PREPARED FOR PETERSON

A shared relationship platform for sales and leasing.

HubSpot implementation, team enablement, and launch support for Peterson's residential sales and leasing teams.

Prepared by: Dave Betcher | Betcher Consulting Group

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Investment: $8,000 CAD plus applicable taxes

01 EXECUTIVE OVERVIEW

One relationship platform, two distinct customer journeys.

This engagement establishes HubSpot as a shared relationship platform for Peterson, with separate sales and leasing processes, clear project ownership, consistent follow-up, and practical management reporting.

The implementation follows a phased approach: agree the process, configure the CRM, prepare and migrate the approved data, build and test customer journeys, then train the team and launch. The initial rollout will focus on the projects, users, and workflows agreed before kickoff, with a structure that can support future growth.

One shared CRM Separate sales and leasing processes built on one contact database.	**Consistent follow-up** Clear project ownership and reliable appointment follow-up.
Initial AI pilots One website customer-agent pilot and one AI-assisted nurture pilot.	**Reporting and adoption** Core dashboards, role-based training, and the Peterson Success Center.
Milestone-based delivery Four phases, each completed against an agreed threshold.	

INTENDED OUTCOMES

- Faster and more consistent inquiry handling.
- Better visibility into prospect activity.
- Reliable appointment follow-up.
- Clearer reporting from initial inquiry through purchase or lease.

INVESTMENT SUMMARY

Total implementation

$8,000 CAD plus applicable taxes

Payment

Four milestone installments of $2,000 CAD

HubSpot software is purchased separately.

Integration discovery is included; development is scoped separately.

See the full investment details

02 DISCOVERY AND IMPLEMENTATION SCOPE

Agree the process before configuring the system.

Working sessions will confirm the initial projects and rental properties, participating teams, current systems, source data, customer journeys, and reporting priorities.

DISCOVERY WILL ADDRESS

- Prospect funnel structure
- Appointment booking
- Website assistance
- Lists and qualification
- Daily traffic reporting
- Handoff of purchaser information to contract management

HOW SCOPE IS SET

1. Before kickoff	2. During discovery	3. If more work is identified
Peterson and Betcher Consulting Group agree the launch project list, source datasets, and allowances for forms, templates, workflows, dashboards, and training sessions.	Discovery validates these assumptions and produces an approved implementation blueprint.	Any expansion is documented and approved before additional work begins.

03 CRM ARCHITECTURE AND ACCOUNT SETUP

One contact database, separate opportunities, clear ownership.

One contact database will support separate purchasing and leasing opportunities, with project-specific information and accountable owners.

Component	Proposed approach
Contacts	One record per person, with relationship history and communication preferences.
Opportunities	Separate deal records for each purchasing or leasing journey.
Pipelines	One residential sales pipeline and one leasing pipeline.
Projects and properties	A consistent project structure linked to contacts and opportunities. A custom object will be used only if supported by the selected subscription and agreed requirements.
Ownership	Individual opportunity owners, project teams, and backup coverage rules.
Daily workspace	Saved views, tasks, qualification fields, next steps, and appointment outcomes.

CONFIGURATION INCLUDES

- Account settings and agreed user permissions
- Lead sources and lifecycle definitions
- Duplicate management rules
- Naming conventions
- Subscription preferences

04 DATA PREPARATION AND MIGRATION

Clean, mapped, and reconciled data.

The agreed source datasets will be reviewed, mapped, cleaned, and imported into HubSpot.

PREPARATION INCLUDES

- Project associations and ownership

VALIDATION

- Statuses and available history
- Legacy identifiers
- Unsubscribes and suppression information

- A sample import is reviewed before the full migration.
- Record counts and key fields are reconciled.
- Exceptions and export limitations are documented.

Historical reconstruction beyond the agreed exports is separately scoped.

> Marketing-contact status will be managed separately from communication permission. Segmentation and audience controls will help Peterson maintain a relevant marketing audience within its selected subscription tier.

05 SALES AND LEASING JOURNEYS

Two journeys, given equal care.

Sales and leasing will share customer history while maintaining distinct stages, ownership, follow-up, and reporting. Proposed stages will be confirmed during discovery.

RESIDENTIAL SALES

- New inquiry
- Engaged and needs identified
- Appointment scheduled
- Appointment completed
- Actively considering
- Reservation or offer in progress
- Under contract
- Closed or homeowner
- Closed lost

LEASING

- New rental inquiry
- Requirements confirmed
- Tour scheduled
- Tour completed
- Application invited or submitted
- Application review or approval milestone
- Lease signed
- Moved in or resident
- Closed lost or withdrawn

CONFIGURATION WILL COVER

- Online and walk-in registrations
- Project routing
- Owner notifications
- Qualification fields
- Calendar connections and scheduling links
- Appointment outcomes
- Dated next steps

BOUNDARIES

- Long-term nurture will be tracked separately from active opportunities.
- Application screening, contract execution, accounting, and resident operations remain in the appropriate operational systems.

06 WEBSITE CAPTURE AND FOLLOW-UP AUTOMATION

Every inquiry arrives with its context.

The agreed website forms and tracking will capture project interest, inquiry source, and relevant customer preferences. Existing websites can remain in place, with website-team coordination where needed.

INITIAL TEMPLATES AND WORKFLOWS

- Inquiry acknowledgment
- Assignment and follow-up tasks
- Appointment confirmations and reminders
- Post-visit follow-up
- Missed appointments
- Longer-term nurture

ENROLLMENT AND EXIT RULES

Each workflow will have defined enrollment, suppression, and exit rules. Follow-up will pause or change when a prospect replies, books, progresses, opts out, or is taken over by a team member, as appropriate to the workflow.

SMS

SMS can be assessed during discovery. Activation depends on an approved provider, appropriate consent, and separate subscription and usage costs.

07 AI ENGAGEMENT AND TEAM SUPPORT

Two controlled AI pilots, with people in control.

The implementation includes one initial website customer-agent pilot and one initial AI-assisted nurture pilot for an agreed audience.

Website customer-agent pilot

Uses approved Peterson content to answer common questions, guide visitors toward an inquiry or appointment, and escalate questions requiring a person. It will not invent pricing, availability, incentives, or contract terms.

AI-assisted nurture pilot

Uses available prospect interests and appointment context to make follow-up more relevant, with approved messaging, human review during testing, and clear exit rules.

PILOT ACCEPTANCE

- Agreed scenario testing.
- Suppression checks.
- Usage-monitoring guidance.
- Appropriate escalation.
- A named Peterson owner.

> Activation depends on HubSpot licensing, account eligibility, and approved content. If a capability is unavailable, a replacement deliverable will be agreed before proceeding. AI credits and software usage are separate.

08 INTEGRATION DISCOVERY AND HANDOFFS

Reduce duplicate entry with clear handoffs.

> Integration discovery and planning are included. Custom integration development is not included in the $8,000 fee.

For Peterson's confirmed contract management and property management systems, discovery will identify:

- Required fields
- Supported interfaces
- Data direction
- Handoff milestones
- Matching identifiers
- The authoritative source for each milestone

DELIVERABLE

A feasibility assessment, field mapping, and agreed handoff plan. Any recommended development will receive a separate scope and price. A documented interim handoff may support the core launch if Peterson approves it.

The goal is to reduce duplicate entry and reflect relevant purchaser, application, contract, or lease milestones in HubSpot where supported. No specific connector or two-way synchronization is assumed.

09 REPORTING AND ENGAGEMENT PRIORITIES

Clear numbers from inquiry to purchase or lease.

Core HubSpot reporting will provide visibility into inquiries, active opportunities, scheduled and completed appointments, confirmed sales or leases, sources, project performance, and follow-up coverage.

Daily traffic reporting will use agreed definitions for new inquiries, unique prospects, walk-ins, appointments, and repeat visits. Reporting will distinguish automated acknowledgments from meaningful team responses and scheduled appointments from completed visits.

SAVED VIEWS WILL HIGHLIGHT

- Unassigned inquiries
- Stalled opportunities
- Overdue follow-up
- Prospects showing renewed engagement

Digital activity will help prioritize review without being treated as proof of purchase readiness.

> Advanced historical reporting, BigQuery, Looker Studio, custom Excel generation, and multi-system reporting are optional services scoped separately.

10 TRAINING AND ADOPTION

Peterson Success Center

Launch training and ongoing reference, in one place.

The initial Peterson Success Center is included as a branded resource for launch training and ongoing reference. It will contain the agreed process guides, recordings, communication examples, daily checklists, and answers to common questions.

CONTENT

- Getting started
- Managing contacts
- Sales and leasing journeys
- Tasks and follow-up
- Marketing preferences
- AI pilot guidance
- Dashboards

Role-based training

Live role-based training will use Peterson's launch configuration. Designated users will receive a walkthrough of the Success Center and the daily processes relevant to their roles.

Hosting and access

Hosting and access arrangements will be confirmed during discovery; third-party charges are separate.

OUTSIDE THE INITIAL SCOPE

- Custom authentication
- Quizzes
- Live CRM connections
- Learning progress tracking
- Certifications

11 DELIVERY PHASES AND LAUNCH

Four phases, each with a clear completion threshold.

The delivery schedule will be agreed at kickoff around Peterson's launch priorities, data readiness, and team availability.

Discovery and kickoff	CRM foundation and data	Workflow and reporting readiness	Training and launch
Launch scope, responsibilities, access requirements, and implementation plan agreed.	Core CRM structure and pipelines demonstrated; sample migration, mappings, and exception rules approved.	Agreed forms, routing, scheduling, templates, workflows, and dashboards pass documented scenario tests; AI pilots reviewed.	Approved migration reconciled, training delivered, Success Center available, launch checklist accepted, and core rollout completed.

> Testing will include contact matching, routing, opportunity associations, permissions, reminders, workflow exits, reporting reconciliation, and approved handoffs. Launch stabilization and its duration will be agreed in the kickoff plan. Separately commissioned integrations will have their own delivery schedule.

12 INVESTMENT

Investment and payment thresholds

Total implementation fee

$8,000 CAD

Plus applicable taxes.

The fee includes discovery, the agreed CRM configuration and migration, lead capture, initial follow-up automation, the two defined AI pilots, core reporting, integration discovery, role-based training, the initial Peterson Success Center, testing, and launch support.

Payment schedule

Payment	Threshold for invoicing	Amount
1 of 4	Proposal acceptance and project kickoff, with the initial scope and responsibilities agreed.	$2,000 CAD
2 of 4	Peterson approval of the core CRM structure, pipelines, data mappings, and sample migration.	$2,000 CAD
3 of 4	Peterson approval of workflow and reporting readiness following documented testing of the agreed forms, routing, scheduling, follow-up, and dashboards, plus review of the AI pilots.	$2,000 CAD
4 of 4	Completion of the approved core launch, reconciled migration, role-based training, and delivery of the initial Peterson Success Center.	$2,000 CAD
Total	**Four equal installments of 25%**	**$8,000 CAD**

Milestones are based on completion of the agreed deliverables, rather than elapsed calendar time. Written milestone approval will confirm that the applicable threshold has been reached. Invoice payment terms will be confirmed in the final agreement.

HubSpot software and third-party costs

Ongoing consulting

Ongoing consulting after the agreed launch support period is optional, with scope,

HubSpot software is purchased separately under Peterson's own HubSpot quote. Third-party subscriptions, SMS usage, AI credits, vendor interface fees, middleware, and hosting are additional and will be identified for approval before commitment.

capacity, and fees agreed separately. No monthly retainer is included in this proposal.

13 RESPONSIBILITIES & ACCEPTANCE

Who does what, and when it is complete.

Betcher Consulting Group

- Solution design
- Configuration
- Data mapping and migration coordination
- Templates, workflows, and reporting
- Integration discovery
- Training and launch support

Peterson

- Timely access and source data
- Approved content
- Business owners and process decisions
- Participation in testing
- Approval of the blueprint, migration, milestone deliverables, and launch

Vendor and website partners

- Required access
- Technical documentation
- Agreed changes within their systems

Deliverables and acceptance

Deliverable	Acceptance method
Approved implementation blueprint	Written approval by Peterson
Core CRM structure and pipelines	Demonstrated and approved by Peterson
Data migration	Sample migration approved; full migration reconciled
Forms, routing, scheduling, templates, workflows, and dashboards	Documented scenario tests
Integration discovery	Feasibility assessment, field mapping, and agreed handoff plan
Initial AI pilots	Agreed scenario testing, appropriate escalation, suppression checks, a named Peterson owner, and usage-monitoring guidance
Peterson Success Center	Initial Success Center available to designated users.
Launch	Training delivered and launch checklist accepted

> Completion will be assessed against working business scenarios and the approved scope. Separately scoped integrations are not a requirement for core acceptance when an agreed interim handoff supports launch. Material additions, extra project rollouts, extensive historical-data reconstruction, and custom development require an approved change in scope.

14 · NEXT STEPS

Where we go from here.

1. Review the proposed scope and four payment thresholds.
2. Confirm the initial projects, teams, datasets, and deliverable allowances.
3. Finalize HubSpot licensing and identify the relevant technical partners.
4. Agree invoice terms, launch support duration, and the implementation schedule.
5. Approve the engagement and schedule kickoff.

Prepared for Peterson · Prepared by Dave Betcher | Betcher Consulting Group · dave@davebetcher.com