



Request for Bid (RFB)

Issued by: Crankshaft AI

Location: Phoenix, Arizona

Date: 10/10/2025

1. Introduction

Crankshaft Technologies, LLC ("Crankshaft") is a technology startup headquartered in Arizona, specializing in artificial intelligence solutions for the **Pay-Per-Call (PPC)** industry. We deliver end-to-end, data-driven systems that optimize call quality, compliance, and profitability for sales teams and call centers.

Crankshaft invites qualified **call center partners** to submit bids for collaboration under our **Final Expense Live Transfer Program**. This partnership opportunity offers a unique integration of AI-powered intent scoring, call quality monitoring, and telecom infrastructure designed specifically for PPC operations.

2. Scope of Work

The selected partner(s) will generate **live transfers** in the Final Expense insurance vertical using Crankshaft's proprietary technology stack.

Crankshaft Provides:

- **Fully Featured Dialer Platform (Vici-based):** Self-hosted, managed, and optimized for PPC operations.
- **Adjustable Auto-Dialer:** Maximizes outbound throughput while minimizing dropped calls.
- **Rolling Local Presence:** Ensures all calls appear from local numbers, improving pickup rates.
- **Full VOIP Service:** U.S.-based A-Level SHAKEN/STIR registration ensures carrier-level trust and prevents spam labeling.



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- **High-Fidelity Bridging:** Nearly lossless call transfer quality for improved comprehension and conversion, especially for senior clients.
 - **Integrated Call Tracking & Distribution:** Built-in intelligent routing with pre-connection notifications to sales agents, minimizing no-answer rates.
 - **Real-Time AI Quality and Intent Scoring:** Pre-transfer verification ensures compliant, high-intent, and fraud-free connections.
 - **Secure Call Recording:** Comprehensive recording and archival system for compliance and quality assurance.
 - **Agent Monitoring & Analytics:** Real-time dashboards offering insight into performance, skill gaps, and training opportunities.
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3. Partnership Advantages

Crankshaft is committed to long-term, transparent, and profitable relationships with its call center partners. Key benefits include:

- **No-Cost Technical Infrastructure:** Crankshaft provides a pre-configured Vici dialer, VOIP service, and local presence numbers at no charge.
- **Pay-Per-Lead Model:** Partners are compensated for all accepted transfers that meet quality criteria—regardless of agent conversion performance.
- **Weekly Payments (Net 7):** Payments are issued every Monday
- **Payment Guarantee:** Crankshaft assumes full payment responsibility; call centers are not affected by downstream buyer defaults.
- **Fraud Detection & Dispute Resolution:** AI-driven systems automatically identify coached, synthetic, or fraudulent calls, ensuring transparent billing.
- **Long-Term Stability:** Crankshaft's AI scoring enhances buyer satisfaction and retention, securing sustained call volume for high-performing centers.
- **Training & Support:** Weekly performance reports, scripts, call analysis and coaching recommendations provided at no additional cost.



Screen Shot of Call Center Agent Monitoring Dashboard



- **Ethical Business Practices:** Crankshaft is fully owned and managed by licensed professionals. Founder **Christopher Monski (NMLS #1471192)** maintains a spotless personal record and reputation for timely, transparent business operations.

4. Bid Requirements and Operational Terms

Operational Guidelines

- **Vertical:** Final Expense Insurance all 50 states



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- **Dialing Platform:** Crankshaft Vici Dialer (use of external dialers not permitted)
 - **Resources Provided by Partner:** Labor and data
 - **Resources Provided by Crankshaft:** VOIP, dialer, and A Level anti spam local presence numbers (no cost)
 - **Compensation is per transfer:** Based on approved and quality-passed live transfers exceeding 3 minutes
 - **Trial Phase:** Initial deployment limited to up to five (5) agents; expansion upon performance review
 - Call Center partners will provide a google sheet with transfers and basic info for clients.
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5. Quality and Compliance Standards

Each transferred call must meet **Crankshaft's Quality Verification Criteria** (accuracy rate 99%+):

Verification Item	Requirement
Full Name	Clearly stated
Age	45–75 years
Location	State and town confirmed
Decision Maker	Must confirm authority over financial decisions
Health Status	No major disqualifying conditions (stroke, heart attack, etc.)
Physical Condition	Not using oxygen, wheelchair, hospitalized, or in a nursing home
Banking Information	Must have a checking/savings account
Interest in Quote	Expressed clearly
Budget	Comfortable with \$40+/month
Consent	Verbal consent to be transferred
TCPA Compliance	Agrees to be contacted despite Do Not Call status

Intent & Fraud Screening



AI intent analysis must confirm:

- No coached or rehearsed responses
- No synthetic or AI-generated voice
- No litigator or hostile profile indicator

Third Party checks 100% accuracy for compliance reasons.

- DNC call list ❌
- If DNC =yes then the lead must be verified
- Jornaya ✅
- Trusted Form ✅
- Litigator List ❌



Call Center Facing Screenshot:

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CALL ASSESSMENT
AUTOMATED QUALITY VERIFICATION

Lead ID: 5403 | Agent: 007 | Recording: 20250925-208429_6464681111

✓ **APPROVED**

TRANSFER SCORE
94%

QUALIFIERS

- ✓ TCPA Time Window
- ✓ DNC Compliance
- ✓ 45-75 years old
- ✓ Full Name
- ✓ State & Town
- ✓ Financial Decision
- ✓ No Medical Conditions
- ✓ Independent Living
- ✓ Bank Account
- ✓ Consent Recording
- ✓ Intent to Purchase

DISQUALIFIERS

- ✗ Fraud/Coached Call
- ✗ Rehearsed/Litigator
- ✗ AI/Synthetic Voice
- ✓ Skepticism

Transfer Token: 69EA38854D
Ready to transfer to sales agent.

TRANSFERRING...

Note: Jornaya/Trusted form Spoofing or falsifying lead origin (VPN-based form fills) will result in immediate termination and permanent ban from Crankshaft Marketplace.

6. Data and Compliance Management



- All lists must be scrubbed against the National Do Not Call (DNC) Registry prior to dialing.
 - Crankshaft offers optional DNC scrubbing services at a nominal fee per record.
 - Noncompliance or intentional DNC violations will result in immediate termination.
 - Call recordings, accepted/rejected/billable reports, and quality assessments will be made available via Crankshaft's secure partner portal.
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7. Payment and Reporting

- **Billing Cycle:** Weekly (Net 7)
 - **Payment Day:** Mondays
 - **Portal Access:** Admin and performance reports provided daily.
 - **Trial Period:** Up to 5 agents, scaling with consistent performance
 - **Performance Bonus:** Call centers that achieve consistent high quality scores will be given a per transfer bonus on ALL transfers. Essentially if Crankshaft can charge a market premium for high converting calls, we will increase the price paid per transfer. Performance Bonus can be as high as 25% for exceptional industry leading quality. The performance bonus is not subjective, measured by actual performance over a monthly basis, and paid monthly.
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8. Submission Instructions

Interested call centers should submit proposals that include:

1. Company background and operational capacity
2. Current agent count and experience level
3. Proof of TCPA and DNC compliance processes
4. Estimated daily call volume capacity



Submit all proposals to:

bids@crankshaft.ai

Subject Line: **RFB Submission – Final Expense Live Transfer Partnership**

9. Evaluation Criteria

Bids will be evaluated based on:

- Compliance and operational readiness
- Experience in insurance live transfer verticals
- Data Source
- Volume scalability
- Demonstrated commitment to quality and ethical conduct
- Price per transfer, Expected Bid is \$15-\$25 per transfer accounting for the fact that Crankshaft is providing Dialer and VOIP. Crankshaft will award contract based on price and call samples, call center experience, and reputation. \$15-25 is an estimated range and call centers are free to bid above or below that range and should choose a competitive price point.

10. Contact Information

Crankshaft.AI

Christopher Monski, CEO

Whatsapp 480-438-9694

Attn: Bid Review Phoenix, Arizona

Email: bids@crankshaft.ai

[\[www.crankshaft.ai\]](http://www.crankshaft.ai)



Empathic FE Live Transfer Script

Agent:

“Hi [First Name], this is [Agent Name]. I’m reaching out because you were looking online at final-expense insurance—coverage to help with funeral and burial costs.

Did you already get that taken care of, are your loved ones protected, or are you still exploring quotes?”

(Pause, listen, acknowledge)

“That makes sense—I completely understand. My job today is just to confirm a few details and then connect you with a licensed agent who can give you a personalized quote. Does that sound okay?”

Banter & Rapport (Choose 1–2 naturally)

- **Weather/Location:**

“How’s the weather out your way today? We’ve been [hot/rainy/etc.] here, so I always like to compare.”

“I hear [their state] has some beautiful [falls/springs/sunsets]. Have you noticed that this year?”

“Which part of [state] are you in? I’ve been talking to folks in [city/state capital] lately.”

- **Day/Routine:**

“How’s your day been going so far?”

“Did you get to do anything fun this past weekend?”

- **Local Connection:**

“Are you in [city] or nearby? I’ve heard great things about [local landmark/sports team].”

- **Family/Light Personal:**

“Do you have family close by or more spread out?”

“Any grandkids keeping you busy these days?”

(Use their answers as bridges—if they mention family, town, pets, etc., lean in with curiosity. This shows empathy and builds trust.)



Qualification Questions (Casual Flow)

(Keep conversational, not like a checklist. Sprinkle in empathy statements such as “I understand” or “Got it, thank you for sharing.”)

1. “Just so we get this right, may I confirm your full name?”
2. “And you’re in [City, State], correct?”
3. “Can I confirm your date of birth?”
4. “Are you generally responsible for your own finances?”
5. “Any major health concerns recently—like a stroke, heart attack, or cancer?”
6. “Are you currently hospitalized, in a nursing home, or on hospice care?”
7. “Do you use a wheelchair, oxygen, or dialysis right now?”
8. “Different carriers have different payment requirements—do you have a checking or savings account you’d use for coverage if you qualify?”
9. “These programs are designed to be affordable for folks on fixed incomes. Would you feel comfortable if your plan was in a budget-friendly range, say \$30–50 a month?”
10. “Before I connect you, I do need to mention this call is recorded for quality and compliance. Is that okay?”

Permission to Transfer

Agent:

“Perfect, thank you for sharing that with me. It sounds like you’re open to hearing your options, which is great.

With your permission, I’ll transfer you directly to a licensed agent in [State] who can review specific prices and benefits with you. May I connect you now?”

(If yes)

“Wonderful—it’s been great talking with you. I’ll stay on the line until the agent picks up so you’re not left hanging.”

[TRANSFER]



Key Empathy Enhancements

- Use *acknowledgments* (“I completely understand,” “That makes sense,” “I appreciate you sharing that”).
- Keep *curiosity tone*—ask about what they offer (family, pets, town) rather than forcing rapport.
- Avoid interrogative delivery—*space out qualification questions* with small rapport touches.
- Always frame the transfer as *helpful, not pushy*.

Over all notes: Tone is very important. How we say something is half as important as what we say



Voice & Delivery

- **Warmth first:** Smile before you speak. It literally changes your tone and makes you sound more approachable.
- **Pace naturally:** Avoid rushing through your script. A slower, calm pace conveys patience and confidence.
- **Pause for them:** Let silence work. If they hesitate or give a short answer, don’t jump in too fast—pause so they feel safe to elaborate.



Word Choice & Phrasing

- **Acknowledge their situation:** Use phrases like “I completely understand,” “That makes sense,” or “A lot of people I talk to feel the same way.”
- **Soften transitions:** Instead of “I need your information,” try “Just to make sure I get you the right help, may I confirm a couple quick details?”
- **Personalize small touches:** Repeat their name occasionally and tie back to what they’ve said (“Glad to hear your weather’s nice in Dallas today, John.”).



Building Connection in Seconds



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- **Find a human bridge:** Weather, family, or location are easy openers to relax them before moving into insurance talk.
 - **Empathy statements:** If they mention cost worries or family, validate it:
 - “That’s exactly why most folks look into final expense plans—just making sure loved ones aren’t left with the burden.”
 - **Respect resistance:** If they’re hesitant, don’t bulldoze. Say: “I get it, it can feel like a lot of calls. I’ll be quick and just connect you with someone who can answer questions directly.”
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Framing the Transfer with Empathy

- Position yourself as a **helper, not a closer**. For example:
 - “I’m not here to sell you anything—my job is simply to make sure you talk to the licensed agent who can give you real options.”
 - Give control: “If it’s okay with you, I’ll connect you now—it’ll just take a moment.”
 - Reassure value: “They’ll be able to show you exactly what fits your budget, so you’ll know your loved ones are taken care of.”
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✓ Bottom line: **tone + pacing + acknowledgment** make the difference. Even from cold data, if the person feels you’re listening and not pushing, they’re much more likely to stay on and take the transfer.



Live Transfer Objection Cheat Sheet

1. Already Have Coverage

- **Acknowledge:** “I understand, many folks I talk to already have something.”
- **Reframe:** “People still compare—sometimes they save money or get extra benefits.”
- **Ask:** “Would you like me to connect you so they can double-check if yours is the best fit?”

2. Don’t Want to Give Info

- **Acknowledge:** “I hear you, I respect that.”
- **Reframe:** “I only confirm a couple basics so the licensed agent knows who they’re speaking with.”
- **Ask:** “Would you feel okay just confirming [name, city/state, birthdate] and leaving the rest for the agent?”

3. Can’t Afford It

- **Acknowledge:** “I completely get that—most folks are on fixed incomes.”
- **Reframe:** “These plans are designed to be budget-friendly, often starting around \$30 a month.”
- **Ask:** “Would you like to hear the lowest-cost options and see if one fits your budget?”

4. No Time Right Now

- **Acknowledge:** “I understand, life gets busy.”
- **Reframe:** “The agent’s part is usually just a few minutes to show you options.”
- **Ask:** “If I connect you now, would you have a moment to hear the numbers?”

5. Not Interested

- **Acknowledge:** “I hear you, and I don’t want to bother you.”
- **Reframe:** “You had shown interest online, and my role is just to connect you for answers.”
- **Ask:** “Would you be open to a quick transfer so you can decide with all the info?”



Formula Reminder



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Acknowledge → Empathize → Reframe → Ask Permission Again

Keep it calm, warm, and conversational. You're not selling—you're *helping them talk to the right person*.