



**MAGNUS**  
AUTOMATION

INTERNAL SALES FIELD GUIDE

# The Magnus Offering Bible

*Everything we sell, why it wins, and how to make the "yes" impossible.*

We don't rent people software and walk away. We deliver the outcome — every call answered, dead revenue revived, reputation lifted, and a business given room to grow.

START HERE · THE ONE TRUTH

# Three industries. One wound.

Home services, accounting firms, and dealerships look nothing alike. They bleed from the exact same place: demand they already paid for, leaking out the door before it becomes revenue. Our whole pitch starts with one question — **"How many calls did you miss last month, and what's a booked job worth to you?"** Every vertical says yes to that math.

**27%**

of inbound calls to home service businesses go unanswered on average — higher in peak season.

**56–60%**

of dealership leads arrive after hours. Most callers who hit voicemail call a competitor within 30 minutes.

**#2**

Managing client communication is now the second-biggest challenge accounting firms name — up from #4.

## Why the leak is invisible to the owner

- Less than 3% of callers pushed to voicemail during a sales call leave a message. The lead vanishes — no trace on any report.
- Speed decides everything: businesses that answer within 5 minutes convert leads at up to **8×** the rate of those that take 30.
- Owners keep buying more ads to fix a conversion problem. We fix the conversion, so every ad dollar finally lands.

### THE MAGNUS WEDGE

**They sell software you operate. We deliver the outcome, done by AI.**

The big platforms hand a business a tool — and the owner still has to answer the phone, work the leads, and chase the reviews himself. Magnus's AI agents do the work. That isn't a feature difference. It's a different category. Lead with it every time.

## THE MAGNUS STACK

# One AI spine. Four stages of impact.

Everything below runs on one industry-agnostic engine — Retell voice, GoHighLevel CRM, and n8n orchestration. Only the qualification logic changes per trade, so adding a module to a live client costs us almost nothing and stacks value fast.

## 01 · CAPTURE

## Never miss again

- 24/7 AI voice receptionist — answers, qualifies, books
- Instant missed-call text-back
- Speed-to-lead: replies under 60 seconds
- Instant bilingual switching (EN / ES)
- Spam & robocall screening
- After-hours & overflow coverage

## 02 · CONVERT

## Turn intent into jobs

- Smart reminders (show-rate 60% → 85%)
- Lead routing & live qualification
- Pipeline write-back into their CRM
- Human hand-off with full context

## 03 · RETAIN

## Mine what they own

- Database reactivation — wake the dead list
- Review generation & monitoring
- Invoice & payment follow-up
- A2P 10DLC registration & approval

## 04 · GROW

## Fuel the next level

- ReputationPulse (reviews engine)
- CrewCast (branded content channel)
- Magnus Studio (rebrand & presence)
- Referral engine

### A2P 10DLC Registration & Approval — done for you

Carriers now block or filter business texts that aren't registered. Magnus registers each client's brand and campaign with the carriers and gets the messaging **approved** — so every text lands: missed-call text-backs, reminders, database reactivation, and message-to-owner alerts. No filtered messages, no legal exposure. **Magnus is A2P 10DLC approved and compliant**, so we set clients up the right way from day one.

### The instant-cash module: Database Reactivation

The fastest money in the whole stack. Home service companies can pull **18–32% of annual revenue** from their existing database without buying a single new lead — at \$8–\$40 per recovered job versus \$80–\$240 cold. One real campaign texted ~4,000 dormant contacts and booked **78 appointments in three days**. This is what pays for Magnus in week one.

## THE VERTICALS

# Same spine, tailored to the trade.

The AI receptionist is industry-agnostic — only the qualification logic changes per trade. We lead with two front-line verticals and stack the rest as expansion, once the machine is proven.

## Home Services · FRONT LINE

**The pain:** techs are on the roof, not on the phone; peak-season calls spill to voicemail; ad spend wasted on unanswered leads.

**Modules that land:** 24/7 receptionist, missed-call recovery, CompanyCam photo → CRM bridge, seasonal maintenance reactivation, review engine.

## Accounting & Bookkeeping · FRONT LINE

**The pain:** clients now demand proactive, fast, personal communication; endless document-chasing and deadline reminders eat billable hours.

**Modules that land:** client onboarding automation, document-request sequences, deadline & appointment reminders, advisory-upsell nurture, AR follow-up.

## EXPANSION VERTICALS · SAME ENGINE, APPROACHED ONCE THE MACHINE IS PROVEN

## Professional Services NEXT WAVE

**Legal** — high-value intake, after-hours consults; **med spas & aesthetics** — cash-pay, booking-driven; **real estate & property mgmt** — showings, maintenance; **insurance** — quotes, renewals. Highest-value expansion — one missed legal intake can be worth tens of thousands.

## Dealers & High-Ticket Inventory

Auto, powersports, marine, and RV dealers — plus any business with a service bay. AI BDC for sales + service, after-hours capture, recall & maintenance campaigns, DMS/CRM write-back. Real demand, but competitive and a longer sale — so we open it from a position of proof.

Also fits any phone-driven, booking-based, review-dependent business: veterinary, chiropractic & physical therapy, salons & med-fitness, MSP / IT, mortgage & financial advisors. **Compliance flag:** dental, medical & vet mean HIPAA/PHI — doable, but we lead with legal, med spa, real estate & insurance first, where there's no such gate.

# We don't just plug leaks. We build the whole storefront.

Half these owners are world-class at their craft and invisible online — no logo, a website frozen since 2022, dead social pages, a thin Google profile. Magnus becomes their one-stop shop: websites, brand, software, and a presence run by AI. We make them look like the leader they already are — and it's the on-ramp that makes every other module convert better.

**01**

## Modern Website

Fast, mobile, built to book — with the AI receptionist and CRM wired in from day one. Not a brochure. A machine that captures.

**02**

## Brand & Logo Identity

A clean, credible mark and color system that finally matches the quality of their work. First impressions, fixed.

**03**

## AI Social Media Manager

Claude writes the content and the monthly calendar; it auto-publishes to Facebook, Instagram, Google, and LinkedIn through their CRM — consistent presence, no new hire, one approval tap.

**04**

## Google & Local Presence

Business Profile, listings, photos, and messaging tuned so they win the click before the phone ever rings.

### THE ONE-STOP SHOP ADVANTAGE

## One partner for websites, software, brand, and presence.

The big brothers sell a single tool and leave the owner to stitch the rest together from five vendors. Magnus is the whole stack under one roof — capture, convert, retain, grow, and the storefront that ties it together. Sell Studio as the **entry wedge** for the owner with a dead site, or as a **grow add-on** once the receptionist is producing. Read the client — both doors lead inside.

## END-OF-FUNNEL UPGRADES

# The bolt-ons that make leaving painful.

Once the money modules are producing, these two raise lifetime value and lock the client in. Sell them **after** the guarantee has proven itself — never as the opener.

## ReputationPulse — the reviews engine

Automatic review requests at the perfect moment, monitoring across platforms, and instant response. Reputation *is* demand in local services — nearly every buyer reads reviews before they call.

**Pricing:** \$99/mo standalone. Magnus bundle **\$75/mo** (25% loyalty discount). Hold **\$60/mo** as a closing lever — earned by annual prepay or 3+ modules. Never the default.

## CrewCast — the branded channel

We help the owner build a small, engaged content channel — a voice their customers actually follow. When someone hears you every week, they feel they know you, and trust compounds.

**Sell it honestly:** a **retention & authority** play, not a lead faucet. Audiences build slowly. Position it as "we make you the local name people stay loyal to" — the deepest hook, added last.

## THE OFFER THEY CAN'T REFUSE

"In your first 30 days, we'll recover more revenue from the dead leads already sitting in your system **than our fee costs** — or month one is free."

Database reactivation makes this safe to give, because it reliably books jobs in days at near-zero cost. Your team never sells "AI." They sell **"let us show you the money already hiding in your business — guaranteed."** A far easier yes.

## EXECUTIVE WORKFLOW

# The report that renews the contract for you.

Every Monday morning, the owner gets one branded digest at the highest level — not activity, but **money and risk**. Negative reviews escalate to them the instant they land. This is what keeps Magnus indispensable and makes renewals automatic.

## What lands on the owner's desk

- **Revenue recovered this week** — missed calls + reactivation bookings, in dollars.
- **Jobs won** and appointments set vs. leads handled.
- **Speed-to-lead** per location, flagged if it slips.
- **Per-client ROI scorecard** — our fee vs. revenue we generated.

## Risk escalated instantly

- **Negative reviews** — straight to the owner, in real time.
- **Hand-off failures** — when AI passes a lead to a human and it's dropped.
- **Churn early-warning** — any client whose booked-jobs falls two weeks running.
- **Integration health** — silent breakages caught before they cost a job.

## THE DASHBOARD, REIMAGINED

## A command center that looks like 2026, not 1922.

Each client logs into a branded Magnus dashboard on our own domain — revenue, bookings, reviews, an "awaiting your approval" number, and pipeline in one clean view, with GoHighLevel as the hidden engine feeding it live. Branded, role-locked dashboards cut client churn to roughly half that of PDF-report clients. It gives the owner a reason to log in and *feel* the results — without ever calling us.

WHERE THE BIG BROTHERS FAIL · PART 1: THE SOFTWARE GIANTS

# We don't compete with them. We cover what they miss.

ServiceTitan and Housecall Pro are the giants of home-services software. They're powerful — and they leave enormous gaps wide open. (All points reflect patterns widely reported across G2, Capterra, BBB, and Reddit.)

| THE GAP          | THE BIG BROTHERS                                                                                                                                              | MAGNUS COVERS IT                                                                              |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Who they abandon | ServiceTitan is built for 20+ techs and has stated it isn't optimized for shops with 3 or fewer. Small operators are turned away or overwhelmed.              | The small & mid-size business they ignore is our core client — live in days, not left behind. |
| Cost & lock-in   | \$250–\$500 per tech/month, \$5K–\$50K implementation, 6–12 month onboarding, multi-year contracts, termination fees users report at \$24K–\$50K+.            | Low cost, fast deploy, no hostage contracts. They pay for outcomes, not a two-year sentence.  |
| The add-on trap  | Housecall Pro's #1 complaint: surprise add-on fees. The base plan lacks features owners consider non-negotiable.                                              | One clear bundle. The value is stacked in, not paywalled out.                                 |
| Depth & support  | HCP "tries to serve too many industries" with a CRM that's "a contact list with job history." Support sentiment is sliding — lower tiers report AI-only help. | Purpose-built agent teams per vertical, with a real human backstop that never disappears.     |
| Cross-vertical   | Both are home-services only. They can't touch accounting or dealerships.                                                                                      | One spine serves home services, accounting, professional services, and dealers alike.         |
| Tool vs. outcome | They rent you software and walk away. You still do the work.                                                                                                  | Our AI does the work — answering, booking, reviving, following up — done-for-you.             |

**The three things none of them do:** (1) a true 24/7 AI voice agent that answers, qualifies, and books · (2) reactivate the client's dead database *for* them as a service · (3) serve more than one industry. That whitespace is Magnus.



## WHERE THE BIG BROTHERS FAIL · PART 2: RECEPTIONISTS, REVIEWS &amp; POINT TOOLS

# The closer they are to us, the wider the gap.

Beyond the software giants sit the answering services, the review platforms, and the single-trick vertical tools. Each is closer to what Magnus does — and each leaves a gap you can drive a truck through.

## THE SUCCESS TAX

### Receptionist services

Smith.ai, Ruby, PATLive bill per-call or per-minute with overages — so the busier your client gets, the more they pay. Ruby rounds up to the next 30 seconds and even bills for spam and wrong numbers; Smith.ai adds a \$3 live-handoff fee. Humans can't scale to seasonal spikes — they queue or miss.

**Magnus: flat-rate, unlimited, no penalty for growth — and it's the whole front office, not just call-answering.**

## THE CONTRACT TRAP

### Review platforms

Podium starts at \$399/mo but most land at \$500–\$800 after add-ons, on annual auto-renewing contracts that are hard to cancel — its AI reply feature is a separate \$99/mo. Birdeye is pushing upmarket, leaving small shops paying enterprise rates for a tool not built for their day.

**Magnus: reviews bundled at \$75, one system, no separate vendor, no lock-in, no success tax.**

## THE SILO

### Vertical point tools

Every trade has its own one-trick tool — Slang.ai for restaurants, Numa for auto, Weave for dental, Rosie for home services, Smith.ai for legal. One vertical, one function each. The owner ends up stitching five vendors together.

**Magnus: one cross-vertical engine and the full stack — capture, convert, retain, grow, studio — under one roof.**

## THE REAL MOAT

# The software is the rails. The service is the product.

The "all-in-one app, free tier, no contract" crowd is multiplying fast — which proves the thesis but commoditizes the software. So Magnus never competes as another login. Our moat is **done-FOR-you**: AI agent teams doing the actual work, the 30-day recovery guarantee, a human backstop, and a local partner who answers. That's the one thing the free-tier crowd can't copy.

THE MAGNUS CREED

# We fix where the money leaks. Then we build the road up.

*Every call we answer is a door someone didn't know was closing.*

*Every dead lead we wake is a handshake they already earned.*

*Every review we lift is a stranger deciding to trust them before they've even met.*

**We are not here to replace anyone's people.**

We're here to hand them back their evenings — to take the ringing phone off their shoulders, so the humans in the business can do the human things: build, fix, care, close. A machine should carry the weight. A person should carry the meaning.

*The big brothers count a business's money and call it care.*

*We count what that business could become.*

Fixing what's broken is where they stop. Growing what's possible is where **Magnus** begins. We don't just seal the leak where the money slips out — we build the pipe that carries them higher. That's the part the giants never gave a damn about. It's the only part we're built for.



— Magnus Automation