. Where Leads Come From Today

Tick each source and give a rough monthly count. Guesses are fine; we'll replace them with real numbers in week one.

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Door-to-door / canvassing		☐ Self-gen (rep's own network)	
☐ Customer referrals		☐ Neighbor / yard-sign leads	
☐ Events, fairs and retail kiosks		☐ EnergySage and other marketplaces	
☐ Purchased lead vendors		☐ Google search / ads / Local Services Ads	
☐ Facebook / Instagram ads		☐ Website / online quote form	
☐ Roofer, electrician and HVAC referrals		☐ Realtor referrals	

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Installer or EPC-provided leads		☐ Organic social / video	
☐ Past proposals (unsold)		☐ Other:	

Lead to appointment set %	Set to sit %	Sit to signed %	Signed to PTO % (after cancellations)

Walk us through the first 5 minutes after a lead arrives right now. Who sees it, how, and how fast does a human respond?

What happens to a lead that doesn't answer the first call? How many attempts, over how many days, and who tracks it?

What happens to someone who isn't ready to buy yet? Do they ever hear from you again?

Which of these leak the most business today?

- ☐ Slow first response to web and ad leads
- ☐ Canvass leads with no written opt-in (can't text them)
- ☐ Unsold proposals never followed up
- ☐ Cancellations inside the cancel window
- ☐ Homeowners go silent waiting on permit / interconnection
- ☐ Finance turn-downs die silently
- ☐ Reps leave and take their follow-up with them
- ☐ Installed customers never asked for referrals or storage

Other:

6. Pipeline

We will build your pipeline exactly as you run it. Edit the stages below or write your own; tell us what should happen automatically at each one.

Suggested stages: New Lead → Appointment Set → Sat → Proposal Presented → Signed → Site Survey → Design → Permit → Install Scheduled → Installed → Inspection & Interconnection → PTO → Installed Base
Side lanes: Unsold / Rehash · Cancelled (with reason) · Finance Declined · On Hold (roof, MPU, HOA) · Not Qualified (shade, roof, renter)

Your actual stages, in order (or 'use suggested')

STAGE	WHAT SHOULD HAPPEN AUTOMATICALLY HERE? (TEXT, EMAIL, TASK, NOTIFY A PARTNER)	WHO IS RESPONSIBLE

Does every signed deal carry the state disclosure packet (e.g. California SEDD cover page and CPUC guide) before signature today?	☐ Yes	☐ No
Do homeowners get milestone updates (survey, permit, install, PTO) automatically today?	☐ Yes	☐ No
Do you want a finance turn-down lane that offers other ownership options and, on request, a credit repair partner introduction?	☐ Yes	☐ No

7. Referral Partners

The people who send you business. This is usually the biggest growth lever and the least tracked.

PARTNER TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Roofers
- ☐ Realtors (solar home sales, lease transfers)
- ☐ Credit repair partner (turn-down lane)
- ☐ Home-equity / mortgage lender for customer financing (recognition and co-marketing only, no referral fees)
- ☐ Electricians (panel upgrades)
- ☐ Installers / EPCs (for dealers)
- ☐ Past customers (refer-a-neighbor)
- ☐ HVAC / home-energy contractors
- ☐ Sales dealers (for installers)
- ☐ Property managers / HOAs

Other:

How do you track which partner sent which customer, and does the partner ever see that record?

What do you do for partners today (co-branded material, events, updates)? What would you like to do?

> **Note.** Referral fees to partners are allowed only where state law permits that partner type to receive one and the fee is disclosed to the homeowner on the proposal or contract; check the state contractor board and, for realtors, the real estate commission first. Partner statements go to the partner only – no fee language ever appears in a homeowner message. Reporting-only lanes (attribution and recognition, no money) are always available.

Partners you want to add in the next 90 days (#)

Who owns partner relationships?

8. After the 'Yes'

Documents or items you chase most often

- ☐ Signed contract with disclosure cover page (SEDD in California)
- ☐ Signed CPUC Solar Consumer Protection Guide (PG&E / SCE / SDG&E and other listed utilities)
- ☐ Signed cancellation notice
- ☐ Loan, lease or PPA documents (in the provider's portal)
- ☐ Recent utility bill(s) / usage data
- ☐ Site survey appointment and photos
- ☐ HOA approval
- ☐ Main panel photos / MPU sign-off
- ☐ Permit documents and plan set approval
- ☐ Interconnection application signatures
- ☐ Final inspection sign-off
- ☐ Monitoring app setup

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Cancel-window welcome sequence
- ☐ Milestone updates to homeowner and rep
- ☐ PTO celebration and "how to read your monitoring app"
- ☐ Review request at PTO
- ☐ Referral ask at PTO + 30 days
- ☐ Annual production check-in prompt
- ☐ Storage / add-on campaign to the installed base
- ☐ Nothing consistent

Past customers in your database (#)

Last time they all heard from you

% of business from repeat / referral

Describe your dream after-the-sale program in one paragraph. What would make a past customer call you first next time?

9. Monthly Time Audit

Where the hours actually go. Estimate hours per month per task and who does it. This tells us what to automate first and how to price the monthly.

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Answering / calling back new leads				☐
Confirming and rescheduling appointments				☐
Following up on unsold proposals				☐
Sending contracts and chasing signatures				☐
Disclosure packet assembly and checks				☐
Welcome calls during the cancel window				☐
Homeowner "where's my install?" calls				☐
Reps asking ops for deal status				☐
Chasing site surveys and HOA approvals				☐
Permit status checks and resubmittals				☐
Utility interconnection status checks				☐
PTO follow-up and monitoring setup				☐
Finance turn-down follow-up				☐
Milestone-pay / commission calculations				☐
Review and referral requests				☐
Recruiting and onboarding reps				☐
Building weekly numbers for the owner				☐
Data entry between CRM, sales platform and spreadsheets				☐
				☐
				☐

What do you dread every month? What always falls through the cracks?

What would you do with 20 extra hours a month?

If this were running perfectly 90 days from now, what would be different? (Be specific: numbers, feelings, what you'd stop doing.)

10. Your Operating Rhythm -- reports and recurring tasks

Tick the reports you actually run or receive, and tell us where each comes from and who pulls it. 'We can make it' is our proposal: FULL = runs by itself, you just receive it · SEMI = we build it, one person approves or does one step · ASSIST = a person still does it, we prep, remind, log and report. In the last column tell us what you want: F / S / K (keep manual).

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Daily Knocks / Sets / Sits / Closes by Rep	☐			FULL	
Lead Source Report / Response Time	☐			FULL	
Appointment Show Rate	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Proposal-to-Signed (Close Rate) by Closer	☐			FULL	
Cancel Report (by rep, reason, days after signing)	☐			FULL	
Signed-to-PTO Stall Board	☐			FULL	
Permit Aging	☐			FULL	
Interconnection / PTO Aging	☐			FULL	
Finance Approval / Turn-Down Report	☐			SEMI	
Unsold Proposal Book	☐			FULL	
Milestone-Pay (M1/M2/M3) Inputs	☐			SEMI	
Cost per Signed Deal by Source	☐			FULL	
Review / Reputation Report	☐			SEMI	
Referral and Installed-Base Report	☐			FULL	
Rep Scorecard	☐			FULL	
Marketing Compliance Log (templates, consents, opt-outs)	☐			FULL	
Commission statement per setter / closer	☐			FULL	
	☐			--	
	☐			--	

Other things done on a schedule that aren't on the list

Think: morning huddle numbers, Monday stall review, weekly cancel review, milestone-pay cutoff, permit resubmittal checks, utility portal sweeps, rep onboarding and registration renewals, monthly lender/TPO reconciliation.

TASK	DAILY / WEEKLY / MONTHLY	SYSTEM OR WEBSITE IT LIVES IN	WHO DOES IT	HOURS / MO	F / S / K

Which of these would you hand off tomorrow if you trusted the output? Which ones would you never hand off?

The logins and portals your team touches every day go on the **Logins & Portals** page near the end.

11. Starting Points -- the three packages

Three packages, one system. Everything in Launch is in Growth; everything in Growth is in Full Engine. Prices are starting points, confirmed in your written quote.

Launch

$3,500 build, starting point

then **$697 / mo**, platform included

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

Growth

$6,500 build, starting point

then **$1,197 / mo**, platform included

Launch + onboarding, retention, database re-activation, your industry engine, the AI assistant and the full Monday report. The package most businesses land on.

Full Engine

$9,500 build, starting point

then **$1,697 / mo**, platform included

Growth + the referral-partner program with statements, partner outreach, recruiting, every operating-rhythm automation and the monthly automation think-tank.

> For a solar company: Launch covers speed-to-lead with setter-to-closer routing, missed-call text-back, appointment confirmations, the 5-day drip, lead-source tagging, the PTO review request and the compliance shell (license numbers, quiet hours, no tax-credit, savings or payment language); Growth adds the Signed-to-PTO Engine – the disclosure-first contract gate, cancel-window welcome, milestone broadcast to homeowner and rep, the stall board, the unsold-proposal rehash lane, the finance turn-down lane and the installed-base referral program – plus onboarding, re-activation and the full Monday report; Full Engine adds roofer, electrician, realtor and installer partner lanes with statements where legal, the rep recruiting funnel, and every operating-rhythm automation.

INCLUDED IN GROWTH AND FULL ENGINE

The Signed-to-PTO Engine

- Disclosure-First Contract Gate: SEDD cover page, CPUC guide and the right cancel notice before a deal can move to Signed
- Cancel-Window Welcome Sequence: calm what-happens-next messages; cancellations alert the owner the same hour
- Lender and TPO Verification Prep: homeowner knows the call is coming; answers are never scripted
- Signed-to-PTO Milestone Broadcast: survey, design, permit, install, inspection, interconnection, PTO – to homeowner and rep
- The Stall Board: every signed deal sorted by days in stage, with permit and interconnection stall flags
- Rep Deal Board: each rep sees their deals' milestone status without calling ops
- Unsold-Proposal Rehash Lane: 7-day fast sequence, 60-90 day education track, then quarterly
- Finance Turn-Down Lane: other ownership options, credit repair introduction on request, no decision language
- PTO Referral and Base Program: review at PTO, referral at 30 days, storage and add-on campaigns
- The Compliance Wall: blocked tax-credit, savings, utility-affiliation and payment language on every template

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
FOUNDATION				
White-labeled platform workspace	Your CRM, pipelines, calendars, phone, email and automations in one place under your brand; licence included in the monthly	●	●	●
Branded email + business phone line	Your domain email and a tracked local number with call routing and recording (with disclosure)	●	●	●
Forms, booking pages and consent capture	Every form, landing page and calendar records written consent to call and text, with a privacy link	●	●	●
Business texting registration (A2P 10DLC)	We prepare the whole submission – EIN, address, privacy policy, sample messages matched to your consent language – and drive it through carrier review. You submit it under your own business identity, as the carriers require	●	●	●
Compliance shell	Timestamped consent records, opt-outs honored on every channel, quiet hours, required disclosure lines and a blocked-phrase list on every template	●	●	●
SALES ENGINE				
Pipeline built to your stages	Your process mapped into stages with side lanes, named the way your team talks	●	●	●
Instant response + round robin	Text + email to every new lead in under 60 seconds; claim-window assignment with automatic reassignment	●	●	●
Missed-call text-back	Every missed call gets a text with a booking link	●	●	●
5-day follow-up drip	Stops the moment they reply or opt out	●	●	●
Long-term nurture	Sized to your buying cycle, with a re-engagement alert when someone comes back	–	●	●
Appointments	Booking calendars per person, confirmations and reminders	●	●	●
Lead-source tagging	Every lead tagged by source at entry, so cost per sale by source is arithmetic	●	●	●
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
After-hours AI assistant	Answers, qualifies and books when nobody is there, fenced by your industry's never-list	–	●	●
OPERATIONS & RETENTION				
Branded email templates	Your identifiers locked into every template	–	●	●
Client onboarding + invoicing	Welcome, what-happens-next, secure document upload, e-sign, payment links with reminders	–	●	●
Document / signature chase	Reminders with secure upload links until the checklist is complete; live checklist for staff	–	●	●
Database re-activation campaign	Old leads and past customers worked in a ramped, bounce-guarded, auto-unsubscribe campaign	add-on	●	●
Retention program	Anniversaries, check-ins, renewals, and the save flow when someone tries to leave	–	●	●
Industry engine: The Signed-to-PTO Engine	Disclosure-First Contract Gate; Cancel-Window Welcome Sequence; Lender and TPO Verification Prep; Signed-to-PTO Milestone Broadcast; The Stall Board; Rep Deal Board; Unsold-Proposal Rehash Lane; Finance Turn-Down Lane; PTO Referral and Base Program; The Compliance Wall	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
Owner-routed onboarding	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 setter / closer.	–	●	●
Commission ledger	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: setter / closer commissions tied to milestone funding.	–	–	●
PARTNERS & GROWTH				
Referral partner program	Tracked link and printed QR card per partner; attribution written automatically at lead creation	add-on	add-on	●
Printable partner materials	Welcome packet, counter cards, one-pagers, version-numbered	–	–	●
Monthly partner statements	Sent automatically; what a statement may contain is set by the law in your industry	add-on	add-on	●
Partner outreach campaign	A campaign to add partners in your territory, tracked in a partner pipeline, with a no-fee version wherever a fee is illegal	add-on	add-on	●
Partner lanes	A separate pipeline and cadence per partner type	–	add-on	●
Recruiting funnel	Landing page, application, drip, interview booking; who it recruits is set for your industry	–	–	●
COMMAND & CONTROL				
Daily recap	End-of-day summary: leads, response times, appointments	●	●	●
Monday owner's report	Launch: the weekly funnel report. Growth and up: the full owner's report, written as what the business accomplished	o lite	●	●
Live dashboard	One screen for the owner and managers instead of four logins	add-on	●	●
Operating-rhythm automations	The daily / weekly / monthly reports and tasks you mark in section 10	–	–	●
Internal task and alert flows	Unclaimed lead, stalled file, deadline at risk, negative review, manager escalation	–	–	●
Written procedures	Your team's own operations written down	–	–	●
Monthly business report	In addition to the weekly report	add-on	add-on	●
Handoff booklet + training	Every automation documented with screenshots; team trained; Full Engine keeps it current	●	●	●
Priority support	Named contact, weekly 20-minute call, same-day changes	–	–	●
Monthly automation think-tank	A working session every month: we find what your team still does by hand and design and build a custom automation for it	–	–	●

● = included · o lite = lighter version (see description) · add-on = available on that package at the add-on price · – = not included.

Every monthly includes the platform licence for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already own your own HighLevel account. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. Add-ons bought with the build are 15% less than added later. Regulated industries get a compliance review in week one at no charge. You own everything: accounts, data, scripts, documents.

Add-ons – attach to any package (fixed fees; starting points, confirmed in your written quote). Tick any you want quoted.

QUOTE IT?	ADD-ON	FEE	NOTE
WEBSITES & SEARCH			
☐	Online Presence: Starter (bundle)	$1,800	Core site + Local SEO foundation + social profile set-up; $2,200 separately
☐	Online Presence: Complete (bundle)	$3,200	Full site + Local SEO foundation + brand kit + social profile set-up; $4,000 separately; first month of Local SEO growth free
☐	Website build: core site	$1,200	Up to 6 pages (home, about, services/products, apply/contact, reviews, compliance/disclosures); lead capture and booking wired to the CRM; mobile, speed and basic on-page SEO
☐	Website build: full site	$2,400	Up to 15 pages, including per-product/service pages, location pages, team or rep pages, a recruiting page and blog set-up
☐	Website redesign / migration	$900	Existing site rebuilt or moved, with redirects kept so rankings are protected
☐	Additional pages (per 5)	$350	Product, location, landing or partner pages
☐	Local SEO foundation	$750	Google Business Profile optimization, top citations with consistent name/address/phone, on-page SEO and schema, Search Console and analytics set-up, a service-area page plan
☐	Google Business Profile set-up & optimization	$250	Standalone, if Local SEO foundation isn't bought
☐	Brand kit	$600	Logo refresh, colors, fonts, email signature, social and document templates
☐	Social profile set-up	$250	Branded Facebook, Instagram, LinkedIn and YouTube profiles linked to the CRM
☐	Accessibility review & fixes	$450	WCAG review of the site, with the fixes made
☐	Google Ads account build	$600	One-time campaign build; ongoing management is the paid ad management line
☐	Local SEO growth (monthly)	$350 / mo	2 articles a month, weekly Google Business Profile posts, citation and review monitoring, a rank and traffic report
☐	Website care plan (monthly)	$49 / mo	Hosting, updates, backups, uptime monitoring, compliance-page upkeep and small edits
REVENUE CHANNELS			
☐	Referral / affiliate program	$3,500	Included in Full Engine
☐	Partner prospect research (per 100 contacts)	$750	
☐	LinkedIn prospecting pipeline	$1,200	
☐	Cold outreach engine (per engine)	$3,500	
☐	Owned-list reactivation	$1,500	Included in Growth and up
SYSTEMS & DATA			
☐	Third-party integration	$2,500	Connects the platform you already run on
☐	Payment processor migration	$900	Paying clients moved to new payment links or card-on-file; old invoices cancelled only after payment clears
☐	Client data migration	$1,500	
☐	Custom reporting automation	$2,500	
☐	Executive reporting	$1,200	Monthly business report included in Full Engine
☐	Performance dashboard	$1,800	Live dashboard included in Growth and up
CREATIVE & COLLATERAL			
☐	Video ad production	$1,500	
☐	Document set	$2,000	
☐	QR capture system	$900	
☐	Lead magnet	$1,200	Includes the capture page and follow-up
STRATEGY & RISK			
☐	Growth audit & 12-month plan	$2,500	
☐	Industry compliance review	$1,500	Week-one review free in regulated industries; this is the full written review
☐	Messaging & carrier registration	$900	Registration prep is included in every package
☐	Operations audit	$1,500	
ONGOING -- BILLED MONTHLY			
☐	Paid ad management	$800 / mo	Ad spend billed direct to the platform
☐	Additional campaign management	$400 / mo	
☐	Partner channel management	$600 / mo	
☐	Deliverability & compliance monitoring	$300 / mo	

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**Content production**	**$700 / mo**	

We never guarantee search rankings or traffic. Bundle prices replace the 15% with-the-build add-on discount; they don't stack.

Which package are you leaning toward?

☐ Launch ☐ Growth ☐ Full Engine ☐ Not sure – recommend one

Anything about the packages or add-ons you want us to explain on the call?

12. What We Can Take Off Your Plate

Tick everything that sounds useful. Write your top three below. This becomes the build order.

[L] included in Launch and up · [G] Growth and up · [F] Full Engine · [+] add-on, any package

SPEED TO LEAD

- ☐ Instant text + email to every new lead, under 60 seconds, under your brand [L]
- ☐ Setter-to-closer handoff with "claim it or it moves on" rules; setter keeps credit [L]
- ☐ Missed-call text-back on the office line and each rep's line [L]
- ☐ Online booking calendars per closer with confirmations and reminders [L]
- ☐ Written opt-in step for door-knock and event leads before any automated text [L]
- ☐ After-hours AI assistant that qualifies roof, shade, ownership and utility and books the appointment – never quotes price or savings [G]

FOLLOW-UP THAT NEVER FORGETS

- ☐ 5-day "we tried to reach you" drip that stops the moment they reply [L]
- ☐ Lead-source tagging so cost per signed deal by source is arithmetic [L]
- ☐ Unsold-proposal rehash: 7-day fast sequence, 60-90 day education, then quarterly [G]
- ☐ Finance turn-down lane with other ownership options and a credit repair partner introduction on request [G]
- ☐ Re-activation campaign across old leads and unsold proposals (ramped, bounce-guarded, auto-unsubscribe) [G]
- ☐ Per-rep landing pages and QR cards that stay with the company when a rep leaves [G]

SIGNED TO PTO

- ☐ Disclosure-first contract gate: SEDD, CPUC guide and cancel notice before a deal moves to Signed [G]
- ☐ Cancel-window welcome sequence; cancellations alert the owner the same hour [G]
- ☐ Milestone updates to the homeowner and the rep from survey to PTO [G]
- ☐ Stall board flagging permits, interconnections and installs that stop moving [G]
- ☐ Document chase with secure upload links (utility bill, HOA approval, panel photos) [G]
- ☐ Deposit and progress-payment links with reminders (California down-payment cap enforced) [G]

INSTALLED BASE & REFERRALS

- ☐ Review request at PTO with a second ask if no click [L]
- ☐ Referral ask at PTO + 30 days with per-rep QR cards [G]
- ☐ Storage and add-on campaign to every installed customer [G]
- ☐ Annual production check-in prompt pointing to the homeowner's monitoring app [G]
- ☐ Roofer, electrician, realtor and installer partner lanes with tracked links [F]
- ☐ Monthly partner statements (money only where legal and disclosed) and partner outreach campaign [F]

YOUR SALES FLOOR

- ☐ Rep deal board so reps stop calling ops for status [G]
- ☐ Rep recruiting funnel: landing page, application, interview booking, onboarding checklist with salesperson registration [F]
- ☐ Daily knocks, sets, sits and closes per rep [F]
- ☐ Milestone-pay inputs exported for payroll approval [F]
- ☐ LinkedIn prospecting pipeline for installer or dealer partnerships [+]
- ☐ Paid ad management for Google, LSA and Meta [+]

COMMAND & CONTROL

- ☐ Compliance shell: license numbers on every template, quiet hours, opt-out handling across channels, blocked-phrase list [L]
- ☐ Daily recap and weekly funnel report [L]
- ☐ Branded email + phone line so homeowners see one company [L]
- ☐ Full weekly owner's report and live dashboard [G]

- ☐ Internal alerts: cancellation, stalled permit, missing disclosure, expiring registration [F]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever your team still does by hand [F]

MONEY DESK

- ☐ Owner-routed onboarding: every new homeowner gets the welcome from their own setter or closer – the setter or closer's name, email and own sign-up link – so the file lands in that setter or closer's queue; one message per homeowner, never duplicates [G]
- ☐ Secure two-step sign-up: Utility bills and credit data never by email; the welcome sends them to a secure form that files it straight into your system of record [G]
- ☐ Commission ledger for setter and closer commissions tied to milestone funding: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per setter or closer and a 'needs attention' list [F]
- ☐ Payment processor migration: every paying homeowner moved to new payment links or card-on-file; old invoices cancelled only after payment clears [+]

Top pick #1 ____________ **Top pick #2** ____________ **Top pick #3** ____________

Anything you want that isn't on the list

____

13. Compliance & Consent

Your industry's marketing is regulated. We build the guardrails in; you tell us your rules.

Which apply to you?

- ☐ TCPA written consent for automated texts; opt-outs honored across every channel
- ☐ Do-Not-Call scrub for outbound calling; state mini-TCPA rules (e.g. Texas, Florida, Oregon)
- ☐ Quiet hours 8am-9pm local (8pm in Oregon)
- ☐ Contractor license number in all advertising (e.g. California CSLB)
- ☐ Salesperson registration (California HIS; Texas TDLR salesperson registration by September 1, 2026)
- ☐ California Solar Energy System Disclosure Document as contract cover page (B&P 7169), same language as the pitch
- ☐ CPUC Solar Consumer Protection Guide signed before the contract (PG&E, SCE, SDG&E, Bear Valley, PacifiCorp, Liberty)
- ☐ Cancellation notice: FTC Cooling-Off Rule 3 business days; California 5 for age 65+; Texas solar 5 business days
- ☐ No tax-credit claims for purchased systems (25D ended after December 31, 2025); no implied credit to lease/PPA customers
- ☐ No savings guarantees, utility or government affiliation claims (FTC Act, Impersonation Rule)
- ☐ Reg Z: no payment figures without full disclosures; cash price and financed price disclosed consistently
- ☐ City door-to-door solicitor permits where required

Other: ____________

Is the team currently allowed to text homeowners?	☐ Yes	☐ No
Do your door-knock and event forms capture written consent to text and call?	☐ Yes	☐ No
Does anyone review proposals and marketing before they go out?	☐ Yes	☐ No
Have you had any complaints, AG inquiries, lender audits or chargebacks we should design around?	☐ Yes	☐ No

Compliance officer / attorney (name, email) ____________ **Turnaround needed for approvals** ____________

Any past complaints, audits, or rules from a regulator we should design around?

____

14. Reporting & Communication

Who receives the Monday report? (names, emails) ____________ **Best day / time** ____________

Numbers you care about most

- ☐ Leads by source
- ☐ Speed to first response
- ☐ Set rate and sit rate
- ☐ Close rate by closer
- ☐ Signed deals and kW sold
- ☐ Cancellation rate and reasons
- ☐ Days signed to PTO
- ☐ Stalled deals by stage
- ☐ Finance approvals and turn-downs
- ☐ Cost per signed deal by source
- ☐ Referrals and storage add-ons from the installed base
- ☐ Reviews received

Other:

How do you want us to communicate during the build?

- ☐ Text
- ☐ Email
- ☐ Weekly call
- ☐ Shared doc
- ☐ Slack / Teams

15. Access Checklist

We will request these on the intake call. Tick what you can provide now. Nothing is changed without your sign-off.

- ☐ Domain registrar / DNS login (or add us as a user)
- ☐ Google Workspace / Microsoft 365 admin (branded email + calendars)
- ☐ Website host / builder login
- ☐ Existing CRM export (contacts, notes, tags, proposals)
- ☐ Sales platform (Enerflo or similar) export or API access – read-only unless agreed
- ☐ Unsold proposal list with dates and system details (CSV)
- ☐ Installed-customer list with PTO dates (CSV) and consent status
- ☐ Facebook Business Manager + page admin
- ☐ Google Business Profile manager access and ad accounts
- ☐ Contractor license and registration numbers for every state
- ☐ Current contract, disclosure packet and cancel notice templates
- ☐ Company EIN, legal address and website with privacy policy (required for business texting registration)
- ☐ Existing phone number(s) to port or forward
- ☐ Logo files, rep headshots and install photos

Anything else we should know before we start?

Logins & Portals

The systems we will need to reach during the build. Fill in what you can; leave a row blank if you'd rather share it live on the intake call. Where a system lets you add us as a user, do that instead of sharing your own password.

PORTAL	WEB ADDRESS	USERNAME	PASSWORD	2FA / WHO GETS THE CODE
Enerflo (sales platform)	enerflo.com			
Aurora Solar (design and proposals)	aurorasolar.com			
OpenSolar (design and proposals)	opensolar.com			
GoodLeap (loans)	goodleap.com			
Sunlight Financial (loans)	sunlightfinancial.com			
Palmetto LightReach (lease / PPA)	palmetto.com			
Other lender or TPO portal (legacy Mosaic loans now service				
Utility interconnection portal (PG&E, SCE, SDG&E, other; ma				
Permitting portal(s) (SolarAPP+ where adopted, city/county A				
CSLB online services (California license)	cslb.ca.gov			
Texas TDLR (retailer / salesperson registration)	tdlr.texas.gov			
Canvassing app (SalesRabbit, Spotio)	salesrabbit.com / spotio.com			
Enphase installer / monitoring	enlighten.enphaseenergy.com			
SolarEdge monitoring	monitoring.solaredge.com			
Distributor portal (CED Greentech, Soligent, other)				
DocuSign / e-sign	docusign.com			
Google Business Profile / Google Ads / Local Services Ads	business.google.com / ads.google.co			
Meta Business Suite	business.facebook.com			

Return this packet through a secure upload link, not by email.

Sign-off

Nothing here commits you to anything. Within two business days you get a one-page Client Brief and a fixed quote.

Client – name	Client title	Client signature	Client date
Everborn – name	**Everborn title**	**Everborn signature**	**Everborn date**
Chris Magee			