Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Dealership Intake Packet

For the General Manager. The GM Desk is your own job: the DOC card at 7am, the save-a-deal list by 8, CIT aging that escalates itself, overdue-task counts to the desk (we aim for noon and 5pm), the close-of-day recap, the Monday report, and a month-end pack, forecast draft and comp inputs you approve instead of build. The rest of the store plugs in later, one department at a time, when you're ready.

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 two GM Desk 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.

The sales floor and BDC have their own packet (Dealership Sales), and so do the finance office and the desk (F&I + Desk). This one starts with the GM's own day.

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.**

DEALERSHIP

YOUR NAME / TITLE

DATE

EVERBORN CONTACT

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1. Store Basics

Dealership legal name (exactly as on your W-9)

DBA / store name

Main phone

Main email

Website

Office address (city, state, zip)

Franchise(s) / brands

Dealer license #

Year opened

Dealer group (if any)

Number of rooftops

Total employees

Store type

- ☐ Franchised new + used
- ☐ Independent used
- ☐ Buy-here-pay-here
- ☐ Powersports / RV / marine
- ☐ Commercial / fleet
- ☐ Part of a multi-store group

Other:

Departments in the building

- ☐ New sales
- ☐ Used sales
- ☐ F&I
- ☐ BDC / internet
- ☐ Service
- ☐ Parts
- ☐ Body shop
- ☐ Detail / recon
- ☐ Wholesale
- ☐ Rental / loaner

Other:

New units / month

Used units / month

Avg front gross

Avg back gross (PVR)

Service ROs / month

Sales staff (#)

BDC agents (#)

12-month unit goal

In one or two sentences, why does a customer buy from this store instead of the one down the freeway? And what is the biggest constraint to hitting your unit goal?

2. Leadership & Team

Everyone who owns a number. We use this for users, round-robin, escalations, and who gets which report.

NAME	ROLE (GM / GSM / Desk / F&I / BDC / Internet mgr / Sales)	EMAIL	CELL	IN ROUND ROBIN?
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

Dealer principal / owner (name, email)

BDC hours of coverage (in-house or outsourced?)

Up rotation / round-robin order

Claim window you would accept (minutes)

How are internet leads assigned today?

- ☐ BDC works them all
- ☐ Round robin to salespeople
- ☐ Whoever grabs it
- ☐ Internet manager assigns
- ☐ By brand (new / used)
- ☐ Salesperson's own leads only

Other:

Do you have a BDC? ☐ Yes ☐ No

Are you actively hiring salespeople, BDC agents, or techs? ☐ Yes ☐ No

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

3. Brand, Voice & OEM Rules

So every text, email, page, and printout sounds like your store and stays inside the manufacturer's brand standards.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

- ☐ Logo (PNG/SVG, light + dark)
- ☐ Manager headshots
- ☐ Store photos / video
- ☐ Current email signature
- ☐ OEM brand guide / co-op rules
- ☐ Existing landing pages
- ☐ Current flyers / mailers
- ☐ Review links

Other:

Google Business Profile link

Review links (Google / DealerRater / Cars.com / Yelp)

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

- ☐ Friendly & local
- ☐ Professional / brand-standard
- ☐ High-energy sales
- ☐ Helpful / no-pressure
- ☐ Bilingual (specify)

Other:

Does the OEM require pre-approval of marketing or restrict texting / email templates? ☐ Yes ☐ No

Required disclosure line(s) for all marketing (e.g. 'dealer license #, total price and 'plus government fees and taxes' language, doc fee language, OEM legal') – paste it exactly

Anything we must NEVER say or promise (payment claims, 'guaranteed approval', 'pre-approved', 'everyone approved', price claims, etc.)? California stores also: a price below the vehicle's total price, an add-on called required, government or military endorsement, or anything suggesting a used-car buyer can't cancel.

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 / ?
DMS (CDK, Reynolds, Dealertrack, Tekion, other)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
CRM (VinSolutions, DealerSocket, eLead, DriveCentric, other)				
Website provider (Dealer.com, DealerOn, other)				
Inventory / pricing (vAuto, HomeNet, LotLinx, other)				
Digital retailing (Roadster, Gubagoo, Darwin, other)				
Chat / texting tool (Podium, Gubagoo, Kenect, other)				
Phone system / call tracking (CallRevu, other)				
Lead providers (Autotrader, Cars.com, CarGurus, other)				
OEM lead / dealer portal				
Credit app / soft-pull tool (700Credit, other)				
Equity mining / trade-cycle (AutoAlert, Mastermind, other)				
Service scheduler (Xtime, myKaarma, other)				
Reputation / reviews (Podium, Birdeye, Widewail, other)				
Email / mail marketing vendor				
Facebook / Instagram ads account				
Google Ads account (and agency, if any)				
Facebook Marketplace / social posting tool				
Business email hosting (Google / Microsoft)				
Domain registrar & DNS				
Spreadsheets / shared drives				
Other				

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

Do you already pay for an automation / CRM platform account of your own?

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

5. Where Customers Come From Today

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

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Internet leads (website)		☐ Third-party leads (Autotrader, Cars.com, CarGurus)	
☐ OEM leads		☐ Phone-ups	
☐ Walk-ins / lot traffic		☐ Service drive	
☐ Repeat / referral customers		☐ Credit applications online	
☐ Facebook Marketplace / social		☐ Facebook / Instagram ads	
☐ Google Ads / SEO		☐ Equity mining / lease-end	
☐ Credit repair / partner referrals		☐ Events / community	
☐ Other:			

Total leads + ups / month | **Appointment set %** | **Show %** | **Sold %**

Cost per lead (third-party) | **Cost per sold unit (marketing)** | **Monthly ad + lead spend** | **Best-performing source**

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

What happens to a lead that doesn't answer? How many attempts, over how many days, by whom, and when does it get marked dead?

What happens to an unsold showroom customer (came in, didn't buy)? Who follows up, and for how long?

What happens to a customer the desk can't get bought today? Do they ever hear from the store again?

Which of these leak the most business today?

- ☐ Slow response to internet leads
- ☐ No follow-up after 2-3 tries
- ☐ Unsold showroom traffic never worked
- ☐ Not-approved-today customers disappear
- ☐ Service customers never sold a car
- ☐ Lease-end / equity customers missed
- ☐ Sold customers never hear from us
- ☐ Leads live in a salesperson's phone
- ☐ Bad reviews unanswered
- ☐ Phone-ups mishandled

Other:

6. Sales Pipeline & Customer Journey

We build the pipeline the way your store actually works. Edit the stages or write your own; tell us what should happen automatically at each one.

Suggested stages: New Lead → Contacted → Appt Set → Confirmed → Shown → Written → Sold → Unsold / Nurture
Side lanes: Unsold Showroom · Be-Back · Not Approved Today · Waiting on Trade / Co-signer · Lost / Bought Elsewhere · Orphaned Owner (salesperson gone)

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

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

Unsold cadence you run today (days) | **Lease maturity list source** | **Month you first touch the sold base for a trade**

Do customers get appointment confirmations and reminders automatically today? ☐ Yes ☐ No

Do managers get alerted when a lead sits unanswered or an appointment no-shows? ☐ Yes ☐ No

Do you want a Not-Approved-Today lane: the salesperson hands a partner counter card in person, and the customer stays in a long nurture so they come back to this store when ready? ☐ Yes ☐ No

Do you want service customers with equity or an upcoming lease end flagged to the sales desk automatically? ☐ Yes ☐ No

7. Partners & Community

Credit repair, insurance, employers, credit unions, community groups. Usually the least tracked and the cheapest traffic.

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

Partner types

☐ Credit repair companies
☐ Employers / HR (employee pricing)
☐ Schools / sports teams
☐ Other dealers (wholesale / referrals)
☐ Insurance agents
☐ Rideshare / gig programs
☐ Rental / fleet accounts
☐ Credit unions / local lenders
☐ Military / first-responder groups
☐ Body shops / independents

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. Bird-dog payments are regulated state by state, and in some states a contingent payment can make the underlying sale unenforceable. What IS allowed by default, and what we build: non-cash, non-contingent recognition (co-marketing, partner-branded materials, priority service scheduling, a donation in the partner's name) and monthly partner statements showing referrals, appointments and deliveries. Where your state permits cash fees, they are paid under your own written program, reviewed by your counsel, capped, on a 1099, and never to the buyer of the referred deal.

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

Who owns partner relationships?

Are you enrolled in a credit repair partner program today? ☐ Yes ☐ No

Has your counsel reviewed bird-dog compensation for your state? ☐ Yes ☐ No

8. After the Sale -- Retention & Service-to-Sales

Items you chase most often after the deal is written

☐ Pay stubs
☐ Driver's license
☐ Proof of residence
☐ Signed odometer statement
☐ References
☐ Trade title / payoff letter
☐ Proof of insurance / binder
☐ Missing title / registration signatures

Other:

How are stips collected today?

Who chases missing stips?

Who owns the post-delivery follow-up?

What happens after delivery today?

☐ CSI survey push
☐ First-service appointment set
☐ Birthday / anniversary
☐ Nothing consistent
☐ Review request
☐ Trade-cycle / equity outreach
☐ Referral ask
☐ Thank-you from GM
☐ Lease-end outreach
☐ Newsletter / specials

Sold customers in the DMS (#)

Last time they all heard from you

% of sales from repeat / referral

Service customers who did NOT buy here (#)

Who works the service drive for sales?

Leases maturing in next 12 mo (#)

Describe your dream owner program in one paragraph. What would make a customer buy their next three cars here and send their family?

9. Monthly Time Audit

Where the hours actually go. Part 1 is your own time as GM; Part 2 is your managers' time. Estimate hours per month per task and who does it. This tells us what to take off your desk first and how to price the monthly.

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
PART 1 -- YOUR JOB				
Reading the DOC and working out MTD pace vs forecast				☐
Building the save-a-deal list and prepping the save-a-deal meeting				☐
Chasing contracts in transit and funding stips				☐
Chasing managers on overdue CRM tasks				☐
Replying to negative reviews and calling low CSI scores				☐
Month-end close prep with the controller				☐
Building next month's forecast by source and salesperson				☐
Pay-plan, spiff and bonus inputs for payroll				☐
20-group composite and the monthly financial statement				☐
OEM incentive / co-op claims and RDR checks				☐
Floor-plan audit prep and curtailments				☐
Matching vendor invoices to results; contract renewals				☐
Reports for the dealer principal and the team-meeting deck				☐
Recruiting, staffing and floor-schedule gaps				☐
California CARS Act: sign and contract-form checks, cancellation and record reviews				☐
PART 2 -- THE REST OF THE STORE (DEPARTMENT ADD-ONS, YOUR MANAGERS' TIME)				
Working and re-working internet leads				☐
Following up unsold showroom traffic and be-backs				☐
Confirming appointments and chasing no-shows				☐
Equity, lease-end and service-drive call lists				☐
Aged-inventory pricing, recon follow-up and Marketplace posting				☐
Data entry between CRM, DMS and spreadsheets				☐
				☐
				☐

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

If the DOC, the CIT list, the month-end pack and the forecast were waiting for you instead of built by you, where would those hours go?

If this were running perfectly 90 days from now, what would be different in your own week? (Units, gross, CSI, what you'd stop doing, what you'd finally have time for.)

10. Your Operating Rhythm -- the reports you live on

Part 1 is the reports you run or receive as GM; Part 2 is the rest of the store. Tick what you actually use, 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 (OEM, lender and floor-plan portals are always a person's click); 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
PART 1 -- YOUR JOB					
DOC (Daily Operating Control)	☐			FULL	
Sales Log / Deal Log	☐			FULL	
CIT (Contracts in Transit) Report	☐			SEMI	
Funding Delay / Stips Outstanding	☐			ASSIST	
CRM Task Compliance / Activity Report	☐			FULL	
Lead Source ROI / Cost per Sale by Source	☐			FULL	
Reputation Report	☐			FULL	
CSI / SSI Report	☐			SEMI	
Forecast / Month Plan draft	☐			SEMI	
Commission / Pay Plan inputs	☐			SEMI	
20-Group Composite	☐			SEMI	
Chargeback Report	☐			SEMI	
Monthly Financial Statement (to OEM)	☐			ASSIST	
OEM Incentive / Co-op Claims	☐			ASSIST	
RDR / Retail Delivery Reporting Status	☐			ASSIST	
Floor Plan Aging / Curtailment	☐			ASSIST	
Recruiting Report	☐			FULL	
Compliance Log (consent %, DNC, opt-outs, training due)	☐			FULL	
CARS Act Compliance Dashboard (California: total price, add-on disclosures, 3-day cancellations, records)	☐			SEMI	
PART 2 -- THE REST OF THE STORE (DEPARTMENT ADD-ONS)					
Showroom Traffic / Ups Log	☐			FULL	
Appointment Report (set / confirmed / shown, by rep and source)	☐			FULL	
Internet Lead Report / Lead Response Time	☐			FULL	
Unsold Follow-up / Desk Log Report	☐			FULL	
Missed Opportunity / Phone Report	☐			SEMI	
Website / SRP-VDP Analytics	☐			FULL	
Ad Performance (Google / Meta)	☐			FULL	
F&I Log / Product Penetration / PVR Report	☐			FULL	
Service Department Report (ROs, hours / RO, ELR, CP vs warranty)	☐			FULL	
Equity / Trade-Cycle Report	☐			FULL	
Lease Maturity Report	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Inventory Aging / Days Supply	☐			SEMI	
Price-to-Market / Market Days Supply	☐			SEMI	
Recon / Time-to-Line Report	☐			SEMI	
	☐			--	
	☐			--	

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

Think: morning meeting prep, OEM portal check-ins, floor-plan audits, incentive claims, 20-group composite, payroll inputs, vendor invoices and renewals, inventory pricing, recruiting, community events.

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 systems we need to reach, and how you add us as a user (no shared logins), are on the **Systems** page near the end.

11. Starting Points -- the GM Desk packages

Two packages, both built around your own job. Everything in the GM Desk is in GM Desk + Money & People. Prices are starting points, confirmed in your written quote.

GM Desk Growth

$6,500 build, starting point

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

Your own job on one system: your DMS data feed, the 7am DOC card, the save-a-deal list, the CIT board, manager task counts, the close-of-day recap, the Monday report and the month-end pack.

GM Desk + Money & People Full Engine

$9,500 build, starting point

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

Everything in the GM Desk, plus the commission worksheet on your own pay plans, OEM incentive, RDR and floor-plan prep, pay-plan review and people reports, a multi-rooftop roll-up, the monthly think-tank and a weekly call.

Launch is not offered for a GM desk: the GM Desk starts with your DMS data feed, which is Growth-level work.

For a General Manager we offer two packages, both built around your own job. The GM Desk (Growth) is your operating rhythm on one system: your DMS data feed, the live dashboard, the 7am DOC card, the save-a-deal list by 8, the CIT board with 5 / 10 / 15-day escalations, overdue-task counts to the desk, drafted review replies and low-CSI call tasks, the close-of-day recap, the Monday GM report, lead-source spend vs sold, the aged-inventory list, the month-end pack, the forecast draft, comp inputs, 20-group prep, vendor invoices and renewals, the annual marketing plan draft and the monthly compliance log, with a CARS Act dashboard and wall-sign check for California stores. GM Desk + Money & People (Full Engine) adds the commission worksheet on your own pay plans, OEM incentive, RDR and floor-plan prep (a person does every portal click), pay-plan review and people reports, Safeguards and OEM certification due dates, a multi-rooftop roll-up, the monthly think-tank and a weekly call. Launch is not offered for a GM desk. Every other department is an add-on to the same system, when you're ready.

INSIDE BOTH GM DESK PACKAGES — The GM Operating System

- The Morning Desk: the DOC card at 7am by email, and by text once the store's business-texting registration clears (units, gross, MTD pace vs forecast) and the save-a-deal list by 8am, with the reason and the salesperson
- The CIT Board: from your office's CIT schedule, every unfunded contract (cash waiting at the lender) aged, with stips outstanding and lender; escalations at 5 / 10 / 15 days to F&I, the manager and you
- Manager Accountability: overdue-task counts per salesperson and BDC agent from your CRM's task report, sent to the desk at the times your CRM can schedule it (we aim for noon and 5pm); 1-3 star reviews and low CSI scores come to you as a call task with a drafted reply
- The Month-End Pack: DMS and accounting reports parsed with variance vs forecast; the forecast draft from trailing-90 conversion by source and planned spend; comp inputs and 20-group fields pre-built; you adjust, the controller and payroll approve
- Spend, Vendors and the Monday Report: cost per sold unit by source, vendor invoices matched to results, a 60-day renewal reminder with that vendor's cost-per-sold history, and the Monday GM report at 8am

WHAT IS INCLUDED	GM DESK (GROWTH)	GM DESK + MONEY & PEOPLE (FULL ENGINE)
FOUNDATION		
Your workspace, branded email and business phone	●	●
DMS data intake through a dealer-authorized connection such as DealerVault (Authenticom), or reports your office schedules where the DMS needs it; CIT and month-end come from your office's scheduled accounting reports	●	●
Live dashboard for you and the dealer principal	●	●
DAILY		
7am DOC card: units, front and back gross, MTD pace vs forecast	●	●
Save-a-deal list by 8am, with the reason and the salesperson	●	●
CIT board from your office's CIT schedule, escalations at 5, 10 and 15 days to F&I, the manager and you	●	●
Overdue-task counts per salesperson and BDC agent from your CRM's task report, sent to the desk at the times your CRM can schedule it (we aim for noon and 5pm)	●	●
Review replies drafted; 1-3 star reviews come to you to approve; low-CSI call tasks	●	●
Close-of-day recap (10pm by default, set by the store), by email, and by text once the store's business-texting registration clears	●	●
WEEKLY		
Monday GM report at 8am for you and the dealer principal	●	●
Lead-source spend vs sold: cost per sold unit by source	●	●
Save-a-deal meeting prep; aged-inventory list (used 30 / 45 / 60+ days, new 90 / 120+ days)	●	●
MONTHLY AND YEARLY		
Month-end pack vs forecast; forecast draft; comp inputs; 20-group prep	●	●
Vendor invoices vs results; 60-day renewal reminders; annual marketing plan draft	●	●

WHAT IS INCLUDED	GM DESK (GROWTH)	GM DESK + MONEY & PEOPLE (FULL ENGINE)
Monthly compliance log; handoff booklet documenting every automation	●	●
California: CARS Act dashboard and the 36-point wall-sign and contract-form check	●	●
MONEY & PEOPLE		
Commission worksheet that applies your written pay plans and your own pay trigger (delivered, posted or funded); payroll computes wages. Before the first live month we recompute one past month with your office and match every line	–	●
OEM incentive and co-op deadlines, RDR check and floor-plan audit prep (a person does every portal click)	–	●
Pay-plan review, floor-coverage gaps, Safeguards Rule and OEM certification due dates	–	●
Multi-rooftop roll-up for a dealer group	–	●
Monthly automation think-tank and priority support with a weekly call	–	●

● = included · – = not included.

Every monthly includes the platform license for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already pay for the platform we build on. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. One-time add-ons bought with the build are 15% less than added later; monthly add-ons are not discounted. Regulated industries get a compliance review in week one at no charge. Your accounts, data and content are yours and export any time, and you keep the right to use the system we built even if you cancel. Our templates and methods stay ours, so no one can resell them. Agreements and invoices come from Everborn Marketing LLC dba Everborn Productions.

Add the rest of the store when you're ready. Five department add-ons, quoted when you want them:

- **Sales floor & BDC**
- **F&I & the desk**
- **Service-to-sales & retention**
- **Inventory & local presence**
- **Partners & recruiting**

Each one plugs into the same system: its activity shows up in your 7am DOC card, close-of-day recap and Monday report, and each department manager gets their own daily list. Section 12 lists what each one does.

Other add-ons – attach to either 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
SYSTEMS & DATA			
☐	**Third-party integration**	**$2,500**	Connects the platform you already run on
☐	**Client data migration**	**$1,500**	
☐	**Custom reporting automation**	**$2,500**	
☐	**Performance dashboard**	**$1,800**	Live dashboard included in Growth and up

QUOTE IT?	ADD-ON	FEE	NOTE
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
☐	**Deliverability & compliance monitoring**	**$300 / mo**	
☐	**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?

☐ GM Desk (Growth) ☐ GM Desk + Money & People (Full Engine) ☐ Not sure – recommend one

Which departments would you add first, and when? Anything about the packages 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.

[G] GM Desk (Growth) and up · [F] GM Desk + Money & People (Full Engine) · [+] department add-on, quoted separately

PART 1 -- YOUR JOB: THE FOUNDATION AND YOUR MORNING

- ☐ Your workspace, branded email and business phone, and the DMS data intake through a dealer-authorized connection such as DealerVault (Authenticom), or reports your office schedules where the DMS needs it; CIT and month-end come from your office's scheduled accounting reports [G]
- ☐ 7am DOC card by email, and by text once the store's business-texting registration clears: units, front and back gross, MTD pace vs forecast [G]
- ☐ Save-a-deal list by 8am: every unsold write-up logged in your CRM, with the reason entered and the salesperson; your managers pick the three to call [G]
- ☐ CIT list from your office's CIT schedule (cash waiting at the lender), with days aging, stips outstanding and lender; escalations at 5 / 10 / 15 days to F&I, the manager and you [G]

PART 1 -- YOUR JOB: THROUGH THE DAY

- ☐ Overdue-task count per salesperson and BDC agent from your CRM's task report, sent to the desk at the times your CRM can schedule it (we aim for noon and 5pm), so you coach the outliers instead of chasing everyone [G]
- ☐ New reviews pulled in: 4-5 stars get a drafted on-brand reply; 1-3 stars come to you with a drafted reply to approve [G]
- ☐ A low CSI score becomes a call task for you, with the deal details attached [G]
- ☐ Live dashboard on your phone for you and the dealer principal [G]
- ☐ Close-of-day recap (10pm by default, set by the store), by email, and by text once the store's business-texting registration clears: units, gross, appointments set / shown / sold, leads by source, reviews [G]

PART 1 -- YOUR JOB: YOUR WEEK

- ☐ The Monday GM report at 8am: source-to-sold, salesperson and BDC performance, service, website and ad results, written in owner language for you and the dealer principal [G]
- ☐ Lead-source spend vs sold: spend matched to tagged leads and DMS sales, cost per sold unit by source, so you decide what to cut [G]
- ☐ Save-a-deal meeting prep: open deals by stage, next action and days since last touch, in your inbox 30 minutes before the meeting [G]
- ☐ Aged-inventory list: used units at 30 / 45 / 60+ days and new units at 90 / 120+ days, with new days' supply by model; floorplan carry runs about $7.62 to $7.90 per vehicle per day (Harney Partners, 2025) [G]
- ☐ RDR check: sold units not yet reported, flagged from the DMS sold file to the title clerk with reminders until cleared; the clerk reports in the OEM portal [F]
- ☐ Floor coverage: appointments by hour vs staff on the floor, gaps flagged to the GSM [F]

PART 1 -- YOUR JOB: MONTH-END

- ☐ Month-end pack: DMS and accounting reports parsed – units, gross, F&I and expenses vs forecast, variances highlighted; the controller finalizes, you review [G]
- ☐ Forecast draft for next month: trailing-90 conversion by source and planned spend, salesperson targets pre-filled; you adjust and publish [G]
- ☐ Comp inputs: units, gross, CSI and appointment metrics per person pulled into your comp template, exceptions flagged; payroll approves [G]
- ☐ 20-group composite fields pre-filled from month-end data; you review and submit [G]
- ☐ Vendor invoices matched to results (leads, sold) in one table, underperformers flagged; you decide [G]
- ☐ Monthly compliance log: consent-capture rate, DNC scrub, opt-outs, Safeguards training due [G]
- ☐ OEM incentive and co-op claims: eligible units listed from the sold file, a checklist by deadline and reminders; the office submits in the portal [F]
- ☐ Floor-plan audit prep: inventory list with location and days, missing-unit exceptions and curtailment reminders; the office runs the audit [F]
- ☐ Commission worksheet that applies your written pay plans and your own pay trigger (delivered, posted or funded); payroll computes wages. Before the first live month we recompute one past month with your office and match every line; a monthly statement per rep and a 'needs attention' list [F]

PART 1 -- YOUR JOB: QUARTER AND YEAR

- ☐ Vendor contract renewals: a 60-day reminder with that vendor's cost-per-sold history attached; you negotiate or cancel [G]
- ☐ Annual marketing plan: the trailing-12 source-to-sold table and seasonality draft the plan; you set the budget [G]
- ☐ Handoff booklet documenting every automation so nothing depends on one manager's memory [G]
- ☐ Pay-plan review: per-person production trend and cost per unit by rep, pre-built; you decide [F]
- ☐ Safeguards Rule and OEM certification due dates: reminders, checklist, completion tracking [F]
- ☐ Multi-rooftop roll-up report for a dealer group [F]
- ☐ Monthly automation think-tank and priority support with a weekly call [F]

PART 1 -- YOUR JOB: CALIFORNIA CARS ACT (SB 766), FROM OCT 1, 2026

- ☐ CARS Act dashboard: first replies and live listings with the total price, blocked messages, signed add-on disclosures, overdue provider payments, 3-day cancellations (count, share of eligible sales, refund time, any over 48 hours) and deal record sets complete; cancellation denials and damage claims come to you and your counsel [G]

- [ ] Wall-sign and forms check: the 36-point 3-day cancel sign in every sales office, cubicle and signing room, and the new contract forms in use; audit date tracked with reminders [G]

PART 2 -- ADD THE REST OF THE STORE WHEN YOU'RE READY

Each department is an add-on, quoted separately. Each one plugs into the same system: its activity shows up in your 7am DOC card, close-of-day recap and Monday report, and each department manager gets their own daily list.

- ☐ Sales floor & BDC: every internet lead answered in under 60 seconds, round robin with a claim window, missed-call text-back, confirmations and no-show re-book, the 30-day Unsold Board and be-back recovery, and a fenced after-hours assistant [+] department add-on
- ☐ F&I & the desk: stip checklist and customer reminders with secure upload, declined-product follow-up the F&I director approves, and the Not-Approved-Today lane with a partner counter card handed over in person [+] department add-on
- ☐ Service-to-sales & retention: service appointments matched to equity and lease maturity, lease pull-ahead at 90 / 60 / 30 days, trade-cycle outreach, post-delivery review request and first-service booking, database re-activation [+] department add-on
- ☐ Inventory & local presence: Marketplace and social posting from the inventory feed, just-arrived and price-drop alerts, the weekly specials email on your approval, Google Business Profile posts, aged-unit price moves [+] department add-on
- ☐ Partners & recruiting: partner lanes with tagged links, QR counter cards and monthly partner statements, partner outreach, and a recruiting funnel for salespeople, BDC agents and F&I managers [+] department add-on

Top pick #1 | **Top pick #2** | **Top pick #3**

Anything you want that isn't on the list

13. Compliance & Consent

Dealer marketing is regulated by the FTC, the state, and the OEM. We build the guardrails in; you tell us your rules. The system tracks, reminds and reports; the dealer and its counsel make compliance decisions. Not legal advice.

Which apply to you?

- ☐ TCPA texting consent required
- ☐ Do-Not-Call scrub
- ☐ FTC Act Section 5 advertising rules (price / availability)
- ☐ State dealer advertising rules (license #, doc fee, 'plus fees')
- ☐ OEM brand standards / co-op pre-approval
- ☐ ECOA / fair lending (no 'everyone approved')
- ☐ Reg Z / Reg M trigger terms on payment ads
- ☐ GLBA Safeguards Rule (customer data, MFA, roles)
- ☐ Recorded-call disclosure
- ☐ Email CAN-SPAM opt-out
- ☐ Business texting registration (no finance words in sample messages)
- ☐ California CARS Act (SB 766), from Oct 1, 2026: total price in ads and first written replies
- ☐ CA: 36-point 3-day cancel sign in every sales office, cubicle and signing room
- ☐ CA: new contract forms; the paid 2-day cancellation option ended Oct 1, 2026
- ☐ CA: add-on 'not required' disclosure, no-benefit add-ons, providers paid in 10 days
- ☐ CA: records kept 2 years (ads, written messages, deals, cancellations, complaints)

Other:

Is the team currently allowed to text customers, and from what numbers?	☐ Yes	☐ No
Do your web forms and credit apps capture written consent to text and call?	☐ Yes	☐ No
Does anyone (dealer principal, OEM, attorney) review marketing before it goes out?	☐ Yes	☐ No
Are MFA and per-user roles enabled on your CRM?	☐ Yes	☐ No
California stores: are the new 36-point signs up and the new contract forms loaded?	☐ Yes	☐ No
California stores: has your counsel decided on the doc fee in the total price and on 2-4 unit business deals (fleet)?	☐ Yes	☐ No

Compliance officer / attorney (name, email) | **Turnaround needed for approvals** | **Qualified Individual (Safeguards Rule) name**

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

- ☐ Units & gross, MTD pace vs forecast
- ☐ Cost per sold unit by source
- ☐ Salesperson and BDC performance
- ☐ Unsold follow-up contact rate
- ☐ California: CARS Act dashboard
- ☐ Contracts in transit (count, days aging)
- ☐ Aged inventory / days supply
- ☐ Leads by source and speed to first response
- ☐ Service-to-sales conversions
- ☐ F&I PVR and product penetration
- ☐ CSI / reviews
- ☐ Appointments set / shown / sold
- ☐ Partner referrals

Other:

How do you want us to communicate during the build?

☐ Text ☐ Email ☐ Weekly call ☐ Shared doc ☐ In person

15. Access Checklist

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

- ☐ CRM admin login (or add us as a user) and lead-routing settings
- ☐ Third-party lead provider ADF/XML email addresses
- ☐ DMS export of sold and service customers (CSV)
- ☐ Google Business Profile manager access
- ☐ Business email hosting admin (for branded email + calendars)
- ☐ Logo files, headshots, OEM brand guide
- ☐ Existing phone numbers to port or forward
- ☐ Website provider login / form and chat lead routing
- ☐ Inventory feed (CSV / FTP / API)
- ☐ Facebook Business Manager + page admin
- ☐ Google Ads / other ad accounts
- ☐ Domain registrar / DNS login
- ☐ Dealer license #, EIN, legal address, and website with privacy policy (required for business texting registration)
- ☐ Review-site links

Anything else we should know before we start?

Systems, and how we get access

Where a system lets you add us as a user with our own login, you do that. Where it connects by sign-in, you sign in and click Allow. Anything else we set up live with you on a screen share.

SYSTEM	WEB ADDRESS	HOW WE GET ACCESS	WHO ON YOUR SIDE ADDS US
CRM (VinSolutions, eLead, DealerSocket, DriveCentric		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
DMS (export access only)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Website provider		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Inventory / pricing tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
OEM dealer / lead portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Autotrader dealer portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Cars.com dealer portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CarGurus dealer portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Chat / texting tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Phone system / call tracking		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Service scheduler		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Reputation / reviews tool		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
DealerRater	dealerrater.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Facebook Business Manager	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Ads	ads.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Business email admin (Google or Microsoft)	admin.google.com / admin.micros	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Domain registrar & DNS		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	

We never ask for or store passwords.
You stay in control and can remove our access at any time.

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

Your agreement and invoices come from Everborn Marketing LLC dba Everborn Productions.

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			