



STATEMENT OF WORK · PROJECT

Statement of Work for Cronulla Pools

For Cronulla Pools

NEIGHBOURHOOD LEAD

Alex Bailey

PM + Builder

PREPARED

13 May 2026

INVESTMENT

\$30,048 ex GST

REFERENCE UNTIL

12 June 2026

STATUS

Expired

YOUR PROJECT AT A GLANCE

The whole engagement, on one card

Full detail follows below. This is the orientation.

PROJECT CODE

CRON-P-001

ENGAGEMENT

Fixed-scope project

DURATION ~11 weeks -- 13 May to 26 July 2026	INVESTMENT \$30,048 ex GST -- paid in full prior to kickoff
PHASES 7 (process map + 6 build workstreams + wrap)	WORKSHOPS 2 -- process-mapping with Scott; content workshop with Scott + Kate
ESTIMATED GO-LIVE Workstream by workstream; full handover week of 20 July 2026	YOUR NBH LEAD Alex Bailey PM + Builder
OPERATES UNDER Master Services Agreement, signed 21 April 2026	

● EXPIRED

so you can circulate this internally

01 Let's get started

Kate,

Thanks for the kickoff this morning -- it was useful to walk the whole thing end to end with you and Scott. This Statement of Work is the project-plan side of what we agreed in the brief: who's doing what, when each phase lands, what we'll need from your team to keep it moving, and how we handle the bits where reality changes the plan.

The headline is unchanged from the brief: six workstreams of work plus a wrap, \$30,048 ex GST, end-state is a sales engine that stops the post-quote ghosting, runs the nurture for you, and gives you the management view you've been flying without. The interesting part of this document is the how -- the week-by-week schedule, the dependencies we'll need from your side, the risks we've already named, and the shared playbook for change.

No signature on this one. The MSA is signed and the work is underway. Use this as the source of truth when you're checking what's coming, what's on hold for your input, or what we agreed in the room.

Yell if anything reads wrong.

-- Alex

02 Project summary

Cronulla Pools is moving from a fragmented, manual sales process -- generic PDF quotes, leads ghosting after pricing, multiple pipelines, no management visibility -- to an automated, branded, data-driven engine. Six workstreams turn the proposal into a conversational lifestyle-led asset, route call notes from PLAUD into HubSpot automatically, build objection-path nurture sequences that drive site visits, and give Kate the executive view she has been missing. The work targets ~39 hours/month of team time recovered, lower Meta cost-per-lead via CRM sync, and a measurable lift in post-quote conversion.

03 The crew

Who you'll be working with, what they're on the hook for, and who the escalation backstop is.

NEIGHBOURHOOD



Alex Bailey

PM + Builder

Day-to-day delivery across design, build, training, and comms.

al@nbh.co



Trav White

AI Solutions -- Development of AI Tool

Builds the AI side of the engagement (PLAUD pipeline, proposal builder, weekly summary). Escalation backup if anything stalls.

tw@nbh.co

CRONULLA POOLS



Kate Lainson

Owner

Decision-maker, brand and content sign-off.



Scott Galley

Sales

Workshop participant, day-to-day pipeline user.



Matt Lainson

Operations

Operations and context.

04 Goals

Post-quote conversion Stop the leads-ghosting-after-quote problem. The kickoff identified this as the single biggest sales bottleneck.

- Metric: % of quoted leads who book a site visit within 21 days
- Target: Baseline measured at pipeline go-live; +50% by end of marketing-workflows workstream

Win-rate lift

- Metric: Quote-to-Won rolling 90-day win rate
- Target: +5 percentage points by end of project

Team time returned

- Metric: Hours/month recovered (proposals + call notes + admin)
- Target: ~39 hours/month

Management visibility

- Metric: Weekly Monday AI summary plus live exec dashboard
- Target: Live from reporting workstream, delivered 8am every Monday, no login required

Paid-media efficiency

- Metric: Meta cost-per-qualified-lead
- Target: Baseline at FB Lead Ads launch; reduction target set with Stephen Wyber

05 Outcomes: before → after

The shape of the change in one table - where things sit today, and where they'll sit with NBH.

The “with NBH” column starts hidden. Tap “Show with NBH” to reveal it. It’s always shown in the downloaded PDF.

TODAY

WITH NBH

Generic transactional PDF proposal -- here is what 800 bars of steel costs

→ Branded conversational page on proposals.cronullapools.com.au with lifestyle framing and dynamic project photos

Manual phone -> email -> text follow-up. Leads ghost

→ Auto-nurture by objection type (price, timeline, multi-decision-maker, rock, external builder)

Multiple fragmented pipelines, Hot stage as a manual workaround, inactive deals invisible

→ Single 7-stage pipeline with auto-prioritisation and backburner 30-day resurfacing. Hot retired

PLAUD recordings reviewed manually, notes inconsistent

→ Webhook polls PLAUD ~10-15 min post-call. Claude extracts key points, objections, tasks. Auto-attached to deal

BuilderTrend PDFs re-keyed into proposals manually (45-60 min per quote)

→ Upload PDF -> Claude extracts line items -> branded proposal page in minutes

No management view. Kate flying blind

→ Live exec dashboard plus Monday 8am AI summary email

No newsletter

→ Monthly branded issue, segmented across leads and past customers

TODAY

WITH NBH

No lead scoring

→ Progressive profiling plus 75/40 thresholds (Hot / Warm / Cold)

Untargeted Facebook ads, no CRM sync

→ Native HubSpot lead ads plus custom audiences, lookalikes, and suppression lists

06 HubSpot subscriptions

Cronulla holds Marketing Hub Professional and Sales Hub Professional, confirmed at kickoff. No subscription changes are needed for this scope. HubSpot licence fees are not included in the project fee -- they are Cronulla's direct HubSpot subscription.

07 Solution expectations

What's included

Process Mapping with Scott (Week 1): 1-hour session to map Scott's end-to-end sales process.

Pipeline Restructure (Week 2): unified pipeline, 7-stage structure, backburner resurfacing, inactive-deal detection, customised deal card, quote-review gate.

Marketing Workflows + Copy (Weeks 3-4): 1-hour content workshop with Kate + Scott, Alex drafts copy across all sequences (~26 emails), pre-quote sequence, 5 objection workflows, fallback workflow, brochure-download nurture, workflows connected and live.

PLAUD Call Notes (Week 5): webhook polling, Claude extraction, smart deal matching, review queue, rolling summaries, AI property fill, auto-tasks, weekly recap, team training.

AI Proposal Builder (Weeks 6-8): PDF upload trigger, line-item extraction, branded proposal pages, custom design, privacy-safe URLs, dynamic content, project showcase, brand video, two CTAs, engagement tracking, 30-day expiry, mobile responsive, HubSpot CRM card, photo library, post-proposal automations.

Newsletter + Lead Scoring + FB Lead Ads (Week 9): progressive profiling, 75/40 scoring, validation, FB Lead Ads, retargeting, Facebook custom audiences, newsletter template + first issue, content calendar, segmentation.

Executive Reporting + AI Weekly Summary (Week 10): Executive Dashboard, Activity Accountability Dashboard, Monday 8am email, AI Weekly Summary.

Across all workstreams: server hosting; integration documentation; team walkthroughs and handover; AI credits pay-per-use; bi-weekly check-ins; 2-week post-project QA window.

What's not included

- Ongoing content creation past the first newsletter issue

- Paid ads management (Stephen Wyber executes; we hand him the audiences and structure)
- HubSpot licence and subscription fees (Cronulla's direct HubSpot bill)
- Landing page design for the main cronullapools.com website
- Refilling Claire's sales support role (deferred per decision log)
- Photography and videography production (Cronulla supplies assets)
- HubSpot SMS reply notifications (raised on the kickoff call as a possible addition; out of scope for this SOW; available as a future change request if needed)

08 Assumptions & dependencies

What this plan rests on. Each item names the assumption and, plainly, what happens if it doesn't hold - so a wrinkle is a conversation, not a surprise.

Workstreams run back-to-back with no gaps greater than one week

IF NOT Re-queue adds 3-4 months to project end. Cost may increase if context has to be rebuilt.

Bi-weekly 30-min check-ins are honoured

IF NOT Decisions stall, sign-offs accumulate, and workstream boundaries slip.

Cronulla holds Marketing Hub Professional and Sales Hub Professional (confirmed at kickoff)

IF NOT Marketing workflows, PLAUD custom properties at scale, lead scoring + FB Lead Ads native, and custom reporting are blocked until upgrade.

PLAUD remains the call-recording tool

IF NOT The PLAUD workstream needs a rewrite to swap to whatever replaces PLAUD.

Client supplies brand and content assets by the deadlines in section 19

IF NOT Proposal-builder launch slips week-for-week with the late asset.

Stephen Wyber participates in the FB Lead Ads + audience handover

IF NOT Audiences get built but sit unused. CPA-reduction goal becomes best-effort, not measured.

Kate is the single brand and content decision-maker

IF NOT Each sign-off needs a broader sweep. Add 2-3 days per creative approval.

Ongoing infrastructure costs (dedicated server hosting and AI / LLM processing credits) are charged outside the project fee and capped by approval limits

IF NOT We present an updated monthly forecast for your approval whenever projected spend would exceed the agreed cap (\$250/month default). No surprise invoices -- you approve the limit before we run past it.

The week-by-week timeline is an estimate, not a fixed contract -- adjustments are recorded against this SOW as the project runs

IF NOT Exact milestones, dates, and deliverable sequencing are confirmed at kickoff and updated in the live SOW page as scope, dependencies, or risk outside our control shift the plan.

09 Deliverables

- Process map (Process Mapping workstream) -- Process-mapping session run with Scott; document shared with Kate.
- Unified 7-stage HubSpot pipeline (Pipeline workstream) -- Pipeline live with entry criteria, required fields, backburner resurfacing, inactive grey-out, customised deal card. Old pipelines archived. Kate signs off.
- Marketing workflows live in HubSpot (Marketing Workflows + Copy) -- Pre-quote + 5 objection paths + fallback + brochure-download nurture all live with Kate-approved copy. Auto-stop at Won/Lost/Contract/Backburner.
- Email copy pack (Marketing Workflows + Copy) -- ~26 emails drafted by Alex, reviewed by Kate, approved before workflow go-live.
- PLAUD -> HubSpot transcript pipeline (PLAUD) -- Live call appears on matching deal within 15 minutes. AI fields visible. Review queue functional. Scott trained.
- Branded AI proposal page (Proposal Builder) -- Proposal renders at proposals.cronullapools.com.au/p/<hash>. Brand match. Mobile responsive. Two CTAs. Engagement tracking. 30-day expiry. Kate signs off on design.
- HubSpot proposal CRM card (Proposal Builder) -- Card on deal shows upload status, extracted values, send-link, view count, post-proposal automations firing.
- Project-photo library + upload tool (Proposal Builder) -- Kate can upload + tag photos. Library feeds proposal matched-project module.
- Progressive profiling forms (Newsletter + Scoring + FB) -- Forms collect name/email/suburb first, then phone/pool type/timeline/budget.
- Lead scoring model (Newsletter + Scoring + FB) -- 75/40 thresholds. Validated against closed-won deals. Hot leads create Scott task.
- FB Lead Ads campaign (Newsletter + Scoring + FB) -- Native HubSpot integration live. Lookalike + retargeting audiences ready.
- Facebook custom audiences (Newsletter + Scoring + FB) -- 4 audiences synced. Stephen confirms receipt.
- Monthly newsletter, template + issue 1 (Newsletter + Scoring + FB) -- Template approved. First issue written, segmented, sent.

- Executive Dashboard, Kate's view (Reporting) -- 5 tiles live.
- Activity Accountability Dashboard (Reporting) -- Live for Scott + seat-replacement.
- Monday 8am AI Summary email (Reporting) -- ~200-word briefing delivered every Monday 8am.
- Full documentation + handover (Wrap) -- All integrations documented. Team walkthrough delivered. 2-week QA window opens.

10 Definition of done

WHEN THIS PROJECT IS "DONE"

The project is done when all 17 deliverables meet their acceptance criteria, Kate has signed off each workstream, the final walkthrough has been delivered, all integrations are documented, the 2-week QA window has opened, and the Monday AI summary has delivered successfully for two consecutive weeks.

- ✓ All 17 deliverables meet their acceptance criteria
- ✓ Kate has signed off each workstream per its approval gate
- ✓ Final walkthrough delivered to Kate and Scott
- ✓ All integrations documented (handover doc)
- ✓ 2-week QA window opens (27 Jul to 9 Aug)
- ✓ Monday AI summary delivered successfully for 2 consecutive weeks

11 Acceptance & sign-off process

How each deliverable gets from "we think it's done" to "agreed and signed off" - and what happens when something needs to change after that.

1

Workstream complete

Alex flags the workstream complete via email with deliverables and acceptance criteria checked off.

2

Kate reviews

Usually within 3 business days.

3

Approval given in writing

Email confirmation.

4

Next workstream opens

Decision logged on the live SOW page.

12 How changes are handled

Scope is what's set out in this Statement of Work. Anything beyond it follows the same steps - every time. No surprise work, no surprise invoices.

1

Raise in writing

Either side, via email plus a decision-log entry. Describe what and why.

2

Alex estimates impact

Hours, cost, schedule delta. Reply within 2 business days.

3

Kate decides

Approve, defer, reject. In writing.

4

If approved

Decision logged, schedule updated, change billed separately under the MSA at \$310/hr ex GST.

13 Project timeline

The roadmap strip is the at-a-glance journey; the chart underneath is the detail - click any phase to see its tasks and approval gates. Dates are indicative and confirmed at kickoff.



Tap a milestone to jump to its phase below.

PHASE	W1	W2	W3	W4	W5	W6	W7	W8	W9
> Phase 1 Process Mapping with Scott · W1–W1	PROJECT STARTS HERE · STATUS: EXPIRED - AWAITING SIGN-OFF Pro...								
Runs Week 1 – Week 1 Lock in the foundation before any build work. 1-hour process-mapping session with Scott to map his end-to-end sales process. TASKS & DELIVERABLES - Kickoff (13 May) -- complete - Confirm process-map session slot with Scott -- target Friday 15 May or Monday 16 May - Run the 1-hour process-mapping session - Document Scott's end-to-end sales process APPROVAL GATE ◆ No formal gate this phase.									

> Phase 2

Pipeline Restructure · W2–
W2



Pip...

Runs Week 2 – Week 2

One unified pipeline, seven stages with entry criteria, automated prior stage retired.

TASKS & DELIVERABLES

- Map current pipelines and consolidate
- Define 7-stage structure with entry criteria and required fields
- Backburner 30-day resurfacing logic
- 14-day inactive grey-out and priority flag
- Customise deal card
- Quote-review gate
- Decide deal naming convention (address-based recommended)

APPROVAL GATE

◆ **Sign-off on 7-stage structure + naming convention** — by W2 (Kate)

> Phase 3

Marketing Workflows +
Copy · W3–W4



Marketing Wor...

Runs Week 3 – Week 4

Build the marketing collateral into the workflows. Alex drafts the copy

TASKS & DELIVERABLES

- 1-hour content workshop with Kate and Scott
- Alex drafts copy across all sequences (~26 emails total)
- Pre-quote sequence (5 emails / 10 days)
- Five objection workflows: Price/Value, Timeline/Council, Multi-DM, Rock/S Builder
- Objection-Type multi-select on the deal card
- Fallback 3-email workflow
- Brochure-download nurture (3 sequences, 9 emails)
- Workflows auto-stop at Won/Lost/Contract/Backburner

	• Connect copy into the HubSpot workflows APPROVAL GATE ◆ Approve all email copy before workflows go live — by W4 (Kate)							
› Phase 4 PLAUD Call Notes to HubSpot · W5–W5					 PL...			
	Runs Week 5 – Week 5 Calls turn themselves into deal notes. TASKS & DELIVERABLES • Webhook polling on PLAUD • Claude API extraction of key points, objections, action items, budget, pool temperature score • Smart deal matching via title or contact name • Unmatched-recording review queue • Rolling deal summaries • AI-suggested property auto-fill • Auto-task creation • Weekly PLAUD recap (Mondays) • Team training on the naming habit APPROVAL GATE ◆ Sign-off on auto-extracted fields + review-queue UX — by W5 (Scott +							
› Phase 5 AI Proposal Builder · W6–W8							 AI Proposal Builder	
	Runs Week 6 – Week 8 The proposal becomes the asset that closes the deal. TASKS & DELIVERABLES • BuilderTrend PDF upload trigger to HubSpot • Claude extraction of cost groups and line items							

- Branded page at proposals.cronullapools.com.au/p/<hash>
- Custom design matching the Cronulla site
- Privacy-safe URLs
- Dynamic content (client name, specs, cost breakdown, optional extras)
- Completed-project showcase (3-5 by type then suburb)
- Hero image
- Embedded Kate/Matt brand video
- Two CTAs (Accept e-sign / Book Call)
- Engagement tracking
- 30-day expiry
- Mobile responsive
- HubSpot CRM card
- Project-photo library and upload/tagging page
- Post-proposal automations

APPROVAL GATE

- ◆ **Sign-off on visual design + content sequence** — by W8 (Kate)

> Phase 6

Newsletter + Lead Scoring
+ FB Lead Ads · W9–W9



Ne...

Runs Week 9 – Week 9

Long-game lead nurture, scoring, and lead-gen.

TASKS & DELIVERABLES

- Progressive profiling forms
- Lead scoring model (75 Hot / 40-74 Warm / <40 Cold)
- Score validation against closed-won deals
- FB Lead Ads native HubSpot integration
- Retargeting audiences plus lookalikes plus creative recommendations
- Facebook custom audiences synced + handed to Stephen
- Branded monthly newsletter template
- First issue written and sent
- Content calendar and writing guide
- Audience segmentation (active leads vs past customers)

	APPROVAL GATE ◆ Approve newsletter template + first issue — by W9 (Kate)							
> Phase 7 Executive Reporting + AI Weekly Summary · W10– W10								
	Runs Week 10 – Week 10 Kate gets the management view she has been flying without. TASKS & DELIVERABLES - Executive Dashboard for Kate (5 tiles: funnel, source perf, days/stage, close rolling 90d win rate) - Activity Accountability Dashboard - Monday 8am email PDF snapshot - AI Weekly Summary (Claude) -- 200-word pipeline briefing - Delivery to Scott, Kate, Matt APPROVAL GATE ◆ Confirm priority metrics + recipients — by W10 (Kate)							
> Phase 8 Wrap + QA window · W11– W11								
	Runs Week 11 – Week 11 Final walkthrough, documentation handover, QA window opens. TASKS & DELIVERABLES - Full team walkthrough (Kate + Scott) - Documentation finalised - Two-week QA window opens (27 Jul to 9 Aug) APPROVAL GATE ◆ No formal gate this phase.							



This timeline is an estimate. Exact milestones, dates and deliverable sequencing are confirmed at kickoff and recorded against this Statement of Work.

As the project runs, the dashed “you are here” line moves to the current week and the status badge near the top updates from “Draft · awaiting sign-off” to e.g. “Week 3 of 11 · in delivery”.

14 Decision log / open questions

The calls still to make, who makes them, and by when - so nothing falls through the gaps between workshops. Updated as the project runs.

WHAT WE NEED TO DECIDE	WHO DECIDES	BY WHEN	STATUS
Sales support role (Claire) not refilled immediately; re-decide post-automation at wrap	Kate	2026-07-26	OPEN
Hot deal stage retires once auto-nurture replaces it	Kate / Alex	2026-05-24	OPEN
Pipeline structured by stages, not properties	Kate / Alex	2026-05-13	CLOSED
Bi-weekly 30-min check-in cadence	Kate / Alex	2026-05-13	CLOSED
Address-based deal naming convention (subject to pipeline sign-off)	Kate / Scott	2026-05-24	OPEN

15 Project governance

- Bi-weekly 30-min check-ins (Kate + Alex, optional Scott).
- Email for all async decisions, logged on the live SOW page.
- Workstream approval gates documented per workstream -- Kate signs off before the next workstream opens.
- Two-week post-project QA window: Alex fixes any defects raised by Cronulla's team at no extra cost. Defects = does not match the acceptance criteria. New work = change request.
- Change-control flow: any scope change > 4hr of work goes through the 4-step flow.
- Status visibility: workstream progress and next-up reflected on the live SOW page at solutions.nbh.co/sow/cronulla-pools.

16 How we'll work together

The communication plan - every standing touchpoint, who's on it, what it's for, and what you walk away with. No mystery meetings.

CHANNEL / MEETING	CADENCE	WHO	PURPOSE	WHAT YOU GET
Bi-weekly 30-min check-in	Fortnightly	Kate + Alex (optional Scott)	Status, blockers, decisions	Decision-log entries
Weekly async update	Weekly	Alex to Kate by email	What landed, what is next, what is blocked	Email update
Workstream-complete email	Per workstream	Alex to Kate	Workstream sign-off trigger	Approval reply
End-of-project review	Once, Week 11	Kate + Alex	Wrap-up, QA window opens	Project closure

ASYNCH CHANNELS

EMAIL

All formal communication and sign-offs

HUBSPOT DEAL

Tied to specific deals

PHONE

Kate-side escalation only

TWO-WAY RESPONSE-TIME COMMITMENT

Alex responds within 24 business hours on email and phone. Kate returns workstream sign-offs within 3 business days.

WHAT WE COMMIT TO EACH OTHER

WHAT YOU CAN EXPECT FROM US

- ✓ We do not ghost. Anything blocked is raised by email within 24 hours.
- ✓ Decision log on the live SOW page is the source of truth.
- ✓ Bi-weekly check-in is 30 minutes. Agenda shared 24 hours ahead.

WHAT WE NEED FROM YOU - AND WHAT HAPPENS IF WE DON'T GET IT

- Sign-offs returned within 3 business days *Or the timeline shifts*
- Brand and content assets supplied by the deadlines in section 19
Or the phase slips week-for-week
- Workshop attendance honoured (process-mapping in Week 1, content workshop in Weeks 3-4)
Or workshops are deferred and the workstream pushes

17 Escalation ladder

If something isn't moving, here's the path - and how quickly you'll hear back at each step. Most things never leave step 1.

LEVEL 1 Alex Bailey -- al@nbh.co

< 24 hours

LEVEL 2 Trav White, Head of Growth -- tw@nbh.co

< 48 hours

LEVEL 3 MSA dispute-resolution clause

Per MSA

18 Risk register

What could throw the project off course, how likely and how bad, and what we'll actually do about it. Click a row to see the plan.

RISK		
> Sticker shock kills post-quote conversion (landscaping/rock costs not in pool quote)		HIGH
How we'll manage it: Branded conversational proposal and objection nurture directly target this. Add an indicative-extras line in the proposal.		
> Scott's task volume hides urgent follow-ups		HIGH
How we'll manage it: Pipeline prioritisation plus reporting dashboard surfaces stale deals.		
> Claire's seat empty -- automation has to carry the load until role decided		MEDIUM
How we'll manage it: Pipeline + workflows + reporting designed to run hands-off. Re-decide at wrap.		
> Client-side content / asset delays		HIGH
How we'll manage it: Client-requirement deadlines in section 19. Each delay documented in decision log.		
> Stephen Wyber alignment risk on the Meta side		MEDIUM
How we'll manage it: Loop him in at the FB Lead Ads workstream. Hand him audiences and structure; he owns execution.		

> **HubSpot tier gap (Starter vs Professional)**

HIGH

How we'll manage it: Assumption explicit. Confirm by 18 May.

Owner: Kate

> **AI cost overrun if volumes far exceed estimates**

LOW

How we'll manage it: Monthly cap and alert at \$250 forecast.

Owner: Alex

> **PLAUD title-naming habit not adopted -- review queue floods**

LOW

How we'll manage it: Review-queue UX and Monday recap nudges the habit.

Owner: Scott / Alex

Likelihood / impact pills: LOW MEDIUM HIGH - click any row for the management plan and owner.

19 What we need from you

YOUR PART OF THE DEAL

A few things from your side

This isn't a disclaimer - it's how the engagement stays on track. Each item names who's best placed to provide it and roughly when we'll need it, so nothing waits on a chase.

Scott available for process-mapping session (~1hr)

- Scott

FRI 15 MAY OR MON/TUE 18-19 MAY

Sign-off on 7-stage pipeline + naming convention

- Kate

BY 24 MAY (PIPELINE)

1-hour content workshop attendance

- Kate + Scott

BY 31 MAY (MARKETING WORKFLOWS)

Sign-off on email copy across all sequences

- Kate

BY 7 JUNE (MARKETING WORKFLOWS)

Scott available for PLAUD training session (~30 min)

- Scott

WEEK 5 (~8-14 JUNE)

10+ recent BuilderTrend PDFs

- Scott

BY 15 JUNE (PROPOSAL BUILDER)

Brand assets pack (logo, colours, fonts, type)

- Kate

BY 15 JUNE (PROPOSAL BUILDER)

Kate / Matt brand video

- Kate / Matt

BY 22 JUNE (PROPOSAL BUILDER)

20-30 project photos for the library

- Kate

BY 22 JUNE (PROPOSAL BUILDER)

DNS access for proposals.cronullapools.com.au

- Kate / Matt

BY 15 JUNE (PROPOSAL BUILDER)

Active HubSpot meeting link (Scott's calendar)

- Scott

BY 22 JUNE (PROPOSAL BUILDER)

Post-acceptance workflow confirmation

- Scott

BY 29 JUNE (PROPOSAL BUILDER)

2-3 completed project case studies with photos + quotes

- Kate

BY 22 JUNE (PROPOSAL BUILDER)

Facebook Business Manager access

- Kate

BY 6 JULY (FB LEAD ADS)

Newsletter direction + first-issue approval

- Kate

WEEK 9 (~6-12 JULY)

Stephen Wyber loop-in for FB Lead Ads + audience handover

- Kate

WEEK 9 (~6-12 JULY)

Email + priority-metric confirmation

- Kate

WEEK 10 (~13-19 JULY)

20 Who does what

A quick map of who's accountable for each workstream, who reviews and approves, and who's kept in the loop. Three states, not a full RACI matrix - enough to know where the buck stops without the bureaucracy.

WORKSTREAM	NBH LEAD	NBH DELIVERY TEAM	CLIENT LEAD	CLIENT TEAM
Build + technical implementation	Owns	Owns	KeptInformed	KeptInformed
Pipeline structure + naming	Owns	Owns	Reviews	Reviews
Brand sign-off (proposal, newsletter)	Reviews	Reviews	Owns	KeptInformed
Content sign-off (email copy)	Reviews	Reviews	Owns	Reviews
PLAUD recording habit	KeptInformed	KeptInformed	KeptInformed	Owns
BuilderTrend PDF supply	KeptInformed	KeptInformed	KeptInformed	Owns
Project photo supply	KeptInformed	KeptInformed	Owns	KeptInformed
Brand video supply	KeptInformed	KeptInformed	Owns	Owns
DNS access (proposals subdomain)	Reviews	Reviews	Owns	Owns
Facebook Business Manager access	Reviews	Reviews	Owns	KeptInformed

WORKSTREAM	NBH LEAD	NBH DELIVERY TEAM	CLIENT LEAD	CLIENT TEAM
Meta campaign execution (Stephen)	KeptInformed	KeptInformed	Reviews	KeptInformed
Newsletter ongoing (post-launch)	KeptInformed	KeptInformed	Owns	KeptInformed
Decision authority	KeptInformed	KeptInformed	Owns	KeptInformed
Owns Accountable for getting it done. Reviews Reviews and approves the work. Kept informed Stays in the loop, no action needed.				

21 Terms and conditions

This SOW operates under the [Master Services Agreement signed 21 April 2026](#) (agreement reference msa_fixed). The full legal terms (IP, liability, confidentiality, termination, dispute resolution) live in the MSA and are incorporated here by reference.

Three protection lines

1. Work is done when it meets the acceptance criteria in the deliverable table. Defects raised inside the 2-week QA window are fixed at no additional cost. New work is a change request. 2. Scope is what's in this document. Anything outside the 17 deliverables and the 6 build workstreams is out of scope by default and handled via the change-control flow. 3. Client-side delays push project end dates. The 11-week timeline assumes the client-requirement items in section 19 arrive on time. Late assets and sign-offs slip the project week-for-week.

MSA extension -- Where this SOW conflicts with the MSA, the MSA prevails on legal terms; this SOW prevails on operational scope and timeline. IP transfers on full payment; confidentiality, liability, and termination are governed by the MSA.

MASTER SERVICES AGREEMENT

This Statement of Work operates under the Master Services Agreement signed 21 April 2026. The Master Services Agreement governs intellectual property, confidentiality, liability, termination and governing law.

IP in the deliverables transfers to you on full payment. Confidentiality, liability, and termination are governed by that Master Services Agreement - this Statement of Work covers the delivery; the MSA covers the legal terms.

22 Payment schedule

Project fee -- \$30,048 ex GST (\$33,052.80 inc GST)

Status: PAID -- paid in full prior to kickoff. No further invoices under this SOW.

Recurring add-ons (NOT included in the \$30,048; billed separately):

- Dedicated server hosting -- \$85/month, billed annually
- AI processing credits -- forecast ~\$180/month at expected volume:
- PLAUD transcripts ~\$1.50/call (~\$120/month at 80 calls)
- Proposal generation ~\$3.00/proposal (~\$60/month at 20 proposals)
- Weekly AI summary -- included

Change-request rate -- \$310/hr ex GST (per MSA, applied to any approved change beyond this SOW's scope).

Pricing shown is ex-GST (AUD).

23 How invoicing works

When invoices land, what they're tied to, and what an overdue one means for the work.

Short version: billing runs on its own clock, not the milestone clock.

THE COMMERCIAL TRIGGERS

- Project fee paid in full prior to kickoff -- no further invoices under this SOW.
- Recurring add-ons (server hosting, AI credits) invoiced separately on their own cadence.
- Change requests invoiced on the next cycle after the change is approved in writing.
- Any AI-credit top-up flagged at 80% consumption; client approves before the next batch.

EXPIRED

This Statement of Work has lapsed

The signing window closed on 12 June 2026. Contact your Neighbourhood lead for a re-issued version with a fresh expiry.

CRON-P-001

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