SOLUTION BRIEF

Cronulla Pools
HubSpot Support

Prepared for Matt Lainson, Kate Lainson, and Scott Galley

Prepared by Matt Porter, Neighbourhood Co. | April 2026

5 phases
Phased delivery, your pace

< 5 min
PDF to live proposal

0 manual
Call notes written by hand

THE SITUATION

The craft is there.
The system behind it is not keeping up.

Cronulla Pools builds around 50 to 70 leads a month into a $770,000 monthly revenue target. The craft and the sales training are there. What is not there is the system running behind Scott. He generates every quote in BuilderTrend and sends it as a PDF attachment. The proposals, in Kate's words, are something the business has been cringing about for ages. They look nothing like the brand you have built. And they land in junk.

Behind the quote, 54 deals sit in follow-up with no way to separate the hot ones from the ones that will never close. Scott runs off his tasks religiously, but as the volume grows, things drop. When a client is not sold on price, or their partner needs convincing, or council is holding them up, Scott has to remember to follow up with the right content at the right time. He does not always get to it.

Every call Scott makes on his PLAUD has information that should live in HubSpot. Right now it lives in his head, or in a note written by a VA hours later, or not written at all. Kate wants reporting she can trust, but the data going in is inconsistent. Leads coming through already know they want a pool. The drop-off is in education: what a concrete pool actually costs, what competitors are hiding in their cheaper quotes, and whether this is the right time. That work is falling on Scott to do manually, one call at a time.

This brief lays out five phases of work. Each phase delivers a complete outcome. You approve each phase before it starts. You can stop after any phase if you have what you need. Every phase builds on the one before it, but each one works on its own.

01 Pipeline Restructure and Deal Hygiene

Everything else depends on clean data and a pipeline that works. This goes first because without it, automation will amplify the mess rather than fix it.

~1 WEEK

Single Pipeline with 7 Stages

Multiple pipelines are creating duplication and breaking reporting. A single pipeline with clear stages, each with specific entry criteria, replaces the guesswork.

NEW ENQUIRY

~15

Raw inbound

Auto-created by form/ad

QUALIFIED

~8

Budget + timeline confirmed

Req: budget, pool type, suburb

SITE VISIT

~5

Booked or completed

Req: date, site notes

TO QUOTE

~8

Quote to be prepared

Req: site notes complete

QUOTE SENT

~10

Proposal delivered

Req: amount, quote date

CONTRACT

~3

In negotiation

Req: contract value, start

BACKBURNER

~20

Auto-resurface later

Req: revisit date

WON / LOST

--

Terminal

Lost: reason required

These stages are a starting point based on what we heard in the workshop. One of the first things we do in Phase 1 is sit down with Scott and Kate to confirm the exact stages, entry criteria, and naming that fits how Cronulla Pools actually works. Nothing gets built until you have signed off on the final structure.

- Merge existing pipelines into one. Lead source, referral type, and pool type become deal properties for filtering and reporting instead of separate pipelines.
- Each stage has required fields that block progression until filled. Data quality improves from the first day.
- Progressive capture: name and suburb at entry, budget at qualified, full specs at site visit, amount at quote. No upfront data dump.

Output: Single rebuilt pipeline configured in HubSpot with stage-dependent required fields.

Backburner Stage with Automated Resurfacing

Twenty of those 54 deals in follow-up are not dead. They are not ready. Right now they sit in the same list as the hot ones, creating noise. Backburner separates them and brings them back when the time is right.

- Required "Revisit Date" field (future-only, minimum 30 days out) enforced when a deal moves to Backburner.
- Workflow delays until the revisit date, then creates a task for Scott: "Time to re-engage [contact name]."
- Parallel nurture sequence fires in the background while the deal is parked (project inspiration, seasonal timing, financing).
- If the contact replies or books during the nurture, the deal auto-moves back to the active pipeline.

Output: Backburner stage, revisit date workflow, nurture enrollment, and auto-resurface logic.

Visual Prioritisation and Stale Deal Alerts

Scott should not need to click into each deal to know what needs attention. The board should tell him at a glance.

- Inactive card threshold set at 14 days. Deals with no logged activity grey out automatically on the pipeline board.
- Workflow auto-sets deal priority to High (red) when last activity exceeds 14 days. Card turns red.
- Deal card face customised to show: deal amount, last activity date, close date, priority flag, and objection type.
- Quote-review gate: no deal can move to "Quote Sent" without a meeting booked. Prevents sending proposals without a review call.

Output: Inactive card highlighting, priority auto-set workflow, customised deal cards, and quote-review gate.

WHAT WE NEED FROM YOU FOR PHASE 1

→ 30 minutes with Scott to walk through how he uses the current pipeline and what his task workflow looks like

→ Kate's decision on which existing pipelines to merge (we will recommend, you approve)

→ Access to HubSpot as a Super Admin for pipeline and property configuration

→ Agreement on the naming convention for deals (address-based recommended, e.g. "123 Smith St Cronulla")

Phase 1 Approval

Pipeline restructure, backburner, deal hygiene, and visual prioritisation.

View full investment

02 PLAUD Call Notes to HubSpot

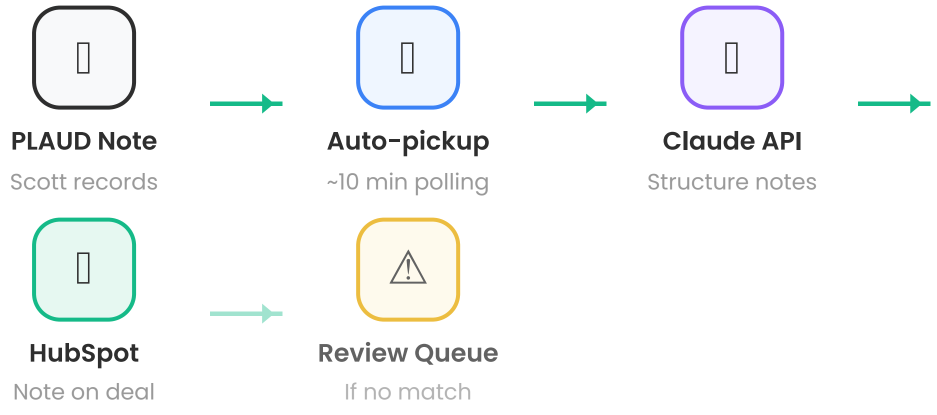
Scott already records every call. The transcript already exists. We close the gap between the PLAUD in Scott's pocket and the deal in HubSpot. No middleware subscriptions. No manual steps. Notes land in HubSpot within 10–15 minutes of a call ending.

~1 WEEK

REQUIRES PHASE 1 (NAMING CONVENTION)

Automatic Call Notes to HubSpot

Scott already records every call on his PLAUD. As soon as a transcript is ready, a process running on a dedicated server picks it up automatically, structures it with AI, and pushes a note straight onto the right deal in HubSpot. No Zapier. No manual steps. No monthly middleware. Notes are typically live within 10–15 minutes of the call ending.



Scott finishes a call on his PLAUD Note as he already does. PLAUD transcribes automatically with speaker labels. No change to how Scott works today. The best habit Scott can build: say the deal name or the contact's name at the start of the recording: "this is the call with Jane Smith, 14 Surf Road Cronulla." The system uses that to find the right deal automatically.

- No Zapier, no Make, no subscription middleware. Notes are hosted, processed, and pushed entirely on infrastructure we manage for you, covered under the $85/month server fee.
- Best practice: Scott says the deal name or contact name at the start of each recording. The system uses this to match automatically. The naming convention guide (below) makes this a 5-second habit.
- Claude extracts from the full transcript: key points, objections, action items, next steps, budget, pool specs, and a hot/warm/cold temperature score. PLAUD's own AI summary feeds in as a second source.
- Rolling deal summary: each call adds to a cumulative summary on the deal. After 4 calls, Scott reads one note to know exactly where things stand, not 4 separate entries to scroll through.

- AI-suggested deal properties: pool type, budget range, objection type, and timeline auto-populated from each call. Scott confirms or corrects with one glance.
- Unmatched recordings land in a review queue, not an inbox. Scott sees them flagged, assigns the deal, done. Nothing disappears silently.
- Auto-task creation after every matched call. Follow-up task pre-filled with the next step from the AI summary.
- Weekly recap every Monday: calls processed, matched vs flagged, temperature changes across the pipeline. Phase 5 upgrades this to a full AI-written briefing.

Output: Automated call note pipeline from PLAUD to HubSpot, Claude API structuring, smart deal matching, review queue for unmatched recordings, rolling deal summaries, AI-suggested properties, auto-tasks, and weekly recap. Fully documented and tested.

The AI processing that powers this phase runs at ~$1.50 per call transcript: pay-per-use, no subscription, no minimums. At your current call volume the typical monthly cost is around $120. Full breakdown in the *Investment section**.*

One-Sentence Habit and Team Training

The matching is smart, but it works best when Scott gives it something to work with. One sentence at the start of each recording: the deal name, address, or the contact's name. The system handles the rest automatically. We make this a 5-second habit, not a process overhead.

- Short guide on how the matching works and what Scott can say to help it. Not a naming convention, just a habit. "This is the call with Jane Smith, Surf Road Cronulla." That's enough.
- HubSpot deal naming standard agreed with Kate (address-based is recommended and already discussed): consistent deal names give the system a clean reference to match against.
- 30-minute walkthrough with Scott and Claire: how notes land, how to check the review queue, and how to manually assign the rare unmatched recording.
- Test run with 5 live recordings end to end before handover. Every step verified before Phase 2 is signed off.

Output: Matching habit guide, HubSpot naming standard, team walkthrough, and verified test run.

WHAT WE NEED FROM YOU FOR PHASE 2

→ Scott's PLAUD account open in a browser for a one-time setup session (takes about 5 minutes)

→ 5 sample recordings from real prospect calls for testing and prompt calibration

→ HubSpot Private App token with deals, contacts, and engagements scope

→ Agreement on the HubSpot deal naming standard (we will recommend, Kate confirms)

Phase 2 Approval

PLAUD to HubSpot automation, Claude API integration, naming convention, and team training.

View full investment

03

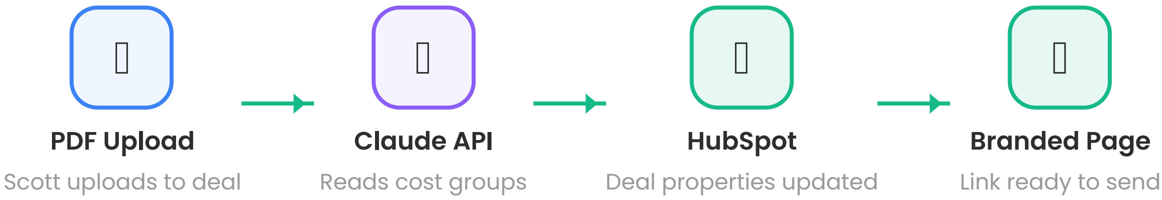
Branded Quote Front-End

BuilderTrend stays exactly as it is. Scott still quotes there, always will. This puts a branded front-end on top of the PDF he already sends, so the client's first experience of the quote looks and feels like Cronulla Pools, not a BuilderTrend export.

~2-3 WEEKS   REQUIRES PHASE 1 (DEAL PROPERTIES)

PDF Upload Triggers the Front-End Automatically

Scott uploads the BuilderTrend PDF to the deal in HubSpot: the same PDF he already sends. That upload is the only trigger. Everything after it is automatic: the quote is read, the cost groups are pulled out, and a branded page is generated ready to send. BuilderTrend stays as the source of truth. Nothing about how Scott quotes changes.



Scott exports the BuilderTrend quote as a PDF, exactly as he does now. He uploads it to the deal record in HubSpot. That is the only step that changes. The rest runs automatically.

- The trigger is the PDF upload to HubSpot. No new tools for Scott to learn. No change to how BuilderTrend is used.
- Claude reads BuilderTrend's specific PDF layout and extracts 5-8 cost groups with subtotals. Calibrated and tested against 10+ real Cronulla Pools quotes before go-live.
- BuilderTrend remains the source of truth for detailed specs. The front-end shows cost group summaries only, clean and readable for the client.
- Scott can review extracted values on the deal card and correct anything before the page is published. Two deliberate steps: upload, then send the link.

Output: PDF upload trigger, Claude API extraction calibrated to BuilderTrend's format, HubSpot deal properties, and branded front-end page generation.

AI extraction runs at ~$3.00 per proposal generated: pay-per-use, no subscription. At 20 proposals a month that is $60. Full breakdown in the Investment section.

Branded Quote Page at proposals.cronullapools.com.au

The numbers are the same as what BuilderTrend produces. What changes is how the client receives them. Instead of a PDF in an email that lands in junk, they get a link to a page at your own domain. Your brand,, your completed projects, your video, and a clear next step.

- Custom-built proposal page designed to match the Cronulla Pools website exactly: same colours, fonts, imagery style, and layout patterns. It should feel like part of your site, not a separate tool.
- Privacy-safe URLs: each proposal lives at `proposals.cronullapools.com.au/p/[hash]`. No address in the URL. Your client's neighbours do not need to know they are spending $140k on a pool.
- Dynamic content pulled from HubSpot: client name, pool specifications, cost group breakdown with inclusions, optional extras, and total. Collapsible terms and conditions at the bottom.
- Completed project showcase: 3-5 similar pools shown on every proposal, matched by pool type first, then suburb proximity. Photos come from a project library Kate manages through a dedicated upload page (see below).
- Hero image: if a 3D render exists for the project, it becomes the hero. If not (most proposals go out before the design phase), a completed project photo fills the space.
- Embedded video: Kate and Matt's brand video plays inline on every proposal, building trust before the numbers.
- Two clear CTAs on every page: "Accept this quote" (eSign) and "Book a call with Scott" (HubSpot meeting link).
- Engagement tracking: proposal opens, section views, and time on pricing logged as activity on the HubSpot deal timeline.
- 30-day expiry on every proposal, matching current BuilderTrend terms.
- Mobile responsive. Clients will open these on their phone at the kitchen table. It needs to work.

Output: Branded quote page at proposals.cronullapools.com.au, designed to match your brand, with eSign, HubSpot meeting link, video, project showcase, engagement tracking, and 30-day expiry.

HubSpot CRM Card: Quote Page Control

Everything Scott needs to manage the quote page lives on the deal record he is already looking at. He never needs to go anywhere else.

- Quote page status visible at a glance: Not Started, Processing, Ready to Send, Viewed, Accepted.
- Upload triggers automatic extraction. Scott sees the cost groups populate on his deal card and can correct anything before publishing.
- "Send Link" button: copies the branded page URL. Scott pastes it into his email and sends. One action.
- Last viewed timestamp and open count directly on the deal card. Scott knows if the client has looked at it without having to chase.

Output: Custom HubSpot CRM card showing quote page status, extracted cost groups, send link, and client engagement data.

Project Photo Library and Upload Page

The proposal page needs completed project photos. Kate needs a simple way to upload and tag them without asking us every time. A dedicated ingest page gives her ownership of the photo library.

- Password-protected upload page hosted on the same server. Kate logs in, uploads photos, tags the project.
- Required fields per project: address, suburb, pool type (concrete, plunge, swim spa, lap pool), completion date, and photos (multi-upload).
- Optional fields: pool size, features (glass fencing, heat pump, water feature, lighting), client name for testimonial linking, before/after flag on photos.
- Initial bulk ingest: Kate uploads 20-30 existing projects in one session. After that, she adds new projects as they complete.
- Proposal pages auto-match projects by pool type first, then suburb proximity. Scott can override the selection from the CRM card if needed.

Output: Photo upload and tagging page, project database, and auto-matching logic for proposals.

Post-Proposal Automation

The proposal page does not just sit there. It triggers actions in HubSpot based on what the client does.

- Client opens the proposal: activity logged on the HubSpot deal timeline with timestamp.
- Client spends 60+ seconds on pricing: "high intent" activity logged with time spent.
- Client clicks "Accept": deal stage moves automatically. E-signature captured. Scott and Kate notified. (The exact next step after acceptance, whether that is a formal contract, deposit invoice, or something else, will be confirmed at kick-off.)
- Client clicks "Book a call": HubSpot meeting link opens, booking associated to the deal automatically.
- No activity for 3 days after first open: follow-up task created for Scott.

Output: HubSpot deal timeline activity from proposal page events, auto-stage moves, and follow-up task logic.

WHAT WE NEED FROM YOU FOR PHASE 3

→ 10+ sample BuilderTrend PDF quotes for Claude API extraction training and testing

→ Brand assets: logo files (SVG), colour palette, approved fonts, and brand guidelines (or we match from your website and Kate reviews)

→ Kate and Matt's brand video file or YouTube/Vimeo link for embedding

→ 20-30 completed project photos for the initial bulk upload to the project library (Kate tags them via the upload page)

→ DNS access for proposals.cronullapools.com.au (we configure the subdomain)

→ Scott's HubSpot meeting link confirmed and active (for the booking CTA on the quote page)

→ Confirmation of what happens after a client accepts a proposal (contract, deposit, or other next step)

Phase 3 Approval

Custom AI proposal builder, CRM card, PDF extraction, branded proposal pages, project photo library, engagement tracking, and post-proposal automation.

[View full investment]

04

Nurture Sequences and Objection Handling

Automated email workflows that run in the background at every stage of the deal. Pre-quote education. Post-quote objection handling. Brochure follow-up. All of it stops automatically when the deal moves forward. Every email is brand-first: designed to look and feel like Cronulla Pools, sent from the deal owner's email address automatically.

~2 WEEKS

REQUIRES PHASE 1 (PIPELINE STAGES)

Pre-Quote Sequence (5 emails, 10 days)

Between the initial enquiry and Scott's discovery call, nothing is running. The lead sits in silence. This sequence educates them on costs, process, and what to expect so Scott's first conversation is with someone who already understands the basics.

IMMEDIATE

What happens next with your Cronulla Pools enquiry

Welcome, expectations, and what the process looks like. Sent from Scott.

DAY 2

How long does a custom pool actually take?

Timeline reality check. Council DA alone is 6-12 weeks in NSW. Excavation, curing, tiling. The real numbers.

DAY 4

Why two pools quoted at $120k are not the same pool

Inclusions vs exclusions. What competitors leave out. This email does the heaviest lifting on price shock before Scott has the conversation.

DAY 7

[Suburb] family's pool: 14 weeks from approval to first swim

Real project story with professional photography. Local to the prospect's suburb where possible.

DAY 10

Scott has Thursday available. Want 20 minutes?

Soft CTA to book the discovery call. Low pressure.

- Marketing workflow, not manual sends. Fires automatically when a contact enters the pipeline. No action required from Scott.
- Sent from the deal owner's email address automatically. If Scott owns the deal, it comes from Scott. If the team grows and someone else owns a deal, it comes from them. Reads like a personal email, not a marketing blast.
- Stops automatically when a meeting is booked or the deal moves past "New Enquiry".
- Summer branch: January spike leads (lower quality) get a condensed 3-email version. Higher-intent leads get all 5.

Output: 5-email pre-quote workflow, live in HubSpot, enrolling contacts automatically.

Post-Quote Objection-Based Nurture (5 paths)

Once the quote goes out, the real objections start. Price against a cheaper competitor. A partner who was not on the call. Council timelines. Builder coordination. Each one needs different content. Right now it depends on Scott remembering to send the right thing.

Price / Value | Timeline / Council | Multi-Decision-Maker | Rock / Site Access | External Builder

3 emails over 14 days. Fires when Scott tags the deal with "Price" objection.

DAY 3

What's actually included in your Cronulla Pools proposal

Line-by-line inclusions breakdown. What other builders leave out. Side-by-side comparison framework.

DAY 8

The cost of cutting corners on a concrete pool

Kate and Matt video on build quality. Real examples of what happens when the cheapest quote wins.

DAY 14

Making it work: payment options for your pool build

Finance and staged payment options. Reframes the conversation from "expensive" to "how".

- New "Objection Type" multi-select property on the deal card (Price, Timeline/Council, Multi-Decision-Maker, Rock/Site Access, External Builder). Scott tags one or more. The matching workflows fire automatically.
- The existing free-text "Objections" field stays for notes. The new structured property drives the automation.
- All workflows stop when the deal stage changes to Won, Lost, Contract, or Backburner.
- Default 3-email fallback for deals with no objection tagged (price transparency + social proof + follow-up CTA).

- Before any content is generated, we run a 1-hour workshop with the Cronulla Pools team: Scott, Kate, and anyone else who talks to clients. The workshop covers every sequence and objection path: what the email needs to say, what language resonates, what Scott already knows works on calls. We use that as the brief to generate all copy. Nothing is written without it.
- Once copy is drafted from the workshop brief, Kate and Scott review and approve before anything goes live. Typically 1-2 rounds.

Output: 1-hour content workshop, 5 objection-path marketing workflows, default fallback workflow, objection_type multi-select property, and all emails drafted, reviewed, and approved.

Brochure Download Nurture (3 sequences)

When a lead downloads content or engages with education material, going quiet is a wasted opportunity. Each content interaction triggers its own 3-email nurture, warming the contact toward a conversation with Scott.

- Email 1 (immediate): delivers the PDF, sets expectations about what they just downloaded.
- Email 2 (day 4): related project case study matched to the brochure topic.
- Email 3 (day 10): soft CTA to book a consultation with Scott.
- Tags contacts by which brochure they downloaded for segmentation and lead scoring.

Output: 3 brochure-triggered nurture sequences (9 emails total), live in HubSpot.

Facebook Audience Sync

Email nurture works better when it is reinforced by what the prospect sees in their Facebook feed. We set up the HubSpot to Facebook sync so the right contacts are in the right audiences automatically. Kate provides the ad creative and manages the campaigns in Ads Manager. We wire up the data so her audiences are always current without manual exports.

- Pre-quote active leads: audience ready for Kate to run completed project photography and "book a discovery call" ads.
- Proposal sent 7+ days: audience ready for testimonial video ads.
- Lost on price: audience ready for finance option ads at 60-90 days.
- Suppression audience: won customers excluded automatically so existing clients are never served acquisition ads.
- Audiences refresh automatically as deal stages change in HubSpot. Kate's ads are always targeting the right people without any manual list management.

Output: 4 Facebook Custom Audiences configured and synced from HubSpot with automatic refresh. Ad creative and campaign setup provided by Kate.

WHAT WE NEED FROM YOU FOR PHASE 4

→ 1-hour workshop with the team: Scott, Kate, and anyone else who handles client conversations. We run through every sequence and objection path together. This is the brief we write the content from. Nothing gets drafted without it.

→ 2-3 completed project case studies with photography, suburb, pool type, and any client quotes (for use in nurture emails)

→ Kate and Matt's brand video files for embedding in objection emails

→ Facebook Business Manager admin access for audience sync configuration

→ Kate to provide ad creative and manage campaigns in Ads Manager once audiences are live

Phase 4 Approval

Pre-quote sequence, 5 objection paths, 3 brochure nurtures, and Facebook audience sync.

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05 Newsletter, Lead Scoring, and Facebook Lead Ads

A monthly newsletter, progressive profiling, lead scoring, and Facebook Lead Ads. The newsletter keeps Cronulla Pools in front of every lead who is not ready to buy today. Lead scoring tells Scott which ones are warming up.

~1 WEEK · REQUIRES PHASE 1 (PIPELINE) · CAN RUN ALONGSIDE PHASE 4

Progressive Profiling and Lead Scoring

Not every lead is equal. Some are browsing, some are ready to build. Without scoring, Scott treats them all the same. Progressive profiling captures more data over time without asking for everything upfront, and lead scoring surfaces the ones worth calling first.

- Progressive profiling across all HubSpot forms: first interaction captures name, email, suburb. Subsequent interactions add phone, pool type, timeline, and budget range. No form ever asks for the same field twice.
- Lead scoring model configured in HubSpot: points assigned for email engagement (+15 for opening 2+ nurture emails), website behaviour (+25 for visiting the contact/quote page), form submissions (+10 per form), and proposal engagement (+30 for viewing a proposal from Phase 3).
- Score thresholds trigger actions: Hot leads (75+) create a task for Scott. Warm leads (40-74) enter targeted nurture. Cold leads (under 40) stay in the monthly newsletter.
- Scoring model calibrated against existing closed-won deals to validate the weighting before going live.

Output: Progressive profiling configured across forms, lead scoring model with threshold-based workflows, and scoring validation report.

Facebook Lead Ads Integration

Facebook is where pool buyers browse before they enquire. Lead Ads capture interest directly in the feed without sending people to a website. Lower friction, higher conversion, and every lead flows straight into HubSpot.

- Facebook Lead Ads configured using HubSpot's native integration. Leads sync directly to HubSpot, trigger progressive profiling, and enter the appropriate nurture sequence from Phase 4.
- Retargeting audiences: (1) website visitors who did not enquire, (2) leads who enquired but did not progress within 14 days, (3) email match from HubSpot contact export for lookalike targeting.
- Ad creative recommendations: short video from Kate and Matt for cold audiences. Static image with clear CTA for retargeting.

Output: Facebook Lead Ad configurations, retargeting audience setup, and creative recommendations.

Monthly Newsletter: Template, First Issue, and Cadence

Most pool leads take 3-6 months to decide. If Cronulla Pools goes quiet after the first conversation, competitors fill the gap. A monthly newsletter keeps the brand in front of every prospect who is still thinking, without Scott lifting a finger.

- We design and build the first newsletter template in HubSpot, matching Cronulla Pools branding. Reusable by your team every month going forward.
- We write and send the first issue as the reference standard. Content mix: one recent project showcase with photos, one education piece, one seasonal tip or FAQ, and a soft CTA to book a call.
- Monthly send cadence configured in HubSpot. Active leads and enquiries receive it automatically. Past customers who have already purchased are moved to non-marketing contacts so you are not paying to email people who will never buy a second pool.
- Simple content calendar and writing guide handed over so Kate or her team can produce each issue in under an hour using the template.

Output: Branded HubSpot newsletter template, first issue sent, content calendar, writing guide, and contact list segmentation (active leads vs non-marketing).

WHAT WE NEED FROM YOU FOR PHASE 5

→ Facebook Business Manager access (if not already provided in Phase 4)

→ Kate's input on newsletter content direction and approval of the first issue

→ Access to any existing email lists or contact segments for newsletter audience setup

Phase 5 Approval

Monthly newsletter (template + first issue), progressive profiling, lead scoring, and Facebook Lead Ads.

View full investment

06

Executive Reporting and AI Weekly Summary

Kate does not open HubSpot reports because the data was never trustworthy. After five phases of clean data flowing in, the reports become useful. Now we make them come to Kate instead of making her go looking.

~1 WEEK · REQUIRES PHASE 1 (CLEAN DATA)

Executive Dashboard (Kate's View)

Five tiles. Everything Kate needs to know about the business in one screen.

- Pipeline by stage: funnel chart showing deal count and total value at each stage.
- Source performance: bar chart showing which channels produce deals that close. Last 90 days.
- Average days per stage: where deals are getting stuck. If "Site Visit" averages 22 days, that is a bottleneck.
- Deals closing this month: list sorted by amount, with stage and last activity date.
- Win rate rolling 90 days: single number. Won / (Won + Lost). Honest, not inflated.

Output: Executive dashboard in HubSpot with 5 reports.

Activity Accountability Dashboard (Scott + Claire)

Kate should not need to ask Scott what is happening. The dashboard shows her.

- Deals with no activity in 14+ days: sorted by value. These are the ones slipping.
- Deals with no open task assigned: if there is no next action, the deal is drifting.
- Overdue tasks by rep: Scott and Claire, separately. Clear accountability.
- Handoff visibility: deals where ownership changed in the last 7 days. Surfaces Scott-to-Claire handoffs.
- Activity this week by rep: calls, emails, and meetings logged. Simple activity volume check.

Output: Activity dashboard in HubSpot with 5 reports.

Automated Monday Email Report

Kate does not want to open HubSpot. We send HubSpot to Kate.

- HubSpot's native recurring dashboard email, configured to send the Executive Dashboard to Kate every Monday at 8am.
- PDF snapshot of all 5 tiles. Opens in any email client. No login required.
- Zero custom development. This is a native HubSpot feature that most teams do not configure.

Output: Recurring Monday email report configured and tested.

AI Weekly Summary Upgrade via Claude API

Phase 2 gives you a weekly PLAUD activity recap. Now that all the data is flowing (pipeline, proposals, nurture engagement, call notes), we upgrade it. Dashboards show data. The AI summary tells the team what to pay attention to, in plain English, in their inbox every Monday morning.

- Upgrades the Phase 2 PLAUD recap into a full pipeline intelligence briefing. The existing Monday email expands to pull: new leads, pipeline snapshot, stale deals, overdue tasks, source breakdown, proposal engagement, and call activity.
- Claude API turns the raw data into a 200-word executive briefing written in plain English.
- Scott, Kate, and Matt all receive the same email: "8 new leads this week (5 Facebook, 3 referral). Pipeline has $340k in active deals. Three deals have not had activity in 2+ weeks. Two proposals are due to close this month totalling $190k. Scott had 12 calls, 3 deals heated up, 2 are going cold."
- Hosted script, not a third-party subscription. Runs on the same server as the PLAUD integration from Phase 2.

Output: Upgraded weekly script with Claude API narrative, full pipeline data pull, and automated email delivery to Scott, Kate, and Matt.

The AI weekly summary is included: no per-use charge. Full cost breakdown in the Investment section.

WHAT WE NEED FROM YOU FOR PHASE 5

→ Email addresses for Scott, Kate, and Matt for the Monday report

→ Confirmation of which metrics matter most to Kate (we will recommend, she approves)

Phase 5 Approval

Executive dashboard, activity dashboard, Monday email, and optional AI weekly summary.

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THE TRANSFORMATION

Current state vs. after all five phases.

	CURRENT STATE	WITH NBH
Proposals	Ugly BuilderTrend PDF. Lands in junk. Hours to create.	AI-powered branded page at your domain. Under 5 minutes. Engagement tracked.
Call notes	VA transcribes manually. Or not at all.	PLAUD records, Claude structures, HubSpot gets a deal note in seconds.
Pipeline	54 deals in follow-up. No separation. Everything looks urgent.	Backburner clears noise. Stale deals grey out. Priorities visible at a glance.
Objections	Manual. Depends on Scott's memory.	Tag the objection. Five sequences fire the right content automatically.
Lead education	Scott explains costs and timelines on every call.	Nurture sequences, a monthly newsletter, and lead scoring do it before Scott picks up the phone.

	CURRENT STATE	WITH NBH
Reporting	Kate does not trust HubSpot. Never opens it.	Clean data in. AI summary in Kate's inbox every Monday.

ROI PROJECTION

Adjust the numbers to fit your situation.

Based on what you described, the estimates below are conservative. Drag the sliders.

Hours Scott saves on proposals per week

8 hrs

Hours saved on admin and call notes per week

5 hrs

Additional deals closed per month from nurture

1 deal

Average deal value

$120k

Scott's hourly cost ($/hr)

$100/hr

Projected Annual Savings + Revenue

$1.5M

Time Savings Alone (Annual)

$67,600

Payback Period

< 1 month

PROOF OF WORK

We have done this before.

TRADE SERVICES

On Top Roofing

100%	65%	15 hrs
Manual entry eliminated	Faster quote-to-approval	Admin saved per week

Transformed fragmented HubSpot infrastructure into an enterprise-grade system with custom objects, API integrations, and automation that removed every manual data entry step from the quoting process.

> *"They eliminated 100% of manual data entry, and workflows saved me 6-8 hours weekly."*
>
> **Larissa Laughton, Director**

Read the full case study

CONSTRUCTION

Ausmar

23%	7.77%	12%
Increase in new deals	Lift in conversion	Increase in direct traffic

Migrated and rebuilt a home builder's full HubSpot setup, with CRM dashboards, smart content, and persona-driven marketing that drove measurable growth in both leads and closed deals.

> *"The Neighbourhood team guided us through every step with confidence, efficiency, and clarity."*
>
> **Kate D, Marketing Manager, Ausmar**

Read the full case study

INVESTMENT

Six phases. Each one stands on its own.

Each phase delivers a complete outcome. Approve them individually and we run them back to back with no gaps. Pausing between phases means re-entering our build queue, which is typically a three to four month wait.

PHASE	WHAT YOU GET	TIMELINE	INVESTMENT
1. Pipeline Restructure	Single pipeline, backburner, required fields, deal tags, visual prioritisation, quote-review gate	~1 week	$3,715
2. PLAUD Call Notes	Webhook integration, Claude API structuring with temperature scoring, smart deal matching, rolling summaries, AI-suggested deal properties, weekly PLAUD recap, auto-tasks, naming convention, team training	~1 week	$5,575
3. AI Proposal Builder	CRM card with extract/generate flow, PDF extraction via Claude, branded proposal pages matching your website, project photo library and upload page, eSign, booking, engagement tracking, post-proposal automation	~2-3 weeks	$8,675
4. Nurture Workflows	Pre-quote (5 emails), 5 objection paths, 3 brochure nurtures, 33 emails AI-drafted from Scott's voice, Facebook audience sync	~2 weeks	$5,883

PHASE	WHAT YOU GET	TIMELINE	INVESTMENT
5. Newsletter and Lead Scoring	Monthly newsletter (template + first issue), progressive profiling, lead scoring, Facebook Lead Ads	~1 week	$3,100
6. Reporting	Executive dashboard, activity dashboard, Monday email, AI weekly summary to Scott, Kate, and Matt	~1 week	$3,100

All prices exclude GST. If phases are not approved and run back to back, we cannot guarantee the same project lead across all phases.

Included across all phases

- All custom code hosted on a dedicated server managed by NBH ($85/month, billed annually)
- Full documentation for every integration, workflow, and automation
- Team walkthrough and handover session with Scott, Claire, and Kate at the end of each phase, with a clear path to ongoing partnership if needed

AI processing costs

The call automation, proposal builder, and reporting features run on Anthropic's Claude API. You pay per job, not a subscription. No monthly minimums, no lock-in. You only pay when the tools are used.

ACTION	COST PER USE	WHAT IT REPLACES
Call transcript processed	$1.50	15-20 min of manual transcription per call. At 80 calls a month, that is roughly 22 hours of admin work replaced for $120.
Proposal generated	$3.00	45-60 min of Scott's time building a quote PDF and writing an email. At 20 proposals a month, that is roughly 17 hours of selling time recovered for $60.

ACTION	COST PER USE	WHAT IT REPLACES
Weekly AI summary	Included	Kate's Monday pipeline briefing. Plain English summary of new leads, stale deals, overdue tasks, and proposal engagement. No extra cost.

Typical monthly cost at your current volume

80 calls + 20 proposals	Hours returned to the team	Cost per hour saved
~$180/mo	~39 hrs/mo	~$4.60

You will have a billing dashboard showing usage, cost per job, and balance. Credits are purchased in advance and deducted per use. No surprise invoices.

Not included in this scope

Ongoing content creation, paid ads management, or HubSpot licence fees. Landing page design for the main website (Kate is handling those with Adam). Those are conversations for after this foundation is in place and running well.

WHY NEIGHBOURHOOD

Three things worth knowing before you sign.

01

Custom-built, not off-the-shelf.

The proposal tool and the call automation are not third-party subscriptions you are locked into. They are custom tools built for Cronulla Pools, hosted at your domain, running on your data. You own the output. You pay per job, and only when the tools are used.

02

The person in the room is the one who builds it.

The person who ran the workshops with you is the person who delivers the work. Not a separate build team who reads a brief summary. The context from those conversations carries directly into what gets built, because the same person is doing both.

03

Lock in the full build. Keep your spot.

Five phases, delivered back to back over 7-8 weeks. Approving the full scope upfront means your project runs continuously without gaps. If you pause between phases, our capacity fills and the wait to resume could be months. Every phase still delivers a complete, working outcome.

NEXT STEPS

What happens after you sign.

01 **Sign below** Approve the full scope to begin

02 **MSA and invoice** Agreement + first phase invoice

03 **Kick-off call** Matt books in with the team

04 **Work begins** Phase 1 starts within 48 hours

Ready to get started?

Review the scope above, then sign below to approve and lock in your build slot. Invoicing is phased, but the commitment keeps your project running continuously.

NEIGH BOUR HOOD

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