# Adding a New Project

HubSpot: forms, sequences, workflows, assignments, emails and Realtor associations

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*This SOP will be refined as additional Olson Homes project requirements and dependencies are confirmed.*

# 1. Purpose

This SOP defines the repeatable process for adding a new Olson Homes project to HubSpot. It is intended to keep project naming, contact properties, QR registration forms, sales assignments, automated emails, workflows and Realtor associations aligned before a project goes live.

# 2. Scope

Use this SOP whenever a new Olson Homes project requires setting up including:

- Registration Forms including:
  - Online
  - Onsite Broker QR Form
  - Onsite Prospect QR Form

The procedure covers HubSpot configuration and end-to-end testing. It does not cover creative production or physical placement of the finished QR code unless those tasks are specifically assigned as part of the launch.

# 3. Roles and Responsibilities

| Role | Responsibility |
| --- | --- |
| Process owner / HubSpot administrator | Completes configuration, workflow updates, testing and launch documentation. |
| Olson Homes project contact | Confirms the official project name, assigned salespeople, email content, launch timing and final approval. |
| Assigned salesperson or team | Confirms routing and receives the test registration or internal notification when applicable. |

# 4. Required Information Before Starting

Do not begin production configuration until the following information is available or clearly marked as pending:

- Official project display name and approved spelling/capitalization.
- HubSpot internal value or naming convention for the project option.
- Assigned salesperson, sales team or contact owner.
- Onsite prospect and broker form requirements.
- Approved Thank You for Registering email copy, links and sender details.
- Target launch date and person authorized to approve activation.

- Test contact details that will not interfere with live reporting.

> **Naming control:** Use the identical approved project name across the Associated Communities property, forms, hidden fields, branches, emails, lists and reports. Confirm the display label and internal value before activating workflows. The former Realtor Client Communities property has been archived and must not be recreated or referenced.

## 5. Procedure

### Step 1: Confirm the project setup record — included in 8. Setup Record

**Objective:** Create one source of truth for the project before editing HubSpot.

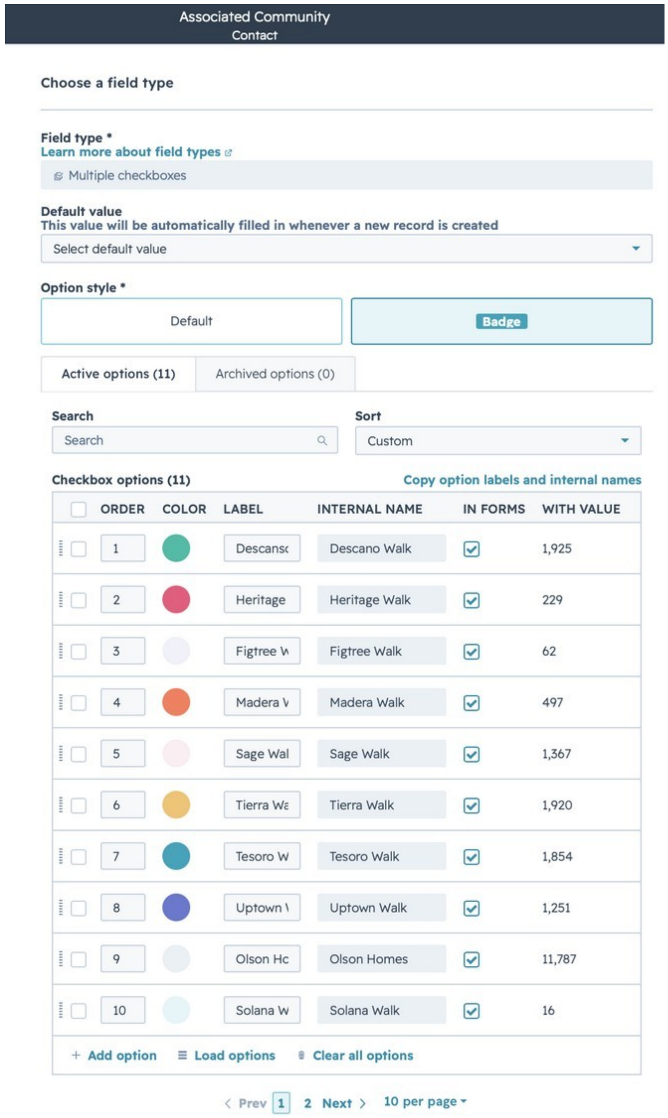
- Record the approved project name, internal value, salesperson assignment, form names, email names, workflow names and launch date.
- Identify an existing Olson project that will serve as the cloning model.
- Confirm whether both onsite and broker QR experiences are required.

> **Completion check:** The approved project name and cloning model are documented, and all unknown items are visibly marked as pending.

### Step 2: Update the Associated Communities property

**Objective:** Make the new project available through the single Associated Communities contact property used for both prospects and Realtors.

- Open the **“Associated Communities”** property and add the new project as an available option.
- Confirm the display label follows the approved spelling and capitalization.
- Confirm the internal value follows the existing Olson naming convention before saving.
- Verify the new option is available on a test contact record.




*HubSpot Associated Community property — add the new project as an active option.*

> **Important:** Associated Communities is a multi-value history field. Downstream actions should append the new project, not replace communities already recorded on the contact.

> **Completion check:** The new project can be selected on a contact without changing or removing existing community values.

## Step 3: Create or update all onsite QR registration and online forms

**Form Names:**

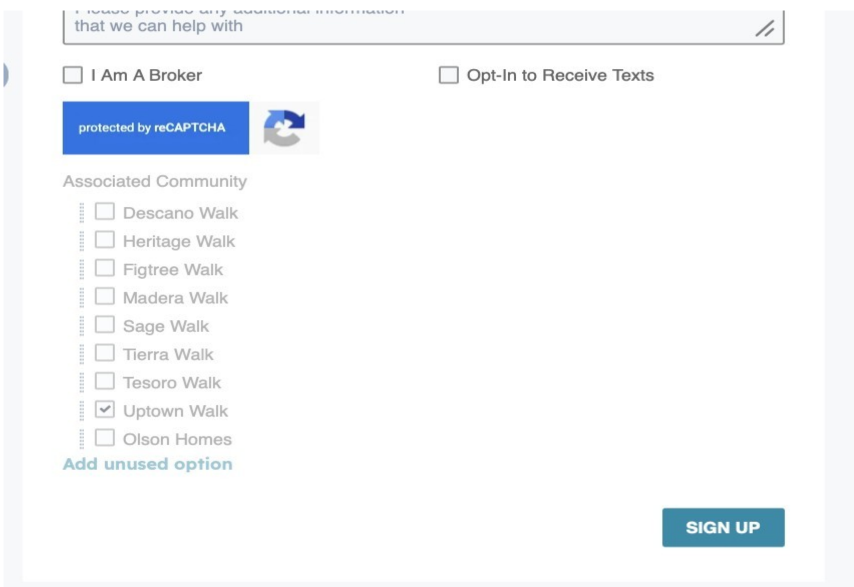
1. ONSITE QR BROKER – (Project Name)
2. ONSITE QR REGISTRATION – (Project Name)

3. WEBSITE FORM – (Project Name)
4. ONLINE REG-DELAYED FOLLOW UP – (Project Name)

**Objective:** Configure the new project's onsite prospect and broker/Realtor forms with the correct mappings.

> **Note:** After updating the Associated Communities property, use the “Add unused option” link at the bottom of the communities list to include the new community.

- Clone the corresponding onsite prospect form from the approved model project and rename it for the new project.
- Clone the corresponding onsite Broker/Realtor form and rename it for the new project.
- Set the hidden project/community field to the new project's approved value.
- Confirm every visible and hidden field maps to the correct HubSpot property.
- Verify the applicable RAW phone fields, consent fields and required fields are present.
- Confirm form styling, field order and submit-button treatment match the current Olson standard.
- Publish the forms and generate or update the final QR destinations only after workflow testing is complete.




*Onsite form — Associated Community options with “Add unused option” link.*

> **Completion check:** A test submission from each form creates or updates the intended prospect data and records the correct project.

## Step 4: Assign the appropriate salespeople to a new Team

**Objective:** Route registrations for the new project to the correct salesperson, team or contact owner.

- Confirm the Olson-approved salesperson or sales team for the project.
- Update project-specific owner assignment actions in the cloned or shared workflows.
- Review internal notifications, tasks or routing actions that also reference a salesperson.
- Confirm any salesperson-specific details used in automated emails are current.

> **Completion check:** A test registration is assigned and routed to the expected person or team.

## Step 5: Create the Thank You for Registering emails

**Objective:** Provide the correct follow-up experience for both registration paths.

- Clone the approved prospect registration email and update the project-specific name, content, links, salesperson details and branding.
- Clone or update the broker/Realtor registration email when that experience differs from the prospect email.
- Confirm the sender name, sender address, subject line, preview text and suppression rules.
- Send internal test emails and check every link on desktop and mobile.
- Record the exact email asset selected for each workflow.

> **Completion check:** The correct email is selected in each workflow and the final test version is approved.

## Step 6: Clone and configure the standard project sequences

**Objective:** Create the project-specific automation required for registration, routing and follow-up.

- Clone each applicable sequence from the approved model project.
- Rename each cloned sequence using the Olson naming convention and the new project name.
- Replace all model-project references in the following:
    1. (Project Name) – ONLINE
    2. (Project Name) – ONLINE REALTOR
    3. (Project Name) – ONSITE
    4. HOMEBUYER IN ESCROW – (Project Name)

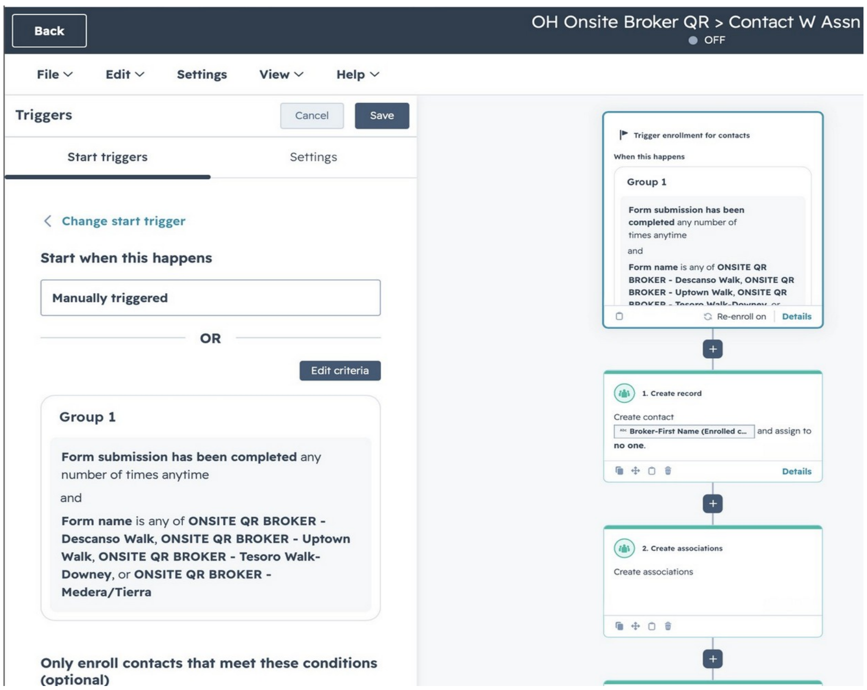
**Completion check:** All four project-specific sequences are correctly named and configured, with no remaining references to the model project unless intentionally shared.

## Step 7: Update the Onsite Broker QR workflow

**Workflow Name:** OH Onsite Broker QR > Contact W Assn - ALL PROJECTS

**Objective:** Add the new broker form and project logic to the shared workflow that creates and associates Realtor and prospect records.

- Add the new project's broker form submission to the existing enrollment trigger structure alongside the other Olson broker forms by editing the criteria.



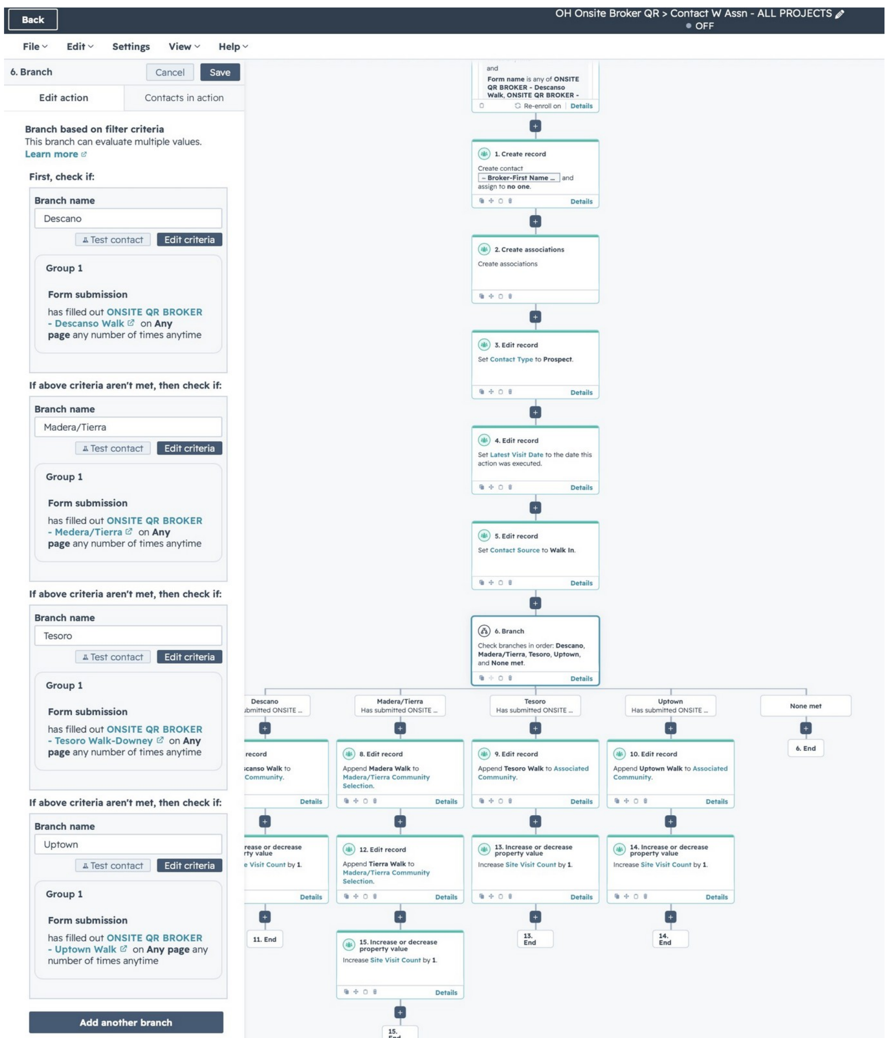

*HubSpot workflow enrollment triggers for Onsite Broker QR forms.*

- Add another branch to the bottom project row for the new project.

| Action | Description |
|---|---|
| Form name | is any of ONSITE QR BROKER - Descanso Walk, ONSITE QR BROKER - Re-enroll on Details |
| 1. Create record | Create contact - Broker-First Name .. and assign to no one. |
| 2. Create associations | Create associations |
| 3. Edit record | Set Contact Type to Prospect. |
| 4. Edit record | Set Latest Visit Date to the date this action was executed. |
| 5. Edit record | Set Contact Source to Walk In. |
| 6. Branch | Check branches in order: Descano, Madera/Tierra, Tesoro, Uptown, and None met. |

| Action | Description |
|---|---|
| 7. Edit record (Descano) | Append Descano Walk to Associated Community. |
| 8. Edit record (Madera/Tierra) | Append Madera Walk to Madera/Tierra Community Selection. |
| 9. Edit record (Tesoro) | Append Tesoro Walk to Associated Community. |
| 10. Edit record (Uptown) | Append Uptown Walk to Associated Community. |
| 11. End | End |
| 12. Edit record | Append Tierra Walk to Madera/Tierra Community Selection. |
| 13. Increase or decrease property value | Increase Site Visit Count by 1. |
| 14. Increase or decrease property value | Increase Site Visit Count by 1. |
| 15. Increase or decrease property value | Increase Site Visit Count by 1. |

- Configure the branch to apply the correct Associated Communities value.




*Branch configuration — each project branch appends its Associated Community value.*

- Confirm the workflow creates or updates the Realtor contact using the Realtor email address.

- **NOTE:** There is a 1 minute delay on this workflow for Prospect > Realtor community association.
- Confirm the prospect and Realtor are associated with the correct association labels.
- Review the workflow for any notes, phone mapping, contact-type or other project-specific actions that require the new branch.

> **Completion check:** A broker-form test creates or updates both contacts, associates them correctly and records the new project on the prospect.

## Step 8: Update all other project specific workflows

1. (Project Name) - ONSITE QR CODE
2. (Project Name) - ONLINE REG-DELAYED FOLLOW UP
3. (Project Name) - ONLINE REG-BUSINESS HOURS

**Objective:** Ensure the new project has the associated project workflows updated.

- Clone a past project workflow with the new naming convention.
- Update the Record Owner in all branches.
- Update Associated Communities in all branches.
- Update both the “Realtor” and “Prospect” sequences in the bottom of each branch.

> **Completion check:** All three project-specific workflows are correctly named and configured, with the correct record owner, associated community, and Realtor and Prospect sequences in every applicable branch. No unintended references to the cloned project remain.

## Step 9: Review lists, reporting and contact-record visibility

**Objective:** Ensure the new project appears anywhere Olson users monitor or filter registrations.

- Add the new project to any active lists, saved views, dashboards, reports or filters that use a fixed community list.
- Confirm the Associated Communities property appears on the appropriate contact cards.
- Verify the Realtor record displays the expected associated clients and community information.
- Confirm project naming is consistent in exports and reporting results.

**Completion check:** A test contact can be found through the expected lists, filters and reports, and the required information is visible on the contact record.

## Step 10: Complete end-to-end testing

**Objective:** Validate every registration path before allowing live enrollment.

- Submit the onsite prospect form using a new test prospect.
- Submit the broker form using a new prospect and a new Realtor.
- Submit the broker form again using a new prospect and an existing Realtor.
- If relevant, test an existing prospect submission to confirm update behavior and avoid unintended duplicates.
- Verify contact properties, contact type, phone fields, consent values, ownership, emails, associations, notes and Associated Communities.
- Inspect workflow history for skipped actions, enrollment failures, duplicate records or errors.
- Confirm the Realtor's existing communities are preserved when the new project is appended.

**Completion check:** Every test scenario passes and the test contact names, results and evidence are recorded.

## Step 11: Activate and document the project

**Objective:** Move the tested configuration into production with a clear audit trail.

- Obtain final approval from the authorized Olson contact.
- Turn on new workflows and publish approved updates to shared workflows.
- Confirm final form URLs and QR codes point to the published project forms.
- Complete the launch checklist and record the activation date, approver and person responsible.
- Add the project to the master setup tracker and attach or link the relevant test evidence.
- Monitor the first live submissions and resolve any unexpected routing or enrollment issues.

**Completion check:** The project is live, documented and producing correct records from the final QR destinations.

## 6. Final Launch Checklist

| | Verification item | Notes / evidence |
|---|---|---|
| ☐ | Approved project name and internal value are documented. | |
| ☐ | Associated Communities includes the new project. | |
| ☐ | Onsite prospect form is published and mapped correctly. | |
| ☐ | Onsite broker/Realtor form is published and mapped correctly. | |
| ☐ | Hidden project fields contain the correct value. | |
| ☐ | Salesperson assignment and notifications are correct. | |
| ☐ | Thank You for Registering emails are approved and selected in the correct workflows. | |
| ☐ | Project-specific workflows are cloned, renamed and free of unintended model-project references. | |
| ☐ | Onsite Broker QR workflow trigger includes the new broker form. | |
| ☐ | Onsite Broker QR workflow includes the new project branch. | |
| ☐ | Secondary Realtor Associated Communities workflow includes the new project. | |
| ☐ | New Realtor/new prospect test passes. | |
| ☐ | Existing Realtor/new prospect test passes without overwriting prior communities. | |
| ☐ | Onsite prospect test passes. | |
| ☐ | Lists, reports, views and contact cards display the new project correctly. | |
| ☐ | Final form URLs and QR codes are verified. | |
| ☐ | Activation approval, date and test evidence are recorded. | |

## 7. Troubleshooting and Rollback

- If an incorrect workflow was activated, turn off new enrollment before editing. Preserve workflow history for diagnosis.
- If a community value overwrites existing Realtor communities, stop the secondary workflow and correct the action from replace to append before retesting.

- If a contact does not enroll, verify the published form used in the test exactly matches the form referenced in the workflow trigger.
- If a project does not display on a contact record, confirm both the property option and the workflow action use the same approved value.

## 8. Setup Record

| Field | Project-specific entry |
|---|---|
| **Official project name** | |
| **Associated Communities internal value** | |
| **Model project used for cloning** | |
| **Assigned salesperson/team** | |
| **Onsite prospect form** | |
| **Broker/Realtor form** | |
| **Prospect thank-you email** | |
| **Broker/Realtor thank-you email** | |
| **Project workflows** | |
| **Shared workflows updated** | |
| **Test contacts** | |
| **Approved by** | |
| **Activation date** | |