

HubSpot for Real Estate

Aptitude 8 + PandaDoc

Table of Contents

[Introduction](#)

[Build a Real Estate Data Model](#)

[Dynamic Data Management](#)

[Documentation Processes](#)

[Capture, Nurture & Convert Leads](#)

[Manage Property Listings](#)

[Manage Showings](#)

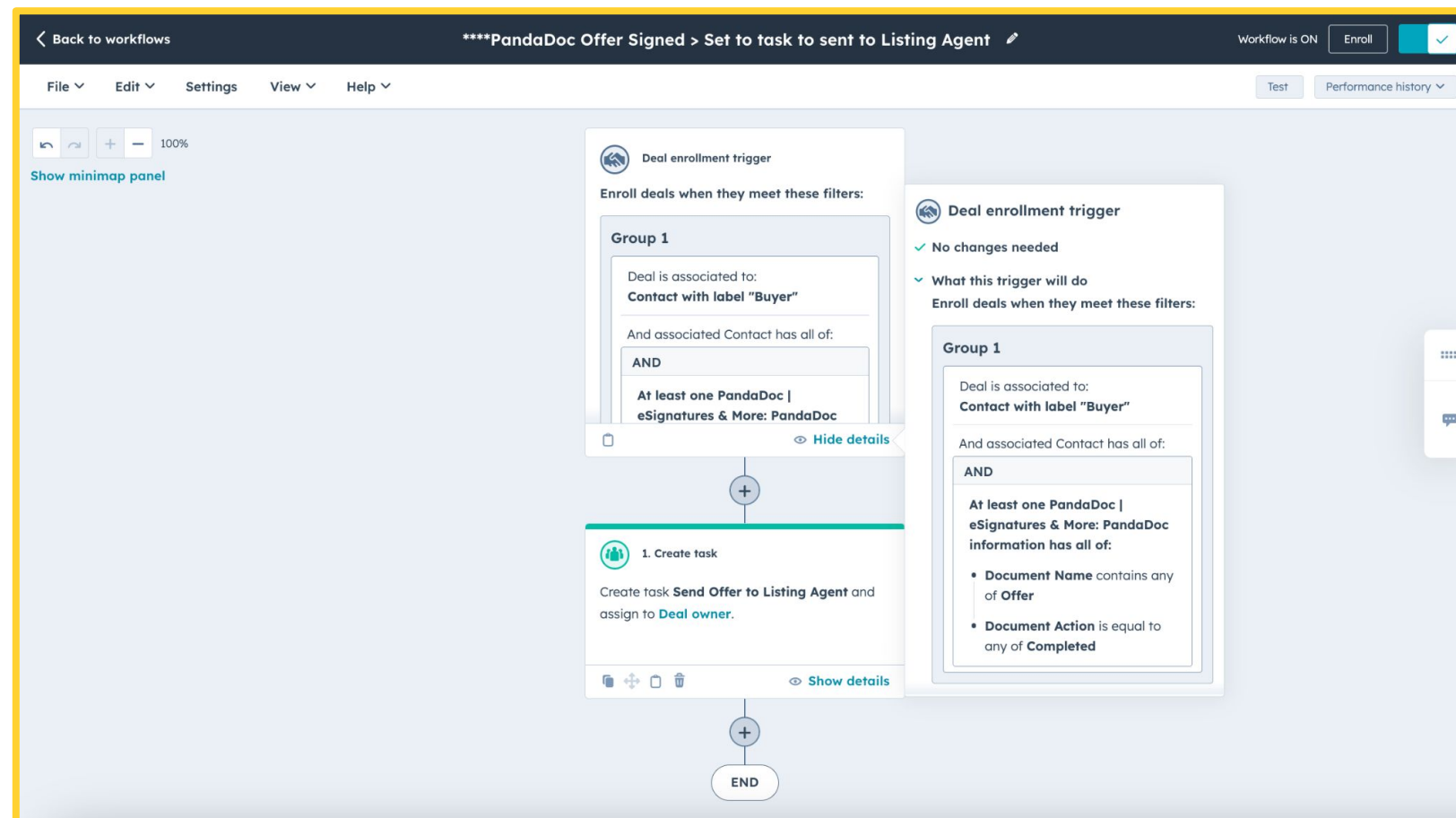
[Property Updates](#)

[Real Estate Case Study](#)

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.





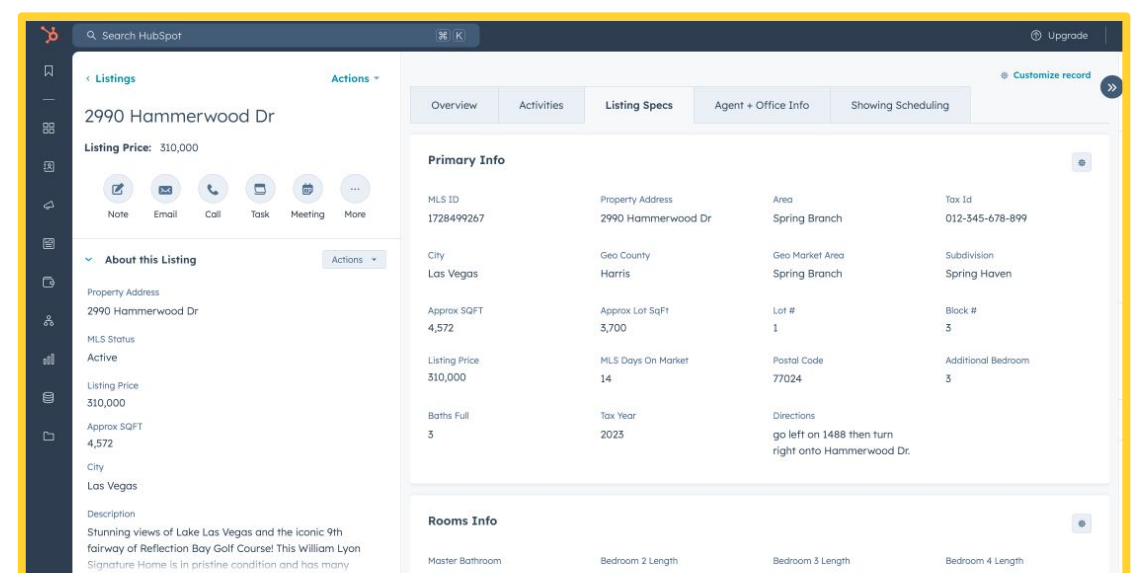
Design a platform that works for your team

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.

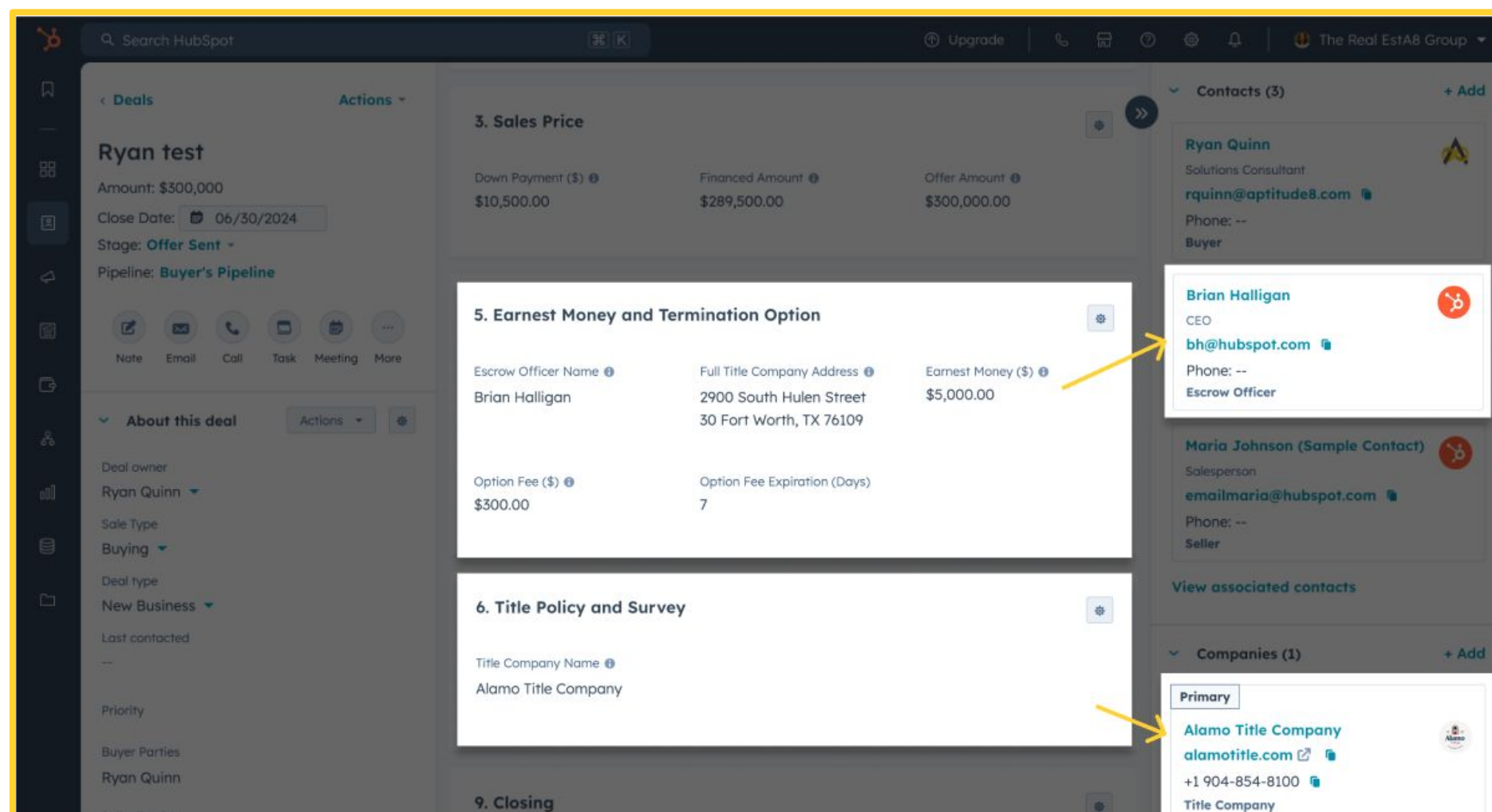


Keeping your data aligned and up-to-date with HubSpot

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.

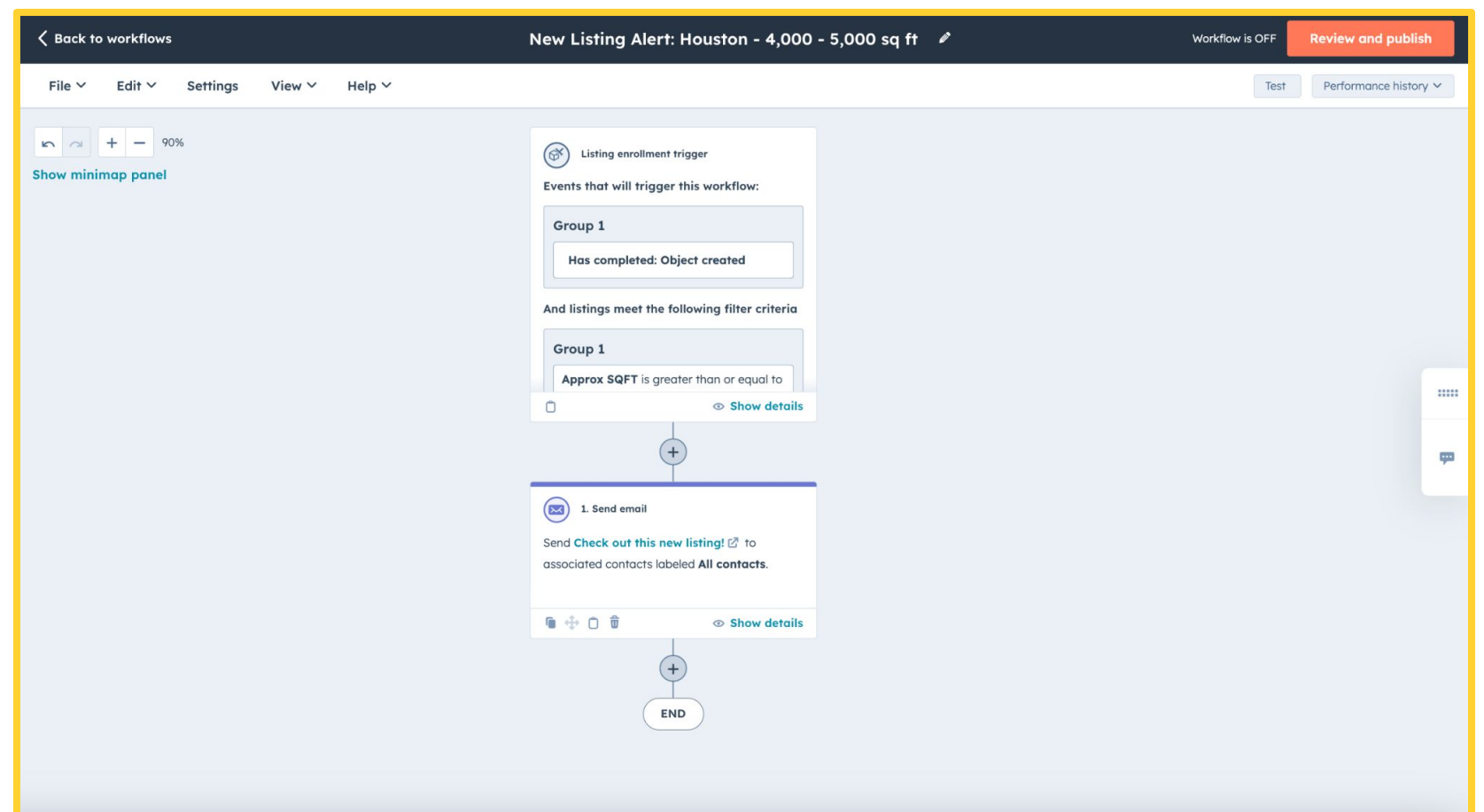
C. ACCESSORIES: The following described related accessories, if any: window air conditioning units, stove, fireplace screens, curtains and rods, blinds, window shades, draperies and rods, door keys, mailbox keys, above ground pool, swimming pool equipment and maintenance accessories, artificial fireplace 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.




Hot Properties to View This Weekend




2990 HAMMERWOOD DR.
Las Vegas, NV
\$310,000

4 Bedroom **3.5** Bath **4,572** sq ft.



1284 WEST WYNN DR.
Las Vegas, NV
\$320,000

3 Bedroom **2.5** Bath **4,800** sq ft.



5354 E. PARK ST.
Las Vegas, NV
\$305,000

3 Bedroom **3.5** Bath **4,100** sq ft.

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 property listing. On the left, the 'Listings' sidebar shows details for '2990 Hammerwood Dr' with a listing price of 310,000. The main content area features a 'Showing Scheduler' calendar for the week of August 13-19, 2024. The calendar shows various time slots with scheduled showings for different properties. A red box highlights a slot on Tuesday, August 15, at 1 pm - 2 pm. The right sidebar shows 'Contacts (0)', 'Deals (1)' (including 'Ryan test' with a close date of June 30, 2024), and 'Attachments'.

Property Listing Details:

- Property Address: 2990 Hammerwood Dr
- MLS Status: Active
- Listing Price: 310,000
- Approx SQFT: 4,572
- City: Las Vegas
- Description: Stunning views of Lake Las Vegas and the iconic 9th fairway of Reflection Bay Golf Course! This William Lyon Signature Home is in pristine condition and has many
- Directions: go left on 1488 then turn right onto Hammerwood Dr.
- Dwelling Type: Single Family Detached
- Elementary School: Harvard Elementary

Showing Scheduler Calendar (Aug. 13, 2024 - Aug. 18, 2024):

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							

Time Selected: Tue, 8/15, 1 pm - 2 pm

Buttons: < Previous Step, Schedule Showing

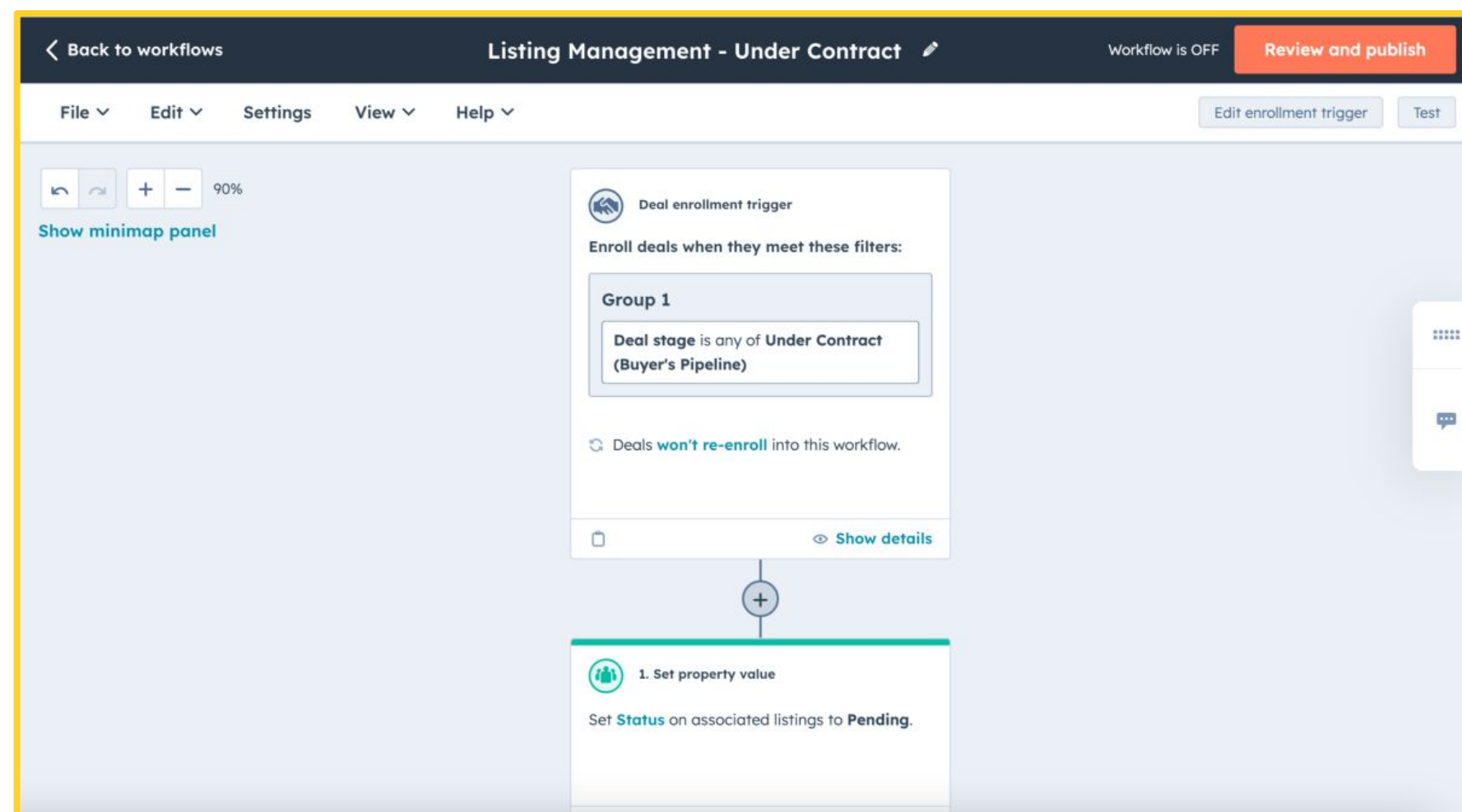
Ensure stakeholder awareness with real-time status notifications

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.



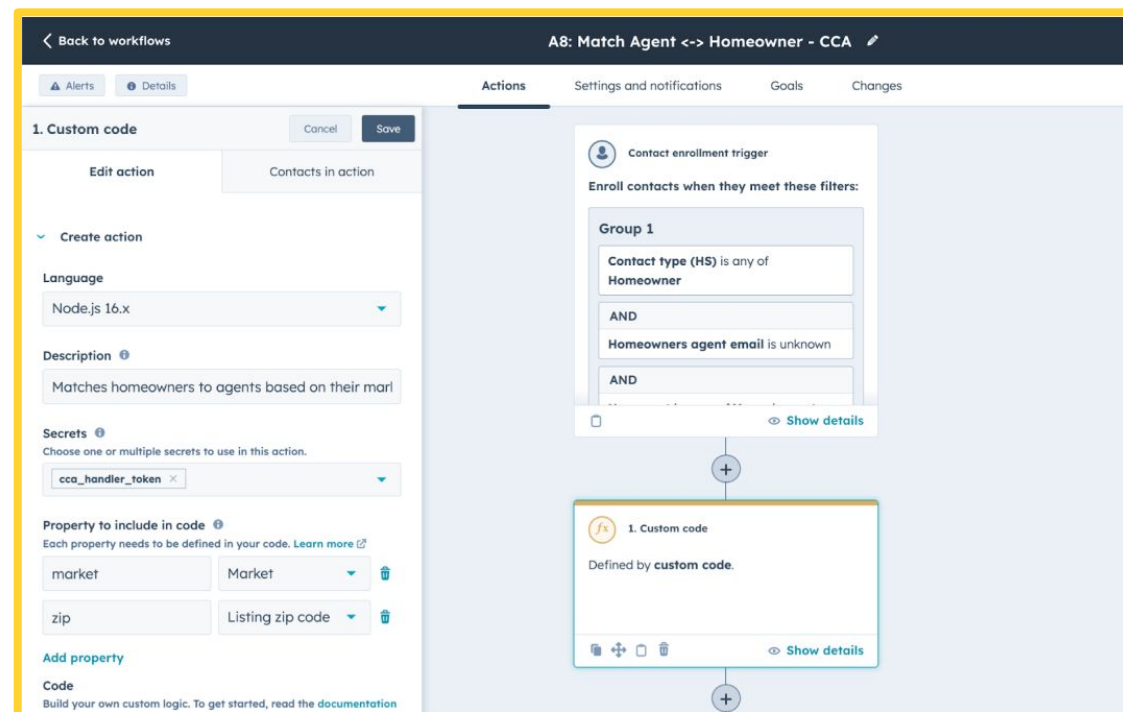
Case Study

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