PREPARED FOR MAGNUM PROJECTS

Magnum Projects

An initial HubSpot sales and marketing platform under the Magnum umbrella. A phased rollout for an agreed group of projects, users, and contacts, with team enablement and launch support.

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Date: November 3, 2026 | Draft for review

Implementation: $8,000 CAD plus applicable taxes
HubSpot software quoted separately.

Review HubSpot Quote: https://app-na3.hubspot.com/quote-checkout/quotes/INXNDTPZGX7YOI75

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A phased initial rollout, built for Magnum’s agency model.

This engagement establishes an initial HubSpot sales and marketing platform for Magnum Projects, starting with an agreed group of projects, users, and contacts.

The approach supports Magnum’s agency model: central marketing oversight, project-specific branding and sales ownership, regional communication preferences, and clear reporting for management and developer clients.

Implementation will be phased around developer approvals, existing system agreements, and data availability. The initial rollout will establish and validate the core processes, train the team, and provide a foundation for additional projects as they are ready.

The implementation investment is $8,000 CAD plus applicable taxes, payable in four equal milestone installments. These milestones apply to the agreed initial rollout. Additional project migrations and material expansion will be scoped separately.

One shared CRM

Project-specific purchasing journeys built on one contact database.

Regional communication

Agreed regional preferences, follow-up, and initial SMS workflows.

Initial AI pilots

One website customer-agent pilot and one AI-assisted nurture pilot.

Reporting and adoption

Project and developer dashboards, role-based training, and the Magnum Projects Success Center.

Phased initial rollout

Four milestones for the agreed launch scope, not every future project.

INTENDED OUTCOMES

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

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

Agree the process before configuring the system.

Discovery will include a project and system readiness inventory prepared with Kristen and Senen. This inventory will identify the initial rollout candidates and support agreement on launch scope around developer approvals, existing agreements, and available data.

PROJECT AND SYSTEM READINESS INVENTORY

- Developer and project
- Ownership of existing subscriptions and agreements
- Required developer approvals
- Whether the project can migrate or needs an interim process
- Current CRM and contract management systems
- Available data and export access
- Initial users and contact volumes

DISCOVERY WILL ALSO ADDRESS

- Prospect funnel structure
- Appointment booking
- Website assistance
- Project and developer access and communication permissions
- Regional preferences, communication types, and SMS provider selection
- Lists and qualification
- Daily traffic reporting
- Handoff of purchaser information to contract management
- Campaign attribution and developer reporting definitions

HOW SCOPE IS SET

1. Before kickoff

Use the readiness inventory to agree the initial projects, users, contacts, datasets, and allowances for forms, templates, workflows, SMS, dashboards, training, and developer review calls. Counts and volumes are confirmed, not assumed.

2. During discovery

Discovery validates these assumptions and produces an approved implementation blueprint.

3. As additional projects are ready

Additional project migrations, onboarding, presentations, calls, and material expansion are separately scoped and approved. Launch does not require every developer or future project to migrate.

1. Preliminary preparation

Magnum provides an initial project list, known systems and agreements, proposed users, and developer approval requirements. Betcher Consulting Group and Magnum agree the initial scope boundaries. This preparation is not paid discovery.

2. Pre-purchase validation

Material software suitability questions, particularly SMS and project access, are resolved with HubSpot before software acceptance.

3. Engagement commencement

Implementation acceptance and kickoff trigger the first $2,000 installment.

4. Paid discovery

Betcher Consulting Group validates the inventory, assesses available data, develops mappings and workflows, and prepares the implementation blueprint for approval.

> If paid discovery identifies a material limitation, the options and any impact on scope, timing, or fees will be documented, and written agreement obtained before proceeding with the affected work. Nothing in this proposal changes HubSpot’s cancellation or refund terms.

One contact database, separate opportunities, clear ownership.

The proposed setup is one HubSpot account under the Magnum umbrella, without separate paid HubSpot Brands at launch, subject to final subscription and technical validation. A shared contact database will support separate project-specific purchasing opportunities for the agreed initial rollout.

Component	Proposed approach
Contacts	One record per person, with purchaser preferences, realtor relationships, relationship history, and project-specific communication permissions.
Opportunities	Separate deal records for each project-specific purchasing journey.
Pipelines	A proposed residential sales pipeline, with a Closed Lost outcome and separate long-term nurture disposition.
Developers and projects	Developer relationships and projects linked to contacts, opportunities, and assigned sales teams. Confirm the project structure and custom-object requirements against the selected HubSpot subscription during discovery.
Ownership and access	Central marketing manages across the agreed projects. Sales representatives have access appropriate to project assignments. Validate team permissions, record ownership, and contacts associated with multiple projects against the selected subscription. Complete project-level isolation is not guaranteed before testing.
Access and communication	Project interests and associations are separate from communication permissions. Regional preferences and agreed communication types govern sending; project associations do not grant cross-developer marketing permission.
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
- Regional preferences and agreed communication types

MAGNUM UMBRELLA, PROJECT-SPECIFIC BRANDING

Projects retain their customer-facing identity through approved sender names and email domains, logos, colours, templates, and project-organized marketing assets. Magnum confirmed that its name and address can appear in the marketing email footer. Final sender details and domain authentication will be confirmed during setup; domain allowances and capabilities will be validated against the selected subscription. A separate paid HubSpot Brand is not assumed for each project.

04 DATA PREPARATION AND MIGRATION

Clean, mapped, and reconciled data.

The agreed initial-rollout datasets will be reviewed, mapped, cleaned, and imported into HubSpot as developer approvals and export access permit. Projects that are not ready may remain in their existing system or use an approved interim process.

PREPARATION INCLUDES

- Project associations and ownership
- Statuses and available history
- Legacy identifiers
- Unsubscribes and suppression information

VALIDATION

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

Additional project migrations and historical reconstruction beyond the agreed exports are separately scoped. Initial users, contact volumes, and datasets will be confirmed before kickoff.

> Marketing-contact status, project interests, and project associations will be managed separately from communication permission. Regional preferences, agreed communication types, and global unsubscribes govern sending. Project associations never override preferences or imply permission to market across different developers' projects.

Initial project opportunities, with a clear next step.

Project-specific purchasing opportunities will share contact history while maintaining clear ownership, follow-up, communication permissions, and reporting. Proposed stages will be confirmed during discovery.

PROPOSED RESIDENTIAL SALES PIPELINE

1. New Inquiry
2. Engaged / Needs Identified
3. Appointment Scheduled
4. Appointment Completed
5. Actively Considering
6. Reservation / Offer in Progress
7. Under Contract
8. Closed / Homeowner

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.
- Closed Lost is a separate pipeline outcome.
- Contract execution and accounting remain in the appropriate operational systems.

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.

Regional communication preferences

Regional preferences will be supported alongside agreed communication types. Project interests and associations remain separate from communication permissions. The final preference structure, subscription types, and sending rules will be agreed during discovery; a separate subscription centre for each project or developer is not promised.

> A realtor should be able to stop receiving Surrey marketing communications while continuing to receive relevant West Side updates.

ACCEPTANCE TESTING

- Opting out of one region suppresses the relevant regional communications.
- Global unsubscribes remain respected.
- Other permitted regional communications remain available.
- Project associations do not override communication preferences.

SMS for the initial launch

SMS is a defined launch requirement: marketing text messaging for approved audiences, plus appointment confirmations and reminders. Setup and testing of the agreed initial SMS workflows are included within the confirmed launch allowances.

PROVIDER SELECTION WILL CONSIDER

- Recognizable sender numbers
- Canadian and project-specific number requirements
- Two-way communication
- Automation
- Consent
- Cost

The choice between HubSpot SMS and an integrated provider such as Salesmsg or Sakari must be confirmed before activating messaging and finalizing the SMS portion of the software purchase. If an alternative provider is selected, the HubSpot SMS add-on and segment charges will be reconciled before purchase. Canadian-origin and individual project numbers are not assumed to be available through HubSpot, and unresolved Canadian delivery or project-number capabilities are not presented as confirmed. SMS reminders are distinct from the separate transactional email product.

Subscriptions, message usage, number fees, and any custom integration development remain separate.

Two controlled AI pilots, with people in control.

The agreed initial rollout includes one website customer-agent pilot and one AI-assisted nurture pilot for an agreed audience, within the launch allowances.

Website customer-agent pilot

Uses approved Magnum Projects and project-specific 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 purchaser interests, project context, and appointment history to make sales follow-up more relevant for an agreed audience, with approved messaging, project and developer communication permissions, human review during testing, and clear exit rules.

PILOT ACCEPTANCE

- Successful controlled testing against agreed scenarios.
- Appropriate escalation.
- A named Magnum Projects owner.
- Content accuracy.
- Suppression rules.
- Usage-monitoring guidance.

> A pilot is complete when controlled testing against the agreed scenarios passes. Production activation requires Magnum approval and is not automatically required for milestone completion. Activation depends on HubSpot licensing, account eligibility, and approved content. If a vendor-dependent capability is deferred, the revised deliverable and its treatment within milestone acceptance must be agreed in writing. AI credits and software usage are separate.

Reduce duplicate entry with clear handoffs.

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

Some developers have their own Spark or other platform agreements, so HubSpot may initially operate alongside existing systems. Contract management may remain in the developer's existing platform. Spark, Lasso, or another system is not assumed to be retired, and no working integration is assumed. Discovery will identify:

- Required fields
- Supported interfaces
- Data direction
- The role of each system, available exports, and approved interim handoffs
- Handoff milestones
- Matching identifiers
- The authoritative source for each milestone
- An agreed owner, frequency, and scope for any manual transfer or recurring export

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

DELIVERABLE

A feasibility assessment, field mapping, and agreed handoff plan, including the owner, frequency, and scope of any interim transfer or recurring export. Custom integration development receives a separate scope and price. An approved interim handoff may support the initial launch; unlimited ongoing data-transfer services are not included.

Developer approval support

Preparation of one concise, reusable developer-facing overview is included to support developer approval of the phased initial rollout.

- Proposed sales and marketing improvements
- Follow-up and appointment reminder capabilities
- Software and implementation cost categories
- Project reporting and prospect visibility
- The phased transition approach

Platform comparisons will use verified capabilities and agreed requirements. Participation in developer review calls is limited to an allowance agreed before kickoff. Additional presentations, calls, and project onboarding are scoped separately. Savings, cost allocations, and conversion improvements are not guaranteed.

Clear project and developer reporting from inquiry to purchase.

Core HubSpot reporting will provide project-level inquiries, lead sources, campaign performance, walk-ins, scheduled and completed appointments, repeat visits, active opportunities, contracts, conversions, and follow-up coverage. Management will have visibility across the agreed projects, with project-specific reporting suitable for developer reviews. Metric definitions will be confirmed during discovery.

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
- Overdue follow-up
- Stalled opportunities
- 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.

Magnum Projects Success Center

Launch training and ongoing reference, in one place.

The initial Magnum Projects 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
- Project sales journeys
- Tasks and follow-up
- Regional preferences and communication permissions
- Initial SMS workflows and consent
- AI pilot guidance
- Dashboards

Role-based training

Live role-based training will use the agreed initial rollout configuration and training allowances. Designated sales, marketing, and management users will receive a walkthrough of the Success Center, regional preferences, project access, and 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

Four phases, each with a clear completion threshold.

The delivery schedule will be agreed at kickoff around developer approvals, existing system agreements, data availability, and team readiness. The four phases apply to the agreed initial rollout; future projects are not a condition of launch.

Discovery and kickoff

Initial rollout scope, readiness inventory, responsibilities, launch allowances, and implementation plan agreed.

CRM foundation and data

Core CRM structure, project access design, data mappings, and sample migration approved.

Workflow and reporting readiness

Agreed forms, routing, scheduling, communication preferences, follow-up workflows, SMS configuration, and dashboards approved after testing; AI pilots reviewed.

Training and initial launch

Approved initial rollout launched, migration reconciled, training delivered, and the initial Magnum Projects Success Center available.

> Testing will include team permissions, record ownership, multi-project contacts, regional suppression, other permitted regional communications, global unsubscribes, project associations not overriding preferences, routing, reminders, initial SMS workflows, workflow exits, reporting reconciliation, and approved handoffs. Launch support duration will be agreed at kickoff. Any vendor-dependent deferral requires written agreement on its revised deliverable and milestone treatment; separately commissioned integrations have their own schedule.

Investment and payment thresholds

Total implementation fee

$8,000 CAD

Plus applicable taxes.

The fee applies to the agreed initial rollout: discovery, CRM configuration and data migration, project registrations, inquiry routing, appointment booking, sales templates and follow-up automation, regional communication preferences, agreed initial SMS setup and testing, the two defined AI pilots, core sales, marketing and daily traffic reporting, integration discovery and handoff planning, one reusable developer overview, role-based training, the initial Magnum Projects Success Center, testing, and launch support. Project counts and launch allowances will be confirmed before kickoff. Additional project migrations and material expansion are scoped separately.

Payment schedule

Payment	Completion threshold	Amount
1 of 4	Implementation acceptance and kickoff, with the initial rollout scope and responsibilities agreed.	$2,000 CAD
2 of 4	Approval of the core CRM structure, project access design, data mappings, and sample migration.	$2,000 CAD
3 of 4	Approval of the agreed forms, routing, scheduling, communication preferences, follow-up workflows, SMS configuration, and dashboards following testing, with AI pilots completing controlled scenario testing.	$2,000 CAD
4 of 4	Approved initial rollout launched, migration reconciled, training delivered, and the initial Magnum Projects Success Center available.	$2,000 CAD
Total	**Four equal milestone installments**	**$8,000 CAD**

Milestones are based on completion of the agreed initial-rollout deliverables, rather than elapsed calendar time. Written milestone approval will confirm that the applicable threshold has been reached. If a vendor-dependent capability is deferred, its revised deliverable and treatment within milestone acceptance must be agreed in writing. Final payment does not depend on all Magnum developers or future projects migrating. Invoice payment terms will be confirmed in the final agreement.

HubSpot software and third-party costs

HubSpot's software subscription is separate from Betcher Consulting Group's implementation services. The revised software offer is based on 10 Sales Hub Enterprise seats. The initial rollout may involve a smaller active user group, but this does not reduce the quoted seat commitment. HubSpot's current quote governs pricing, inclusions, billing, and expiry.

SOFTWARE SUMMARY, FROM THE CURRENT HUBSPOT QUOTE

10 Sales Hub Enterprise seats and 5 Core seats.

10,000 marketing contacts.

First-year subscription: $58,380 CAD before tax.

Annual billing with a 12-month commitment.

Current quote expiry: November 13, 2026.

HubSpot's current quote governs pricing, inclusions, billing, and expiry.

HubSpot bills the software subscription annually under a 12-month commitment. This is separate from Betcher Consulting Group's four implementation installments, which are tied to delivery milestones. Software acceptance must be completed by an authorized Magnum Projects purchaser using the access HubSpot requires.

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Third-party subscriptions, SMS message usage, number fees, AI credits, vendor interface fees, middleware, hosting, and custom integration development are separate and will be identified for approval before commitment. The SMS provider must be confirmed before messaging activation and finalizing the SMS portion of the software purchase.

Ongoing consulting

Ongoing consulting after the agreed launch support period is optional, with scope, capacity, and fees agreed separately. No monthly retainer is included in this proposal.

Terms to confirm before implementation acceptance

The following commercial terms are not yet settled. This proposal remains a review draft until each is confirmed.

Term	Status
Invoice payment due dates	To be confirmed in the final agreement
Launch-support duration and included support	To be confirmed at kickoff
Authorized milestone approver	To be confirmed by Magnum Projects
Review and acceptance process	To be confirmed in the final agreement

Who does what, and when it is complete.

Betcher Consulting Group

- Initial rollout design and configuration
- Agreed data mapping and migration
- Templates, regional preferences, SMS workflows, and reporting
- Integration discovery and handoff planning
- One reusable developer overview and agreed review-call allowance
- Training and launch support

Magnum Projects

- Inventory with Kristen and Senen
- Timely access, source data, and developer approvals
- Approved branding, sender details, and content
- Business owners and interim transfer responsibilities
- Participation in preference, access, and workflow testing
- Approval of the initial blueprint, migration, milestones, 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 Magnum Projects
Core CRM structure, sales pipeline, and project access design	Team permissions, record ownership, and multi-project contacts tested against the selected subscription and approved
Initial data migration	Sample migration approved; agreed initial migration reconciled
Forms, routing, scheduling, templates, workflows, and dashboards	Documented scenario tests within confirmed launch allowances

Deliverable	Acceptance method
Regional communication preferences	Regional opt-outs suppress the relevant region; other permitted regions remain available; global unsubscribes respected; project associations do not override preferences
Initial SMS configuration and workflows	Provider and purchase selection confirmed; approved-audience marketing, appointment confirmations, and reminders tested within launch allowances
Integration discovery and interim handoffs	Feasibility assessment and field mapping; interim transfer owner, frequency, and scope agreed
Developer approval support	One concise reusable overview prepared; developer review-call allowance agreed before kickoff
Initial AI pilots	Successful controlled testing against agreed scenarios, including content accuracy, appropriate escalation, suppression rules, a named Magnum Projects owner, and usage-monitoring guidance. Production activation requires Magnum approval and is not required for milestone completion.
Magnum Projects Success Center	The agreed launch content is available, links work, instructions reflect the launch configuration, and designated users have access.
Initial rollout launch	Approved initial rollout launched, migration reconciled, training delivered, and Success Center available

> Completion will be assessed against working business scenarios and the approved initial rollout scope. Separately scoped integrations are not a requirement for initial acceptance when an approved interim handoff supports launch. Deferred vendor-dependent capabilities require written agreement on revised deliverables and milestone treatment. Final payment does not depend on all Magnum developers or future projects migrating. Additional migrations, material expansion, extra developer presentations or calls, historical reconstruction, and custom development require separate scope approval.

14 · NEXT STEPS

Where we go from here.

1. Confirm the project inventory and initial rollout candidates with Kristen and Senen.
2. Validate subscription preferences, project access, and the SMS approach.
3. Confirm required developer approvals and existing-system arrangements.
4. Finalize and sign off on the HubSpot quote with Jonathan Sullivan, HubSpot representative, including the SMS selection and any applicable deadline.
5. Approve the implementation proposal and its launch allowances.
6. Schedule kickoff.

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