

AVIDLY | APAC

Construction Industry Case Study

How we solve for Building, Property & Real Estate



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Our Expertise

Building Growth for Construction, Property, and Real Estate Brands



Across Australia and New Zealand, construction, property, and building materials businesses face a familiar challenge: strong reputations offline, complex sales cycles, fragmented marketing activity, and growing pressure to generate measurable demand.

At Avidly APAC, we've supported a broad mix of companies in this space, from large construction firms and property developers to home builders and product suppliers, helping them strengthen their digital foundations, improve marketing operations, and create more connected customer journeys.

What unites these organisations is the complexity of how they grow. Many serve multiple audiences at once, homeowners, developers, specifiers, contractors, commercial buyers, and channel partners, while managing long decision cycles and high-value purchases.

The Challenge

For businesses in this sector, growth rarely comes from a single campaign. It depends on having the right systems, content, automation, and reporting in place to support a longer and more consultative buying journey.

Building growth in the construction and property sectors requires overcoming a unique set of high-friction challenges that span the entire lifecycle from initial lead to build completion. Organisations in this industry face the following hurdles:

Marketing Challenges

- **Qualified Enquiry Conversion:** Difficulty turning initial website traffic into high-value, qualified enquiries.
- **Lead Distribution Complexity:** Managing and routing leads across multiple regions, franchises, brands, service lines, and third-party listing websites.
- **Revenue Attribution:** A lack of visibility into which specific marketing channels and campaigns are actually driving commercial revenue.
- **Digital Modernisation vs. Trust:** The challenge of modernising a digital experience while maintaining the trust built through long-standing offline brand reputations.

Sales & Service Challenges

- **Siloed Processes and Knowledge:** Critical operational knowledge and process "IP" is often held by only a few power users, creating significant risk and bottlenecks.
- **Funnel Alignment:** Misalignment between sales, marketing, and customer service teams, often lacking a clear funnel with agreed-upon handoffs.
- **Fragmented Customer Data:** Disconnected tech stacks lead to a lack of a single source of truth for customer and project information, resulting in missed opportunities and rework.
- **Customer Lifecycle Tracking:** Difficulty tracking over long (10+ year) lifecycles, making long-term engagement hit and miss, leading to lost relationships and future opportunities.



Operational & Technological Challenges

- **Tangled Legacy Systems:** Many firms are burdened by a decade's worth of over-engineered, "spaghetti-tangled" legacy tech spread across various business units.
- **High Administrative Friction:** Teams spend excessive time reconciling information manually rather than acting on it, such as re-entering sign-up data from show homes.
- **Specialist Dependency:** A heavy reliance on external developers and technical specialists just to maintain and manage basic platform functions.
- **Low Project Visibility:** Critical project data is often trapped in silos, preventing real-time updates and hindering the ability to respond to market changes quickly.
- **Document Management Hurdles:** Large requirements for managing and generating complex documents like contracts, which are often prone to manual errors.

For brands selling complex products or services, such as commercial construction, home building, building supplies, or property itself, the need for clarity and consistency is even greater.

The Industry Work We've Done

The following examples demonstrate how we have helped construction, property, and building brands across Australia and New Zealand (sometimes operating globally) to overcome technical debt and fragmented operations to build scalable growth engines.

Critical Insight:

For high-consideration industries, the most significant impact comes from moving beyond basic lead capture. Our focus is on building a "single source of truth" ecosystem that automates manual admin, resolves information silos, and provides real-time visibility into the entire project lifecycle.

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The Global Property & Investment Group

The Goal

Consolidate a "tangled" legacy tech stack across eight global regions into a unified HubSpot ecosystem within seven months.

The Challenge

Siloed data across dozens of single-purpose platforms and a heavy dependence on specialists to maintain basic CRM functions.

The Solution & Impact:

We architected a unified HubSpot ecosystem integrated with core industry data sources to streamline the property lifecycle. Key deliverables included:

- **Custom Agent Portal:** A browser-based hub for internal and external teams to manage property stock, reservations, and collateral.
- **iPad Inspection App:** An offline-capable tool for "Hard Hat Tours," defect resolution, and handovers that syncs directly to the Service Hub.
- **Global Integration:** An API integration with Colliers' Particle platform to sync leads and deal progress in near real-time.

78%

Reduction in Total Cost of Ownership (TCO)

79%

CRM licensing costs

82%

Decrease in operational maintenance

91%

Staff reporting improved productivity and CX

The digital transformation for this global leader focused on massive operational consolidation, successfully moving from over 12 disparate legacy platforms into a unified HubSpot ecosystem within just seven months. This strategic shift delivered profound financial and efficiency gains, including a 78% reduction in Total Cost of Ownership (TCO), a 79% reduction in CRM licensing costs, and a 82% decrease in operational maintenance. The impact extended to team performance, with 91% of staff reporting improved productivity and customer experience post-implementation.

Digital Transformation for a Nationwide Real Estate Group

The Goal

Establish a scalable, enterprise-grade digital platform to unify the experience for customers, franchises, and agents while optimising existing technology investments.

The Challenge

Managing fragmented operations across legacy systems like Marketo and Salesforce, which created manual administrative overhead and lacked real-time data visibility across 21 franchises.

The Solution & Impact:

We architected a unified HubSpot ecosystem integrated with core industry data sources to streamline the property lifecycle. Key deliverables included:

- **Agent & Client Portal:** A centralised portal providing agents and clients with real-time access to activity, listings, and enquiries via Azure SAML SSO.
- **Property Listings Sync:** A sophisticated integration engine utilising "Integration Glue" to synchronise property data across the website and major third-party listing platforms.
- **HubSpot CMS & CRM Integration:** Transitioned marketing assets to a modern CMS to enable personalised customer journeys and 360-degree visibility into listing performance and buyer sentiment.

This digital transformation replaced manual administrative overhead with a high-performance environment engineered to support complex real estate operations. The solution introduced advanced features such as automated listing analytics, custom event management for auctions and open homes, and secure document management using HubSpot's file system. By centralising property data, the platform provided real-time visibility into complex records, ensuring brand consistency and enhancing the overall agent and customer experience.



A National Residential Home Builder

The Goal

Establish a "Single View of Customer" and a centralised internal design repository for over 150–180 internal users.

The Challenge

A legacy Plan Portal that was unstable, unsupported, and lacked a secure repository for CAD files and house plan variations.

The Solution & Impact:

We built a stable, national framework within HubSpot. Key deliverables included:

- **Internal Plan Portal:** A secure web app allowing sales consultants and designers to access the full suite of house designs with advanced filtering (e.g., by floor area or garage orientation).
- **Automated Brochure Generation:** Integration with DocMergy to auto-generate customised PDF brochures directly from CRM data.
- **Pre-Construction Framework:** A standardised process including a "Tender Matrix" and core gates to ensure consistent KPI reporting across franchises.

671%

Increase in
project-related revenue

100%

brand consistency across
regional franchises

This project established a high-trust national framework for approximately 180 users, replacing unstable legacy systems with a secure HubSpot-based "Single View of Customer" and internal plan repository. The three-year digital roadmap has driven explosive growth, resulting in a 671% increase in project-related revenue. Beyond the financials, the solution achieved 100% brand consistency across regional franchises by automating the generation of customised brochures and replacing manual, paper-based tracking with real-time digital dashboards.

A Leading Build-to-Rent Property Developer

The Goal

Build a tailored HubSpot environment to support high-volume rental applications and a "Search to Sleep" lease approval engine.

The Challenge

Highly manual tenancy operations that created bottlenecks and security concerns regarding sensitive tenant data.

The Solution & Impact:

We implemented end-to-end tenancy automation. Key deliverables included:

- **Automated Lease Approval Engine:** A risk scoring system that automatically returns "Approved," "Declined," or "Referred" outcomes based on lead scoring.
- **Online Application Portal:** A specialised portal designed to securely handle sensitive tenant documents.
- **Financial & PII Security:** Integrations with Equifax for affordability checks and Skyflow as a secure vault for Personally Identifiable Information (PII).

5+ Business Units in One HubSpot Account



This digital transformation focused on engineering an automated, end-to-end lease approval engine designed to eliminate manual bottlenecks and standardise criteria across a diverse property portfolio. By implementing a non-discriminatory risk scoring system integrated with Equifax for automated affordability checks and Skyflow for secure PII storage, the solution delivered faster, transparent outcomes while maintaining strict data privacy compliance outside of HubSpot. The modernisation project involved building a tailored HubSpot environment to support complex data partitioning for 5+ business units.



The Commercial Real Estate & Investment Firm

The Goal

Replace a fragmented tech stack (including InsightCRM and Mailchimp) with a multi-channel platform to support tenant engagement.

The Challenge

Over 20,000 duplicate or "dirty" contact records and a lack of centralised tracking for lease expiries.

The Solution & Impact:

We consolidated regional sites into a single manageable CMS environment. Key deliverables include

- **A Custom Portal:** A bespoke portal (achieving an 8.8 average CSAT score) for enhanced tenant engagement.
- **Custom CMS Module Ecosystem:** A set of dynamic, "drag-and-drop" modules allowing non-technical staff to manage website content autonomously.
- **Tenancy Pipelines:** Specialised HubSpot pipelines and custom objects built to manage lease expiries and conveyancing.

This digital transformation centred on consolidating a fragmented legacy tech stack into a unified HubSpot environment, resulting in significant improvements to both data quality and tenant engagement. A critical achievement of this project was the remediation of over 20,000 "dirty" or duplicate contact records during the migration from InsightCRM and Mailchimp, ensuring a high-integrity database for future marketing. The hallmark of the solution was the Custom Portal, which achieved an exceptional average CSAT score of 8.8 by providing a bespoke experience for tenant interactions. Operationally, the project eliminated developer dependency by implementing a custom "drag-and-drop" CMS module ecosystem, empowering non-technical staff to manage content autonomously across multiple regional sites. This user-centric approach was grounded in an extensive Information Architecture audit involving 40-50 stakeholders to ensure the new digital ecosystem was perfectly aligned with complex tenant and investor journeys.

A Multi-Brand Construction, Supply and Property Development Group

The Goal

Centralise customer and project data to create a 360-degree view and streamline tendering and sales processes.

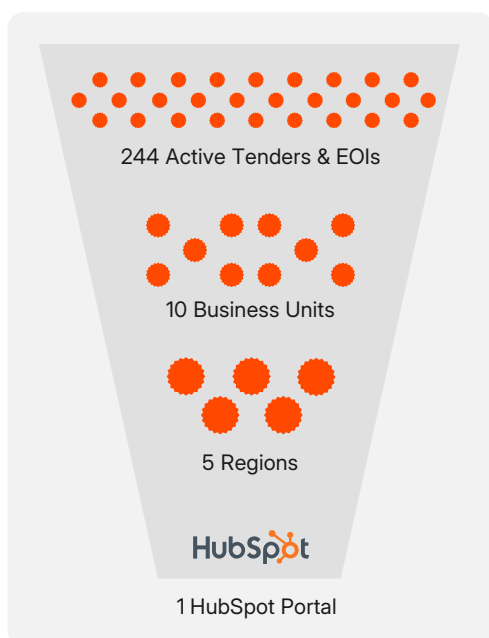
The Challenge

Operational gaps and communication friction between tendering and operations teams due to siloed data.

The Solution & Impact:

We engineered a centralised information hub. Key deliverables included:

- **Bespoke Customer Portals:** Fully customised self-service portals with tailored UX/UI for partner and client engagement.
- **Enterprise Knowledge Base:** A centralised repository for prospects and internal teams to access technical data.
- **Custom Subscription Portal:** A dedicated management system for partner communications and reordering.



This digital transformation was a high-stakes centralisation project designed to bridge operational gaps across more than 10 business units, supporting an ambitious target of \$1bn in total turnover by FY26. The implementation delivered a "360-degree view" of project data and digitised the group to manage approximately 244 active tenders and EOIs across five regions, providing real-time visibility that was previously locked in fragmented spreadsheets. The solution successfully resolved long-standing communication friction between tendering and operations teams while establishing bespoke self-service portals and an automated feedback engine to maintain service excellence during rapid scaling.

A Major Australian Residential & Wholesale Home Builder

The Goal

Develop a white-labeled digital ecosystem to standardise internal processes and create an experience-led journey for agents and homebuyers.

The Challenge

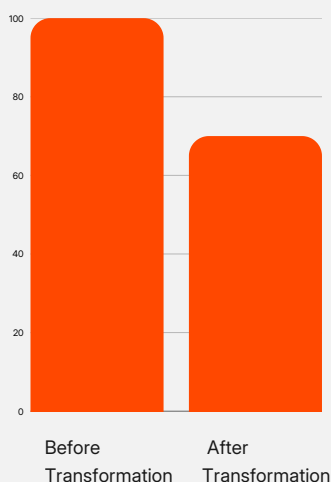
Manual admin overload and a lack of visibility into the build journey for both staff and customers.

The Solution & Impact:

We integrated Simonds' internal ERP (Framework) with HubSpot. Key deliverables included:

- **Homebuyer Customer Portal:** A secure web app featuring project dashboards, calendar timelines, and automated build status updates.
- **Automated Contract Generation:** Functionality for agents to initiate contract requests and digitally sign via DocuSign and DocMergy.

Operational Overhead



This digital transformation replaced manual administrative overhead with an enterprise-grade ecosystem integrated directly with an internal ERP system. The solution introduced automated contract generation and a high-scale digital environment engineered to support up to 50,000 users per project, underpinned by a substantial professional services investment across two key deliverables: a white-labeled Agent Portal and a Homebuyer Customer Portal. By centralising project data and building timelines, the platform successfully provided real-time visibility into approximately 200,000 records across core CRM objects, ensuring brand consistency and secure file management utilising UUIDs to protect sensitive documentation. This transformation targeted a 30% reduction in operational overhead while providing leadership with complete visibility of project milestones, cost impacts, and customer sentiment.

The Regional Provider of Transportable & Residential Homes

The Goal

Replace a decade-old digital infrastructure with a modern, mobile-optimised HubSpot ecosystem.

The Challenge

Heavy developer dependency for minor updates and key commercial content being "buried" within a residential site structure.

The Solution & Impact:

We rebuilt the entire digital ecosystem on HubSpot Content Hub. Key deliverables included:

- **Educational Microsite:** A standalone site dedicated to commercial education projects with interactive classroom specifications.
- **Dynamic Listings Engine:** A system that leverages the CMS to display pre-built homes, synced across the website and third-party marketplaces like Trade Me.
- **Branch Finder:** An intelligent tool featuring heatmap functionality to visually display branch coverage.

A primary result was the elimination of technical debt by migrating complex sales processes from the legacy App Active system into a unified HubSpot environment, effectively removing developer dependency and granting the marketing team full autonomy over content updates. Operationally, the project eliminated 100% of manual listing updates through a dynamic engine that automatically syncs pre-built homes to NZ's leading third-party property sites, Trade Me and One Roof. These new digital foundations, which include advanced tools like a location heatmap, are strategically engineered to scale capacity toward 800 site starts per year while providing leadership with a 360-degree view of the entire customer journey.

trademe 



HubSpot 



 OneRoof

Our Approach

Our work with construction, property, and building materials customers is centred on building a more connected growth engine inside HubSpot. Depending on the business, that can include:

- HubSpot implementation and optimisation
- Lifecycle and lead management improvements
- Marketing automation
- Campaign and channel optimisation
- Reporting and work-in-progress visibility
- Account management and ongoing strategic support
- Event & Event Management
- Listing & Enquiry Management
- Agent & Customer Portals
- Document Generation

In our client base, many in this segment utilise retained services such as account management, monthly WIPs, and flexi-support, reinforcing that this is not one-size-fits-all delivery but ongoing, practical growth support aligned to business needs.





The Impact & Why It Matters

While each client's goals are different, the broader pattern is clear: businesses in this sector benefit when marketing, sales, and operational visibility are brought together in one system. That means helping teams respond faster to demand, nurture longer buying journeys effectively, and create a stronger connection between digital activity and commercial outcomes.

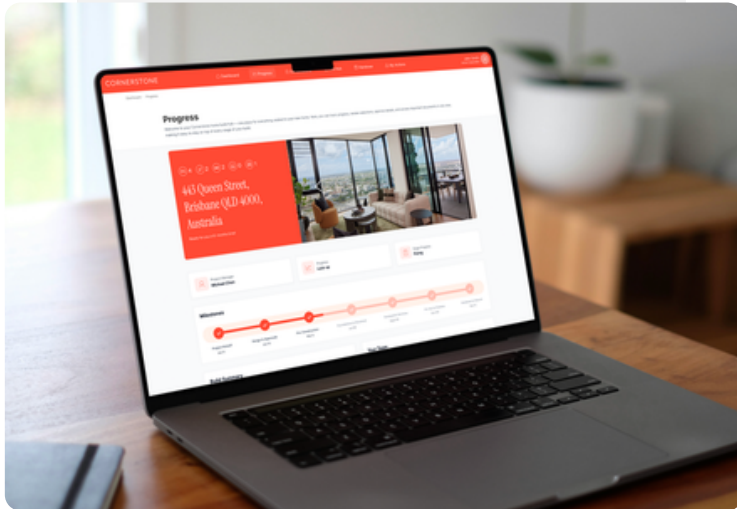
Construction and property businesses don't just need leads; they need the right leads and systems that can support growth over time. Whether the end customer is a homeowner, a commercial buyer, or a

developer, the experience has to feel connected from the first interaction through to conversion.

From residential builders and property groups to specialist suppliers and large construction organisations, we've seen how the right HubSpot strategy can help industry leaders modernise their approach without losing sight of the practical realities of their market. At Avidly APAC, we help construction, property, and building materials brands create the systems, visibility, and momentum needed to drive sustainable growth.

The Solutions We Commonly Use

Across these projects, a handful of custom solutions recur because they solve the structural problems that arise again and again in property and construction businesses.

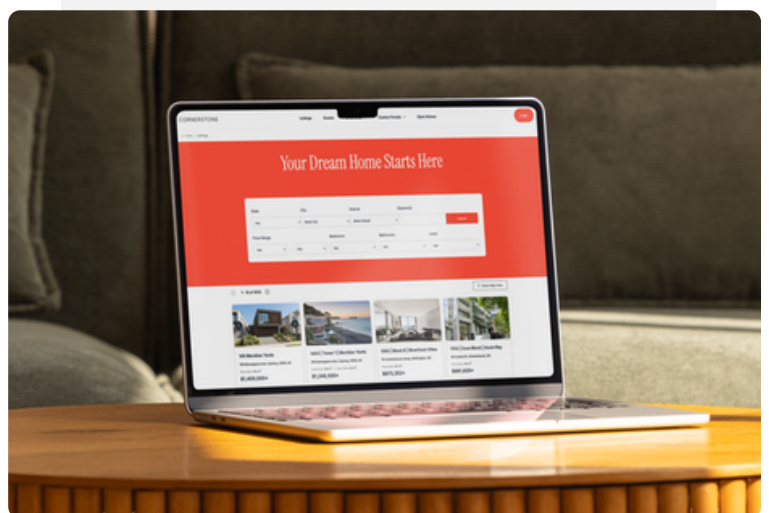


Custom Portals

Give external parties, agents, tenants, buyers, or vendors a secure, branded window into your CRM data without exposing your core system. Role-based access means each user sees only what's relevant to them, while your team retains full visibility and control. For agent networks, this means self-service access to listings, collateral, reservations, and deal status. For tenants or homebuyers, it means a dedicated portal for applications, documents, and milestone tracking.

Listings Enquiry Management

solves the operational repetition of managing property stock across multiple platforms. Built directly within HubSpot, it creates a single point of control, updates a listing once, and it's reflected across your website, agent portal, and connected third-party marketplaces automatically. Inbound enquiries from external portals are pulled back into HubSpot with source attribution intact, feeding directly into your sales pipeline.





Events Management

makes project launches, showhome openings, and buyer evenings a native part of your HubSpot CRM, no third-party platforms, no manual data exports. Registrations, check-ins, automated communications, and post-event follow-up sequences all live in the same system as your contacts and deals, so nothing falls through the gap between who attended and what happens next.

Document Generation

eliminates the manual overhead of producing contracts, reservation agreements, proposals, and handover packs. Templates are managed in Word or Google Docs, triggered automatically by HubSpot workflows, and can be routed through DocuSign for digital signing, all without leaving the platform.



Engage with the Experts

The projects in this case study didn't happen because these businesses had the biggest budgets or the most time. They happened because the right questions were asked early, about what the business actually needed, where the friction was, and what a connected system could look like in practice.

Whether you're managing a fragmented tech stack, running manual processes that have outgrown your team, or about to scale and wanting to get the foundations right before you do, that's exactly where we do our best work.

At Avidly APAC, our diverse team brings expertise across every area of the implementation process, from project management, CRM and integrations, all the way to marketing and custom solutions. We have people who know not only how to technically execute, but also how to bring your people along the journey. As HubSpot's 6x APAC Partner of the Year, we've helped over 400 businesses achieve stronger and more efficient ways of working, with many of those companies being in the property and construction industry.

We work with businesses that understand the value a well-built CRM can bring, and who are ready to commit to the changes needed to get ahead. If anything in this document reflects where your business is right now, we'd love to have a conversation.

**Are you ready to make
this your competitive
advantage?**

Let's talk!