

HubSpot for Real Estate

Aptitude 8 + PandaDoc

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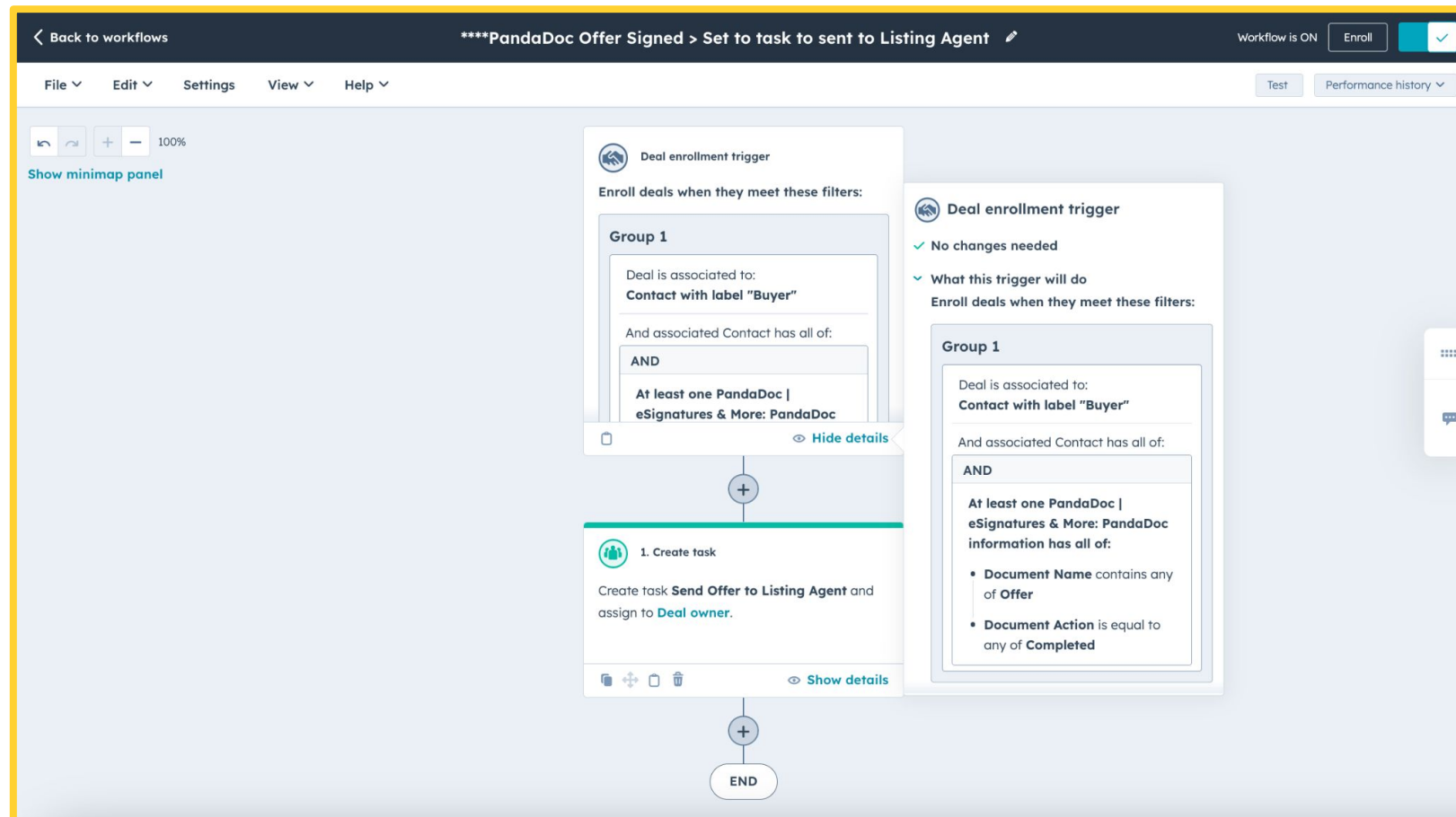
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HubSpot for Real Estate

An efficient customer relationship management system is crucial for real estate success. Clients are, after all, the business. HubSpot is a great fit to meet the specific needs of real estate professionals.

From lead generation and nurturing to closing deals and maintaining client relationships, HubSpot and PandaDoc offer the perfect suite of tools designed to enhance productivity and drive growth in the real estate industry.



The screenshot displays a HubSpot workflow configuration page titled "****PandaDoc Offer Signed > Set to task to sent to Listing Agent". The workflow is currently "ON" and has an "Enroll" button. The interface includes a top navigation bar with "File", "Edit", "Settings", "View", and "Help" menus. A "Test" button and "Performance history" dropdown are also visible. The main workspace shows a flowchart with the following steps:

- Deal enrollment trigger:** Enroll deals when they meet these filters:
 - Group 1:** Deal is associated to: **Contact with label "Buyer"**. And associated Contact has all of:
 - AND:** At least one PandaDoc | eSignatures & More: PandaDoc
- 1. Create task:** Create task **Send Offer to Listing Agent** and assign to **Deal owner**.
- END**

Two detail panels are open on the right side of the workflow:

- Deal enrollment trigger:** Shows "No changes needed" and "What this trigger will do".
- Group 1 (filters):** Shows "Deal is associated to: Contact with label 'Buyer'" and "And associated Contact has all of: AND: At least one PandaDoc | eSignatures & More: PandaDoc information has all of: Document Name contains any of Offer, Document Action is equal to any of Completed".





Design a platform that works for your team

Build a Custom Data Model in HubSpot

The first step to implementing HubSpot for your team is building out a data model that works for your business.

Utilize custom objects as well as HubSpot's out-of-the-box objects to represent relevant real estate objects like:

- Contacts ➤ Potential buyers and sellers.
- Companies ➤ Real estate agencies and partners
- Deals ➤ Offer pipelines
- Custom Objects ➤ Listings, Properties, etc.

Search HubSpot

2990 Hammerwood Dr

Listing Price: 310,000

Primary Info

MLS ID	Property Address	Area	Tax ID
172849267	2990 Hammerwood Dr	Spring Branch	012-345-678-899
City	Geo Country	Geo Market Area	Subdivision
Las Vegas	Harris	Spring Branch	Spring Haven
Approx SQFT	Approx Lot SqFT	Lot #	Block #
4,572	3,700	1	3
Listing Price	MLS Days On Market	Postal Code	Additional Bedroom
310,000	14	77024	3
Baths Full	Tax Year	Directions	
3	2023	go left on 1488 then turn right onto Hammerwood Dr.	

Rooms Info

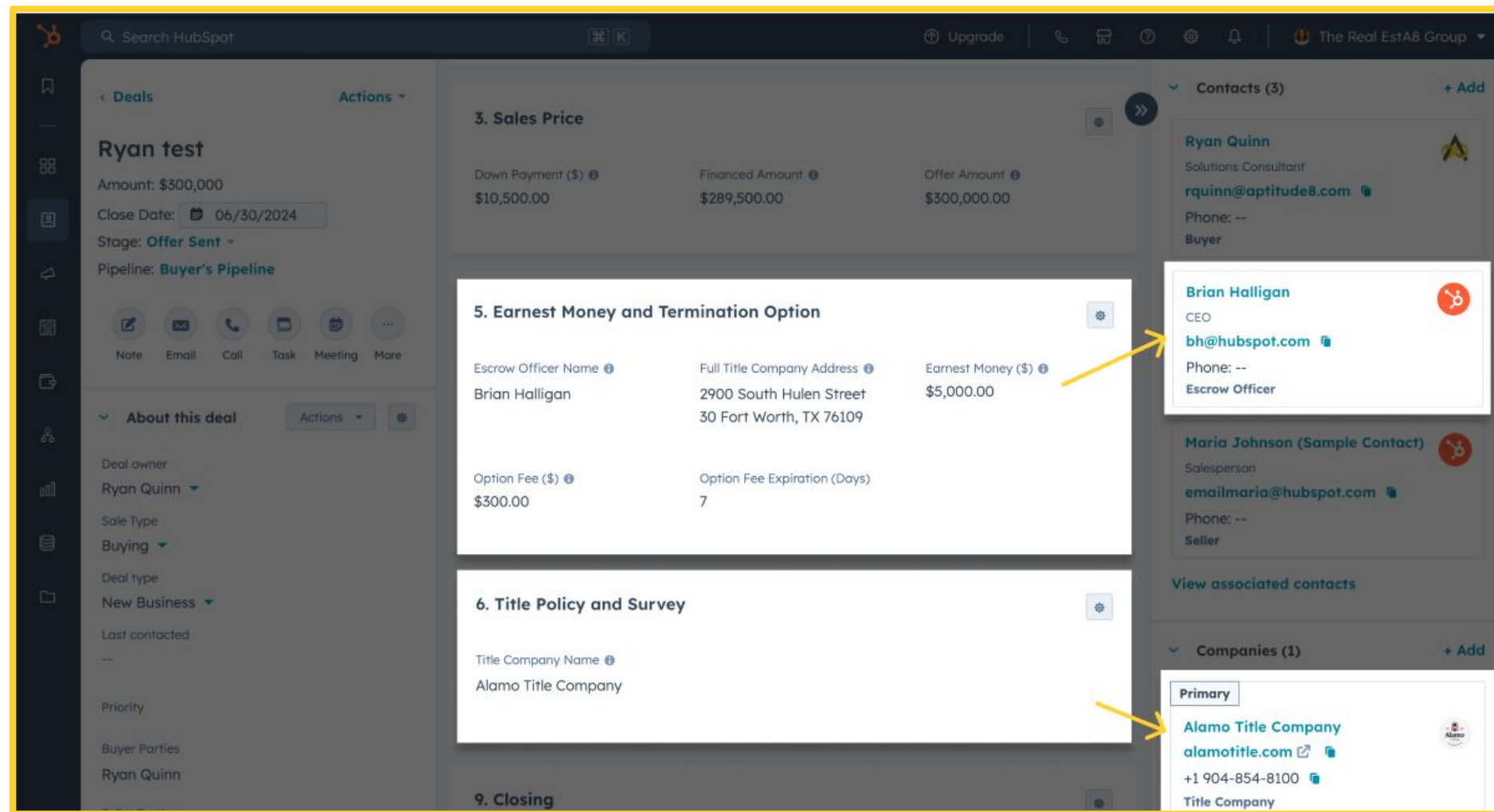
Master Bathroom	Bedroom 2 Length	Bedroom 3 Length	Bedroom 4 Length
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Keeping your data aligned and up-to-date with HubSpot

Dynamic Data Management

HubSpot's dynamic data management features provide the flexibility and customization you need so you can:

- Automatically update records with new offer or listing data for continuous synchronization.
- Populate fields automatically, while allowing agents to manually fill specific fields as needed.
- Utilize conditional fields based on contract requirements, with the option for manual input where necessary.



Enhance your workflow with HubSpot and PandaDoc integration

Documentation Processes

Integrating HubSpot with PandaDoc enables real estate professionals to automate and simplify their documentation process. By leveraging this powerful combination, you can ensure consistency, accuracy, and efficiency in managing real estate transactions.

- Utilize HubSpot properties to auto-populate deal, client and property specifics directly into PandaDoc.
- Automatically pull in escrow officer details, title company addresses, and offer information from HubSpot to PandaDoc.
- Set up role-based signing workflows in PandaDoc to assign roles for buyers and sellers, and automatically include buyer initials and signatures.

PROMULGATED BY THE TEXAS REAL ESTATE COMMISSION (TREC) 11-07-2022
ONE TO FOUR FAMILY RESIDENTIAL CONTRACT (RESALE)
NOTICE: Not For Use For Condominium Transactions

1. PARTIES: The parties to this contract are Maria Johnson (Seller) and Ryan Quinn (Buyer).
Seller agrees to sell and convey to Buyer and Buyer agrees to buy from Seller the Property defined below.

2. PROPERTY: The land, improvements and accessories are collectively referred to as the Property (Property).

A. LAND: Lot 1 Block 3, montrose
Addition, City of Houston, County of Harris,
Texas, known as _____,
(address/zip code), or as described on attached exhibit.

B. IMPROVEMENTS: The house, garage and all other fixtures and improvements attached to the above-described real property, including without limitation, the following **permanently installed and built-in items**, if any: all equipment and appliances, valances, screens, shutters, awnings, wall-to-wall carpeting, mirrors, ceiling fans, attic fans, mail boxes, television antennas, mounts and brackets for televisions and speakers, heating and air-conditioning units, security and fire detection equipment, wiring, plumbing and lighting fixtures, chandeliers, water softener system, kitchen equipment, garage door openers, cleaning equipment, shrubbery, landscaping, outdoor cooking equipment, and all other property attached to the above described real property.

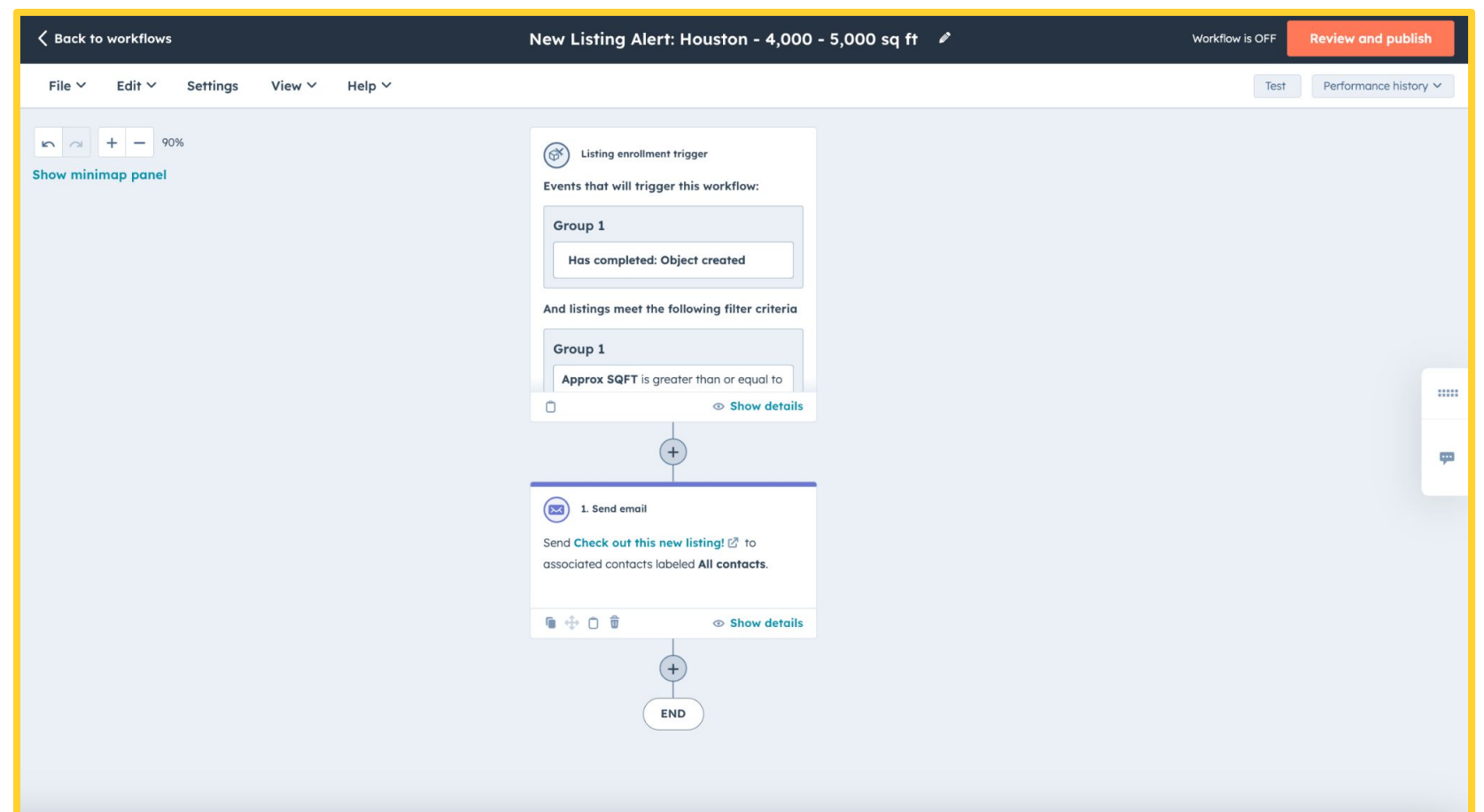
C. ACCESSORIES: The following described related accessories, if any: window air conditioning units, stove, fireplace screens, curtains and rods, blinds, window shades, draperies and rods, door keys, mailbox keys, above ground pool, swimming pool equipment and maintenance accessories, artificial fireplace logs, security systems that are not fixtures, and controls for: (1)

From leads to loyalty, build relationships and drive growth effortlessly

Capture, Nurture & Convert

Relationship building is important in real estate. Nurture those relationships with a little help from HubSpot.

- Use HubSpot's forms and landing pages to capture leads from your website and social media channels automatically.
- Prioritize your leads based on engagement and property preferences to focus your efforts.
- Create and send targeted email campaigns to nurture leads with relevant property listings and market updates.



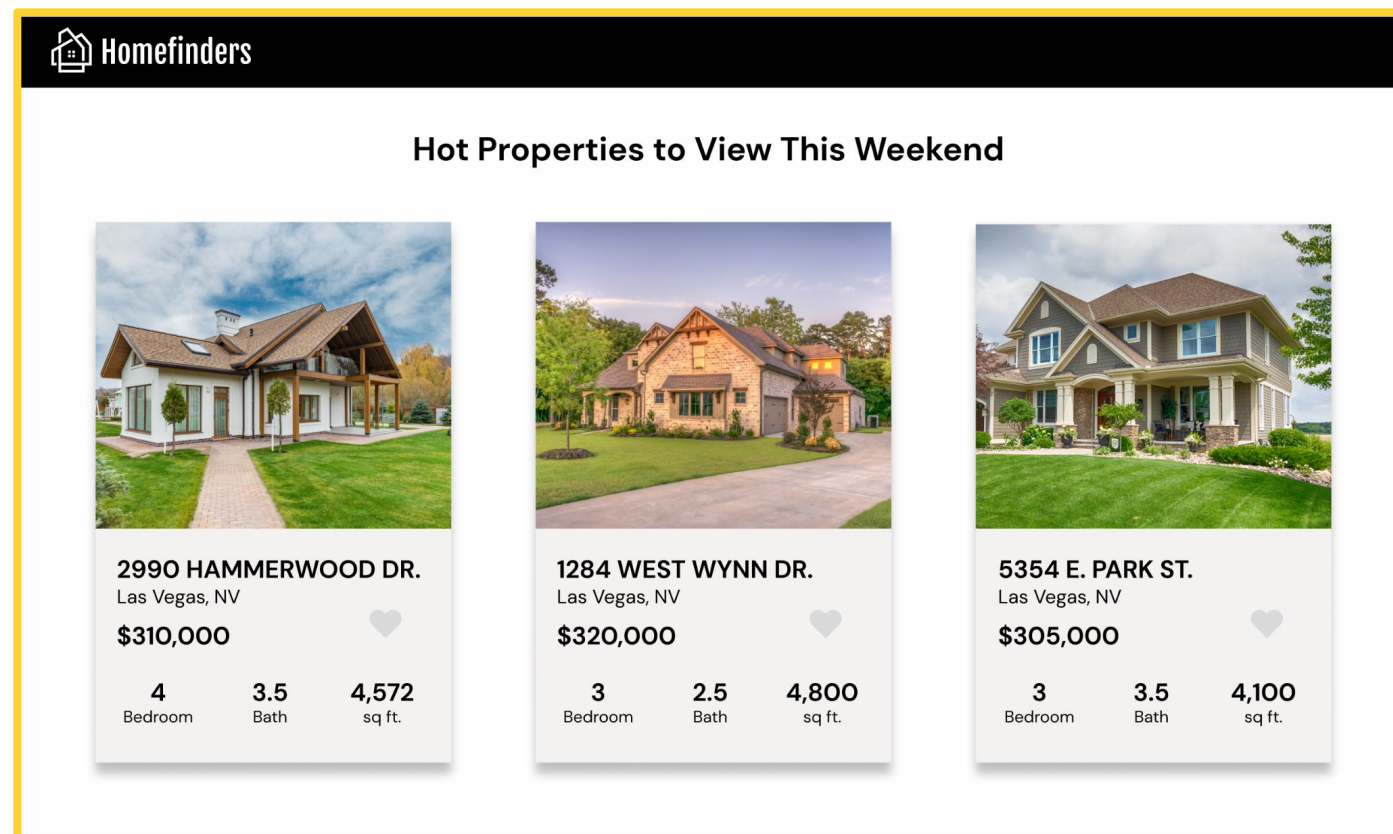
Keep your listing site up to date

Manage Property Listings

You can easily create and manage property listing pages with a listing object complete with detailed information, descriptions, photos, etc.

Using the listing object record, you can leverage CMS Hub to create a dynamic and personalized listing webpage that updates in real-time, ensuring your website is always current.

You can also track interactions with each property, enabling seamless follow-up and nurturing of potential leads.



The screenshot shows a section titled "Hot Properties to View This Weekend" on the Homefinders website. It features three property listings, each with a photo, address, location, price, and specifications (bedrooms, bathrooms, and square footage).

Property Address	Location	Price	Bedrooms	Bathrooms	Sq. Ft.
2990 HAMMERWOOD DR.	Las Vegas, NV	\$310,000	4	3.5	4,572
1284 WEST WYNN DR.	Las Vegas, NV	\$320,000	3	2.5	4,800
5354 E. PARK ST.	Las Vegas, NV	\$305,000	3	3.5	4,100

Enhance efficiency with automated scheduling and reminders

Manage Showings

HubSpot's custom CRM Cards enable seamless creation and management of showing appointments for each property. Real estate professionals can leverage a custom Scheduling Card to ensure appointments are organized and tracked effectively.

Additionally, HubSpot allows automation of showing reminders, ensuring timely notifications to prospective buyers and minimizing the risk of no-shows.

The screenshot displays the HubSpot CRM interface for a listing at 2990 Hammerwood Dr. The listing price is \$310,000. The 'Showing Scheduler' is active, showing a calendar for August 13-19, 2024. The scheduler displays a grid of time slots with property addresses and times. A red box highlights the time slot for Tuesday, August 15, 1 pm - 2 pm. The 'Schedule Showing' button is visible at the bottom right of the scheduler.

Time	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19
8 am			173 Old Town Rd. 8 am - 9 am				
9 am	173 Old Town Rd. 9 am - 10 am			173 Old Town Rd. 9 am - 10 am			
10 am				15 W. Foster Ct. 10 am - 11 am			595 Windy H... 10 am - 11 am
11 am						124 Eastern... 11 am - 12 pm	
12 pm					12 Flat Dr. 12 pm - 2 pm		
1 pm		12 Flat Dr. 1 pm - 2 pm				654 Forbes A... 1 pm - 2 pm	
2 pm	123 Seashell Cir. 2 pm - 3 pm	192 Wayside Dr. 2 pm - 3 pm	15 W. Foster Ct. 2 pm - 3 pm				192 Wayside Dr. 2 pm - 3 pm
3 pm							

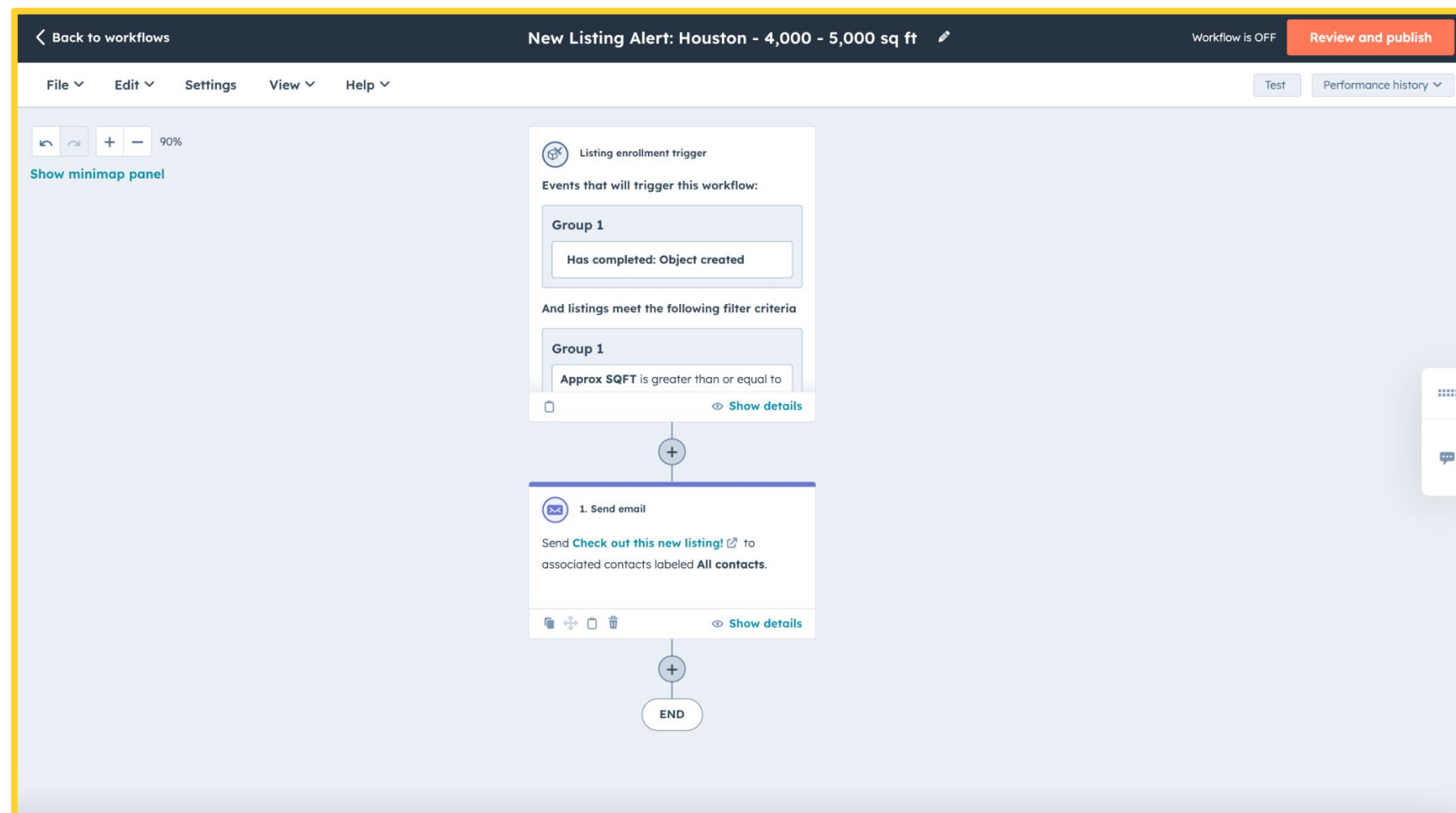
Ensure stakeholder awareness with real-time status notifications

Property Updates

With HubSpot, real estate professionals can automatically update property statuses such as available, under contract, and sold.

These updates are instantly communicated to interested buyers, ensuring they receive timely notifications and stay informed about the latest developments.

This streamlines the process, allowing real estate agents to focus more on closing deals and less on manual updates.



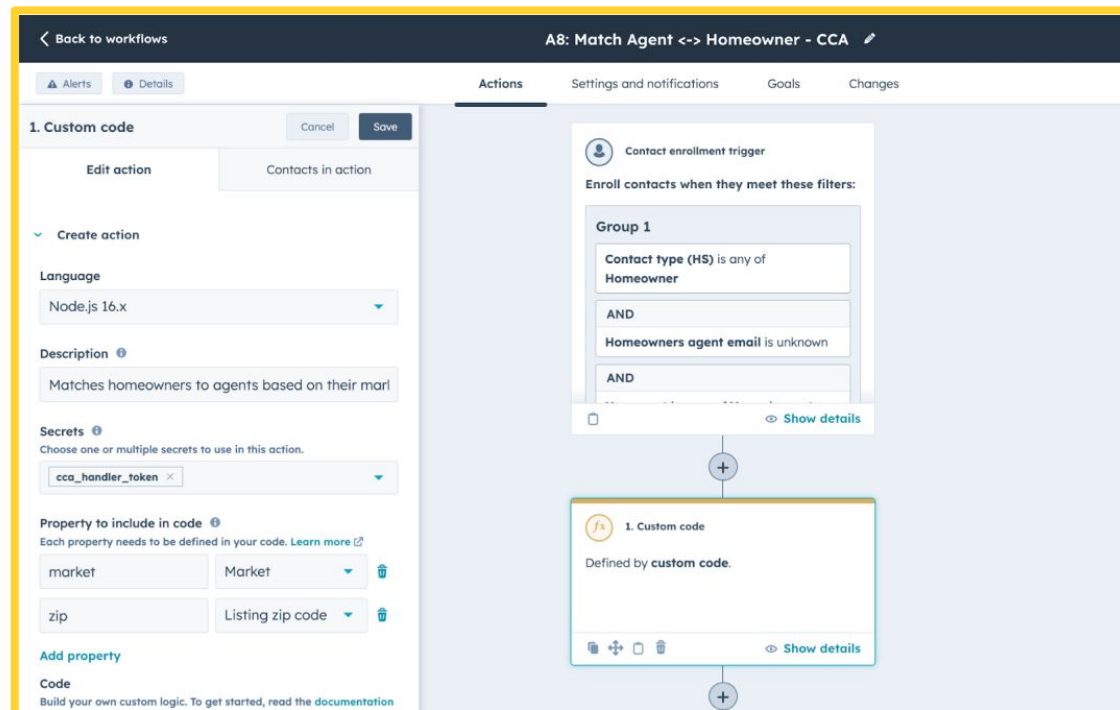
Case Study

Curbio Optimizes Partnership Ops

Curbio stands as the leading pre-listing option in the country, catering to agents and homeowners preparing to sell.

Aptitude 8 helped a Curbio, real estate company streamline their operations and enhance client relationships by implementing HubSpot and integrating it with PandaDoc. This project resulted in:

- ↑ Increased partnership activities
- ↑ Increased marketing ops capacity
- ↑ Increased visibility



HubSpot for Real Estate

Ready to get started?

Chat with our team and see if HubSpot and PandaDoc are the right choices for your real estate business. Discover how our customized solutions can transform your operations, enhancing efficiency and client satisfaction.

With HubSpot's robust capabilities and PandaDoc's seamless integration, your agency can streamline processes, manage listings, and build lasting client relationships. Connect with us today to explore the potential of HubSpot and PandaDoc, tailored to your unique needs.

Reach out at aptitude8.com/contact-us