AVIDLY | APAC

Building the Ultimate CRM Tech Stack for Construction & Property Businesses

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Marketing and CRM Technology

Where are construction companies getting it wrong?

Do you find your business bleeding cash for tangled legacy technology systems that are made up of dozens of single-purpose platforms that were stitched together over time?

Symptoms of this may include:

- Slow to respond to market or launch initiatives
- Difficulty monitoring and acting on data
- Difficulty responding to competitor's activity
- Struggling to deliver a consistently satisfying customer experience
- Dependence on developers and specialists to maintain and manage the platform
- Lack of empowerment and decision making across different business units

You're not alone. We've seen many construction companies dealing with complex, time-consuming and over engineered technology that causes siloed data, platforms and processes within their business. They've got no visibility across their organisations, and the consistent disruption to their everyday operational efficiency has become so great that they can no longer justify the eye-watering overheads.

Now they're looking for a better way.

Where to start

Understanding the basics of tech stack consolidation through the power of CRM

If you're evaluating the effectiveness of your tech stack, it's likely that you'll have heard the phrase "tech stack consolidation". This is referring to the process of streamlining your processes and optimising operations — usually with a focus on your technical and IT infrastructure.

What does that look like practically? Oftentimes it reflects the 'less is more' approach. Finding the most effective matchup of tools, platforms and processes thataregoing toremovefriction,increase efficiency, and enhance your overall ability to manage your data and operations.

The best way to achieve this is by putting a robust CRM in the centre, and building your tech stack around it. By doing this, you create a tech stack that is connected, giving you a unified view of your operations, instead of the typical disjointed patchwork set up.

To begin this process businesses should:

Take inventory

What tools, platforms and integrations are you currently using? Outline the components, the purpose, the cost (both software & people) and usage metrics for each.

Define your goals and objectives

What are you trying to achieve with the consolidated tech stack?

Identify redundancies and gaps

Are there overlapping functionalities between your platforms? And what's missing from your current platforms?

Choosing the right platform

When choosing the right platform for your business, it can be tempting to dive straight in and start looking at options. This would be a mistake. There are many options available, with different features, tools and capabilities to consider. If you failed to do the proper preparation, you would likely become overwhelmed and put off by the whole experience.

- That's why the first step to choosing the right platform is defining your goals. Without this, you have no starting line.

Avoid launching straight into a list of requirements. You should figure out what you want the experience to be, and then work backwards from there to decide what's needed to deliver that experience. The stakeholders involved in the decision making process need to have a clear, aligned understanding of what digital "utopia" looks like for your business. I.E:

- What does the immediate experience you want to deliver look like?
- What does that experience look like in the future as your business changes and scales?

This understanding will act as a guidepost for deciding what you do and don't need in your platform.

Now you can start:

Identifying the key features and capabilities you need in a platform.

Using a prioritisation matrix to assess the overall impact of your needs as outlined above. Note: Your findings here may cause you to reevaluate and redefine your platform needs.

Looking at different tools to see how they fare against your needs. When you reach this stage, you should be asking, is it more important that the system reflects how you operate or can you be flexible enough to support the system?

Key considerations for marketing

- Lead generation through downloading brochures, managing showhomes and apartment viewings

- Being able to publish listings to your own website as well as other real estate or project websites (realestate.com.au / domain.com.au etc / allhomes.com.au)

- Centralised management of listings

- Managing multiple brands - assuming each of your construction projects can have a unique brand identity, you will need to consider

- How will the platform allow you to manage a multitude of uniquely branded email templates?

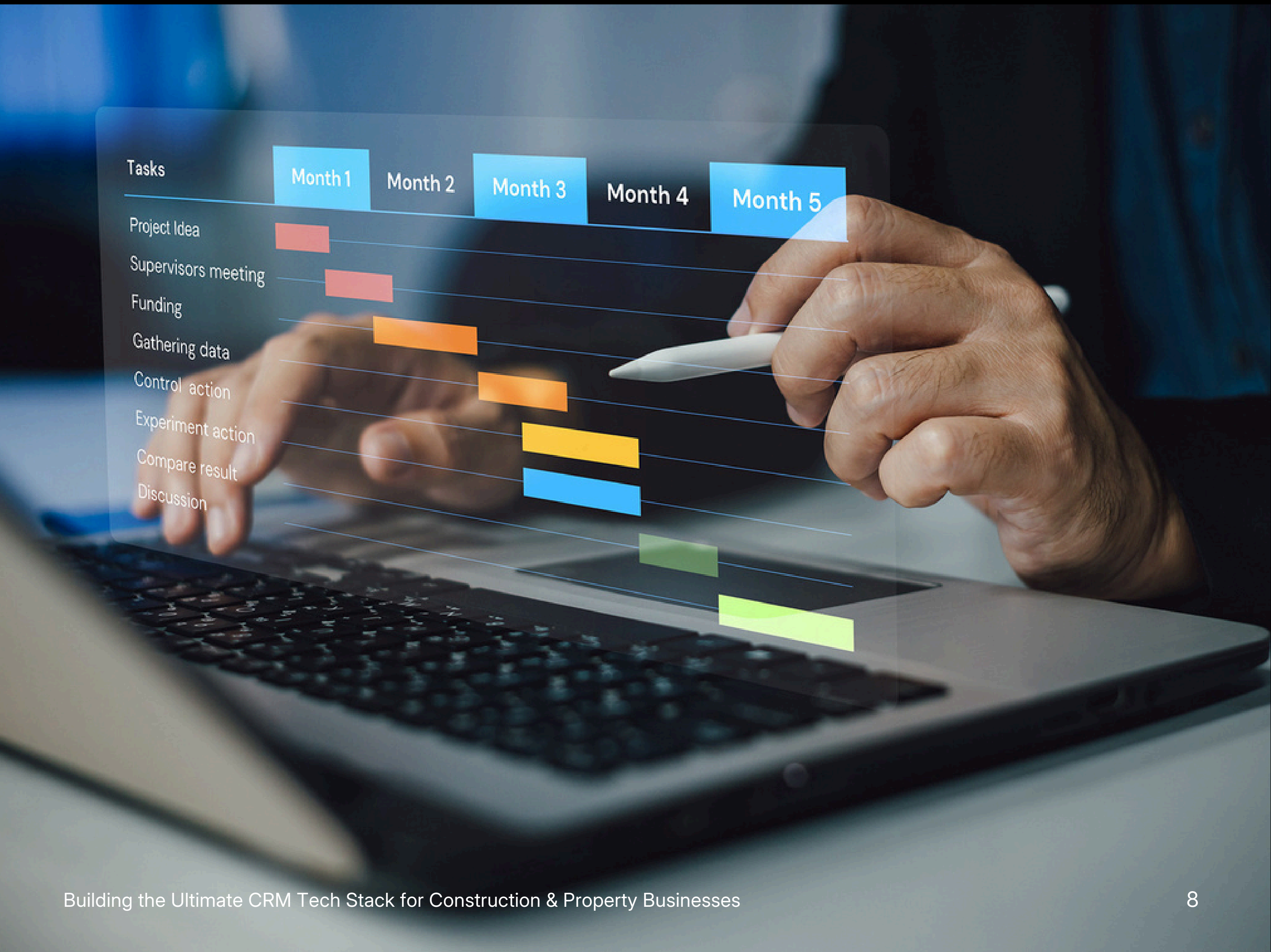
- Will the marketing platform support connection of multiple brand domains (where your projects have their own individual sites)?

- Will it support the connection of multiple social and advertising accounts?

- Does it allow you to create multiple page templates and 'brand kits' so that those working on specific projects have the right brand assets and options available to them (and it isn't too easy for them to go off-brand)?

Key considerations for project management

- Integrations with your build project management software to capture project status, progress and any other key insights to support reporting, segmentation, general customer service and automation of communications
- Automating key communications to buyers and stakeholders at various project milestones
- Getting end customer input on their build, e.g. finishings, colour palettes
- Managing inspections and the handover process
- Managing contractors and tradies
- Surfacing key milestones and required actions to the end customer
- Managing collaboration with the end customer
- Surfacing key information and documentation, e.g. building and resource consents, plans, designs, financials, etc, to end customers and stakeholders



Key considerations for sales

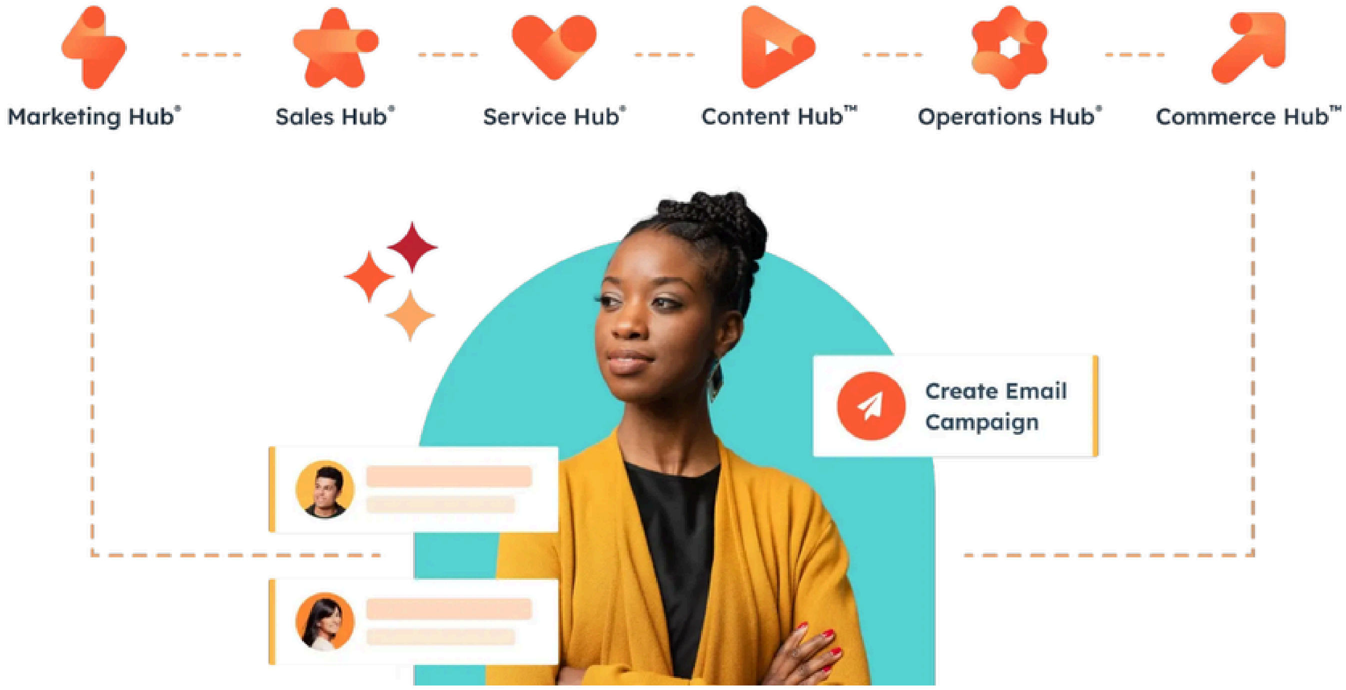
- Creating the appropriate CRM interfaces for 'in-field' sales activity
- Providing insight on client/lead activity to the sales team so they can spend time working with the opportunities that have the highest chance of closing
- Displaying sales effort metrics and aligning sales communications
- Integrating other SaaS systems so that the CRM holds all the data required to enable an effective sales process
- Managing and streamlining the sales process through automating contracts and facilitating deposit payments
- Managing and streamlining the post sale process

Key considerations for customer service

- Managing enquiries from various channels
- Defect management
- Maintenance requests
- Warranty claims
- Self-serve application management
- Credit Checks & Legal Approvals
- NPS & Voice of Customer

Key considerations for reporting

- Customising the reporting templates to suit different project requirements
- Integrating with project management tools to streamline data sharing and reporting
- Can you get real-time data updates for accurate reporting on project progress?
- Does the data architecture make it practical to report on the marketing performance of individual projects?
- Can you get mobile accessibility for on-the-go reporting and data input?
- Prioritise customisable dashboards for a snapshot view of key project metrics
- Are there strong data security features that safeguard sensitive project information and ensure compliance?
- Are your platforms ready to scale and accommodate future growth and evolving reporting requirements?



The platform

Why opt for HubSpot?

- HubSpot has done more than most to blow up an age-old market perception that a software with a simple interface for the user means it can't address the complexities of a larger business. And most construction businesses already know, through years of painful experience, that a hard to administer and maintain CRM only adds complexity and cost.

- With the common requirement for a unified platform that can support the breadth and complexity of multiple business units and teams, the list of viable options already becomes a short one.

- HubSpot is simple and intuitive enough for end- users to be confident and comfortable using it, while no business-critical needs are left unmet. The CRM's power and simplicity means that teams and individuals can execute tasks without constant specialist support, whether it's generating reports, managing pipelines, hosting events, or delivering campaigns.

[Find out more about HubSpot here]

Customising the Solution

With any business, regardless of its size, the selected CRM platform will always require add-ons and integrations to ensure it's a perfect fit for the business model and goals. This is where solution architecture comes into play, demanding extensive experience, collaboration, and commercial prowess. An "all of business" perspective that considers commercial implications, combined with an agile approach for adapting to yield optimal outcomes in a tight timeframe, is essential.

Consolidation & Integration

If you can consolidate, do so, and try to stay away from silver bullets. A silver bullet is a platform that seems to magically "do everything" you need it to do. On paper it sounds great. And yes it's true that every new platform integrated comes with its added complexities and risks, such as:

- Multiple user management
- Added manual intervention
- Added admin overheads
- Added costs
- Security and data risks

However, driving a platform to do too much with over customisation, poses its own (expensive) risks as well.

You'll need specialised resources to deliver the level of customisation needed for a silver bullet. Additionally, with that level of customisation, you also increase the likelihood that the platform will break with even the most minor of updates — meaning you'll need to rely on specialised resources again to fix it. There are also many upfront costs and usually steep learning curves involved with extensive customisation of a platform.

Doing your due diligence here becomes critical, especially for businesses who are working with a strict budget:

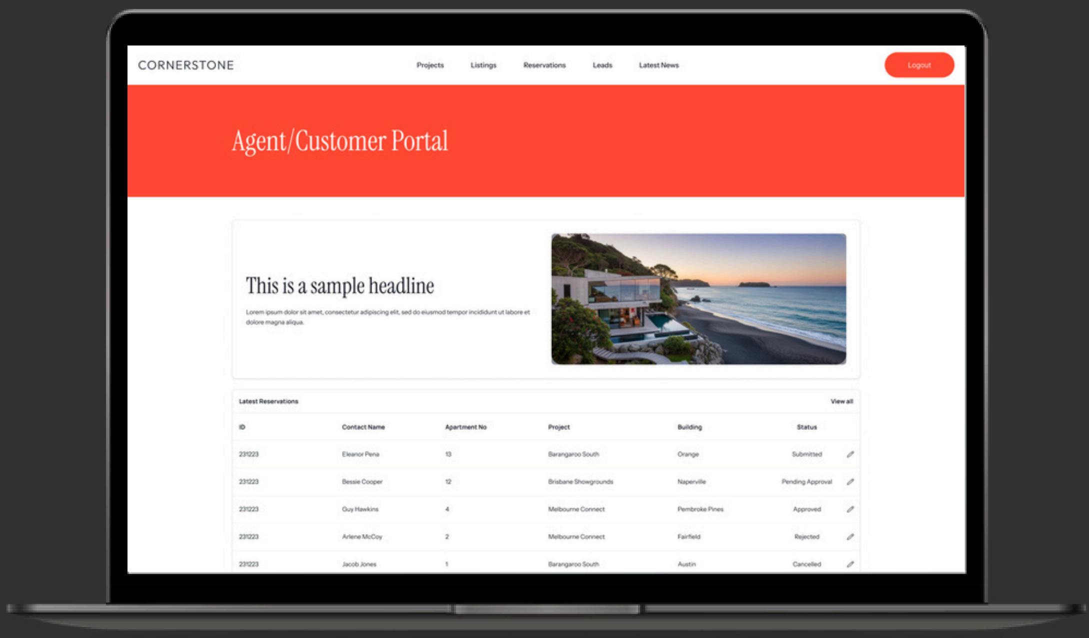
Aspects of Due Diligence

Understand your core activities

Understand how your process works end-to-end

Understand your key requirements for platforms, and then benchmark them for custom vs integration

Have levels of prioritisation. What is the value of that one little feature you think you need? If going without that feature saves your business $100,000 in licensing costs for another platform, is the feature still worth it? Or is there a work around that would be better?



Custom Solutions You Can Build Your CRM With

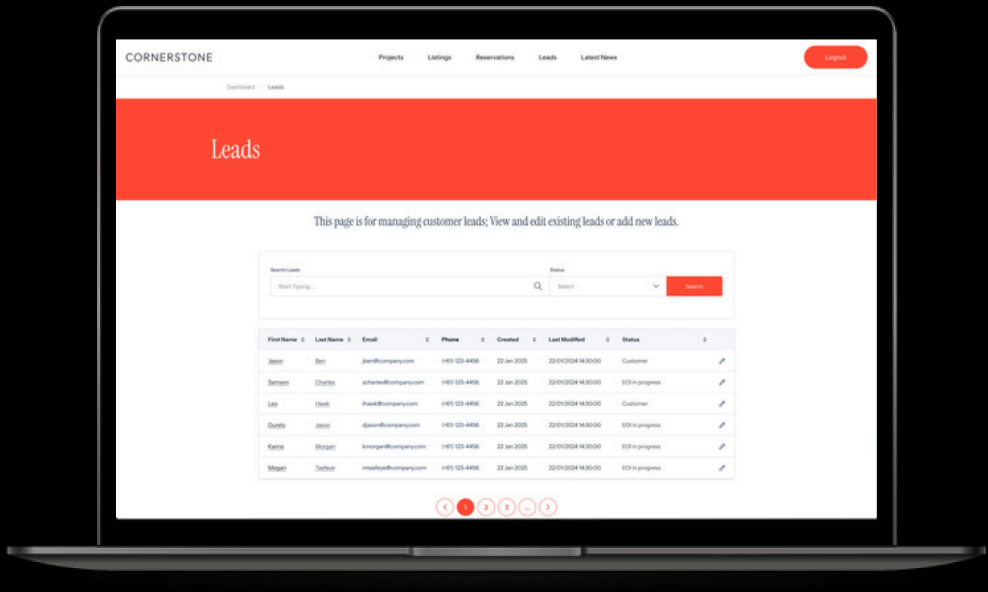
Custom Portals

Customs portals are a way to secure an online space, thoughtfully designed to suit your brand and expertly built to meet your unique business needs.

Many construction businesses are managing external agent relationships through disconnected systems, email threads for availability updates, phone calls to place reservations, and separate tools for contracts and collateral. The result is siloed data, duplicated effort, and an agent experience that reflects poorly on your brand. Your team lacks visibility, agents lack confidence, and deals slow down at every handover point.

HubSpot's CRM is built for your internal team. There is no native way to give external agents, partners, or customers a branded, role-based window into your data, without either exposing your entire system or resorting to manual workarounds that defeat the purpose of having a CRM in the first place.

Custom portals fill that gap. A secure, branded interface built on top of HubSpot CMS Enterprise and Membership functionality that gives third parties controlled access to exactly what they need, connected directly to your CRM, so every interaction is captured, and your team retains full visibility and control.



What it does

The portal provides third parties, agents, partners, customers, or vendors with secure login and role-based access to your CRM data, without touching your core system. Each user sees only what is relevant to them. Custom workflows and dashboards are built around what each user type actually needs to do, from placing reservations to downloading collateral to tracking deal status.

For construction businesses specifically, the Agent Portal is built on HubSpot CMS Enterprise and Membership functionality, integrated with your pricing system, document automation, and digital signing. It gives your agent network a fully white-labelled hub to work from, and gives your team complete visibility and control over everything that happens inside it.

In a scenario where the portal was created for third-party agents
The agents can:

- Log in, register, and reset passwords independently
- View properties assigned to them, register new leads and enquiries, and update lead status
- Download marketing collateral and receive notifications when it is updated
- View and update deal data
- Export lot allocations and deal status for reconciliation with their own systems
- Upload documents to specific lots and view signed contracts
- Add contacts without directly editing core CRM data
- Access the latest project news and contact support

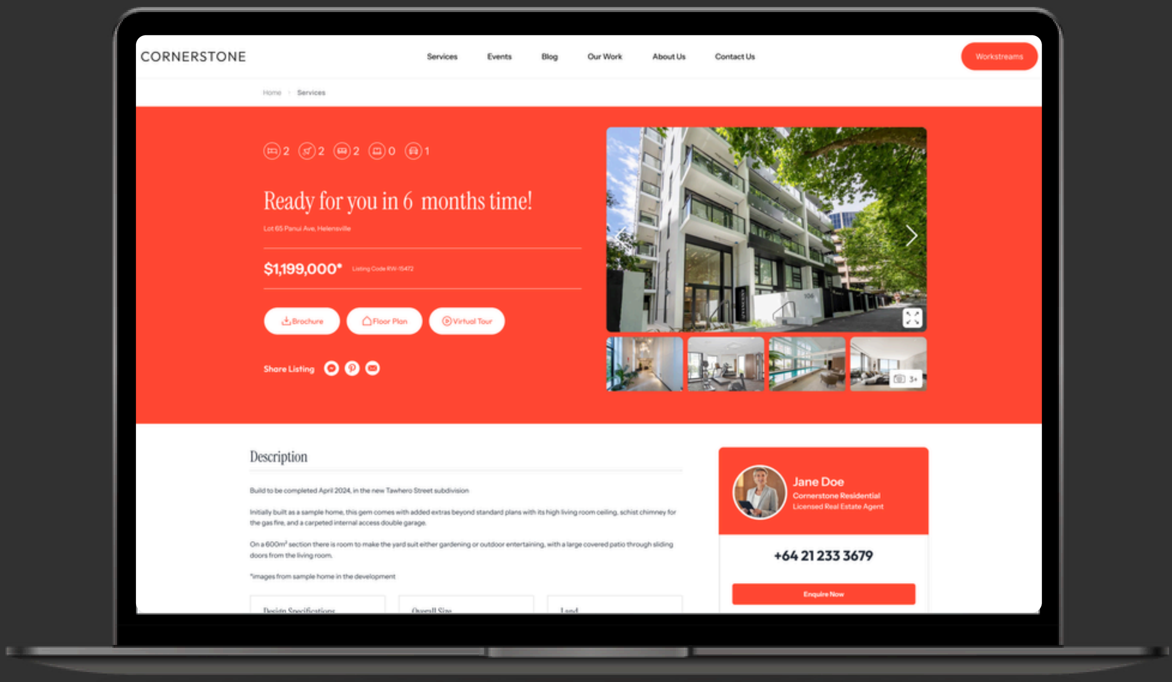
What your admin team can do:

- Approve new user requests and manage permissions
- Assign stock at the company level and create assets
- Create and manage projects, stages, and stock
- Update contract dates, deal records, and user profiles
- Report on agent activity and portal usage

Core capabilities across all portal types:

- Controlled, gated access with role-based permissions for different user groups
- Self-service functionality that reduces admin load without reducing service quality
- CRM-powered personalisation drawing on live HubSpot data for each user
- Centralised resources, communications, and workflows with real-time visibility
- Cross-functional collaboration between user groups, partners on deals, and agents on listings
- A branded experience that builds loyalty, trust, and competitive differentiation

Working closely with your internal champions through every stage, from site map and UX definition through wireframes, design, membership configuration, testing, training, and launch support, to deliver a portal that works for your users and your business from day one.



Listings Management

Managing property listings across multiple platforms is one of the most operationally repetitive tasks in a construction team. A price change, a new release, or a sold lot means updating your website, your project sites, your agent portal, and every third-party portal separately, manually, and with no guarantee of consistency. Enquiries come back through different channels with no clear attribution, leads get missed, and your team spends more time maintaining data than working on it. If your website is built on HubSpot, every one of those touch points is connected, one change, reflected everywhere, automatically.

HubSpot doesn't natively support listing management or publishing to external marketplaces. There is no built-in way to create structured property listings, publish them to third-party property portals, or route inbound enquiries from those portals back into your CRM automatically.

The Listings Management solution fills that gap. Built directly within HubSpot, it gives your team a single place to create, manage, and publish listings across every channel, so a change made once is reflected everywhere, and every enquiry that comes back is captured, attributed, and fed into your sales process automatically.

What it does

If your website runs on HubSpot, listing management becomes your single control point for every channel. Create or update a listing once, and it is reflected across your website, project sites, agent portal, and connected third-party marketplaces instantly no switching tools, no manual duplication, no inconsistencies.

Listings are created and managed entirely within HubSpot. Each listing supports a full asset set, image galleries with automated resizing, videos, floor plans, brochures, and descriptions, and publishes outward to your website, project sites, agent portal, and connected third-party marketplaces from one interface.

Portal integrations work in two directions. Listing details are pushed outward to connected third-party property portals, TradeMe and RealEstate.co.nz are examples, but any compatible platform can be integrated, keeping them current without manual updates. Enquiries are pulled back from external portals directly into HubSpot, with source attribution intact, feeding into your nurture workflows and sales pipeline automatically.

Key capabilities:

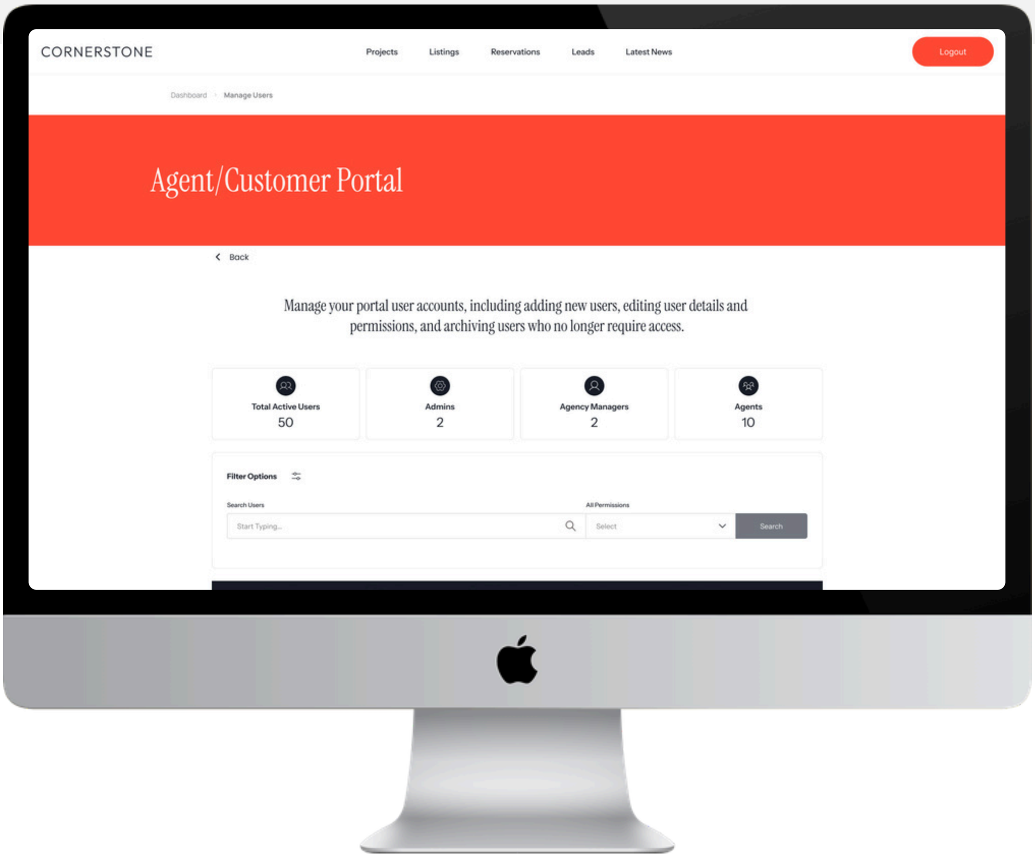
- Create, edit, and manage all listings from within HubSpot, no switching between platforms
- Automated image resizing and asset management
- Advanced search and filtering for buyers browsing your listings
- Dedicated listing pages with full media support, including image galleries, floor plans, and embedded video
- Buyers can save listings to favourites, rate and comment, create curated favourite lists, and share them with others
- Agent contact details and enquiry forms displayed per listing
- Related listings to keep buyers engaged across your projects
- Listing view, click, and enquiry stats tracked natively
- Push listing details to TradeMe and RealEstate.co.nz
- Pull inbound enquiries from RealEstate.com.au and Domain.com.au back into HubSpot

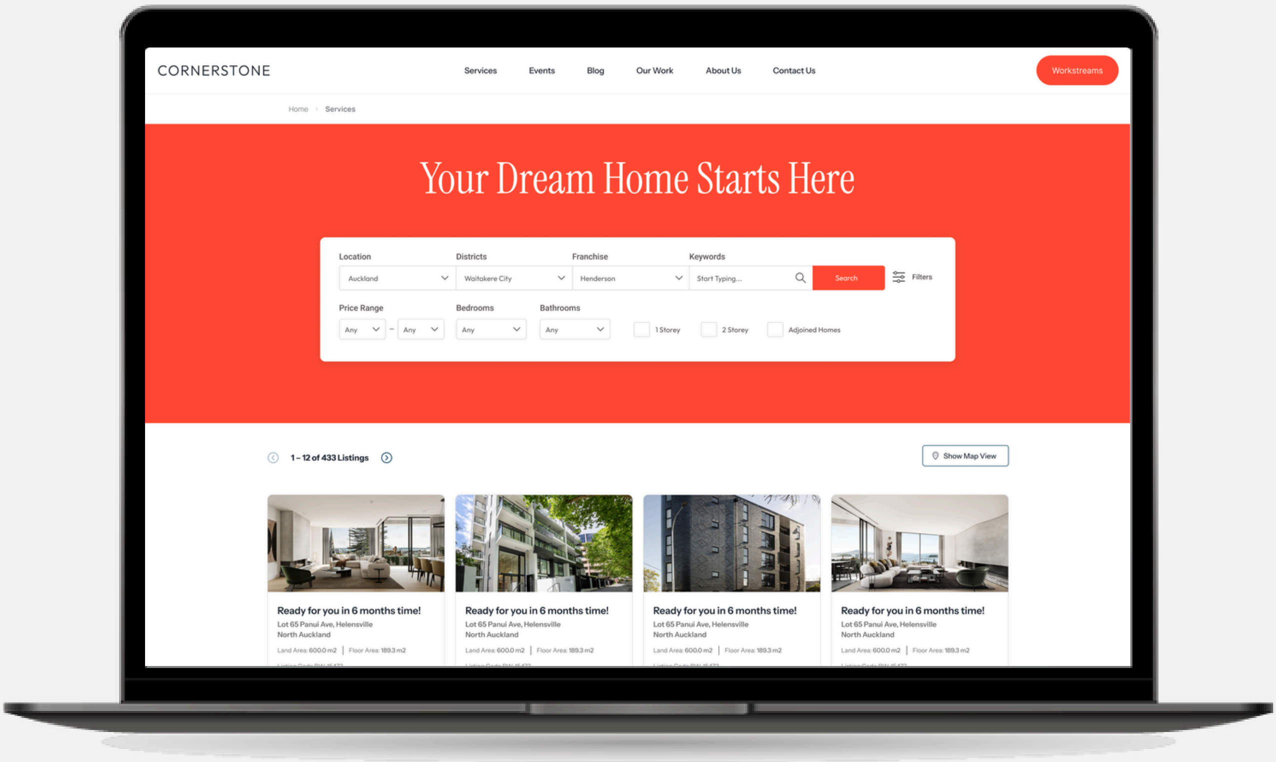
End-to-end sales process:

The solution doesn't stop at listing management. Once a buyer enquires, the full purchase process can be automated from that point forward, through to contract signing and deposit collection. Every stage is tracked in HubSpot, giving your team visibility of where every lead sits in the process and ensuring no prospect is dropped between enquiry and settlement.

What you can customise:

The solution is implemented as a configured starting point, not a rigid off-the-shelf product. Look and feel, colours, fonts, imagery and icons are tailored to your brand. Listing types, search filters, and reporting dashboards are set up to match your specific business model. Standard HubSpot reporting is available across all listing data from day one, with additional custom reports configured as part of your initial setup.





Events Management

Project launches, showhome openings, and buyer information evenings are among the highest-value touchpoints in a construction & property sales process. Most businesses are managing them through third-party platforms like Eventbrite or Humanitix, tools that don't connect well with HubSpot, require manual data exports to get attendee information into your CRM, and leave your event marketing disconnected from your broader campaigns and contact records.

HubSpot has no native event management capability. There is no built-in way to create events, sell tickets, manage registrations, handle check-ins, or trigger pre and post-event communications from within the platform, which means every event creates a data gap between who attended and what happens next in your sales process.

The Events Management solution solves this by making events a native object inside your HubSpot CRM. No third-party platforms, no integrations to maintain, no manual data reconciliation. Your events live in the same system as your contacts, your deals, and your marketing, so everything stays connected from the moment someone registers to the moment your sales team follows up.

What it does

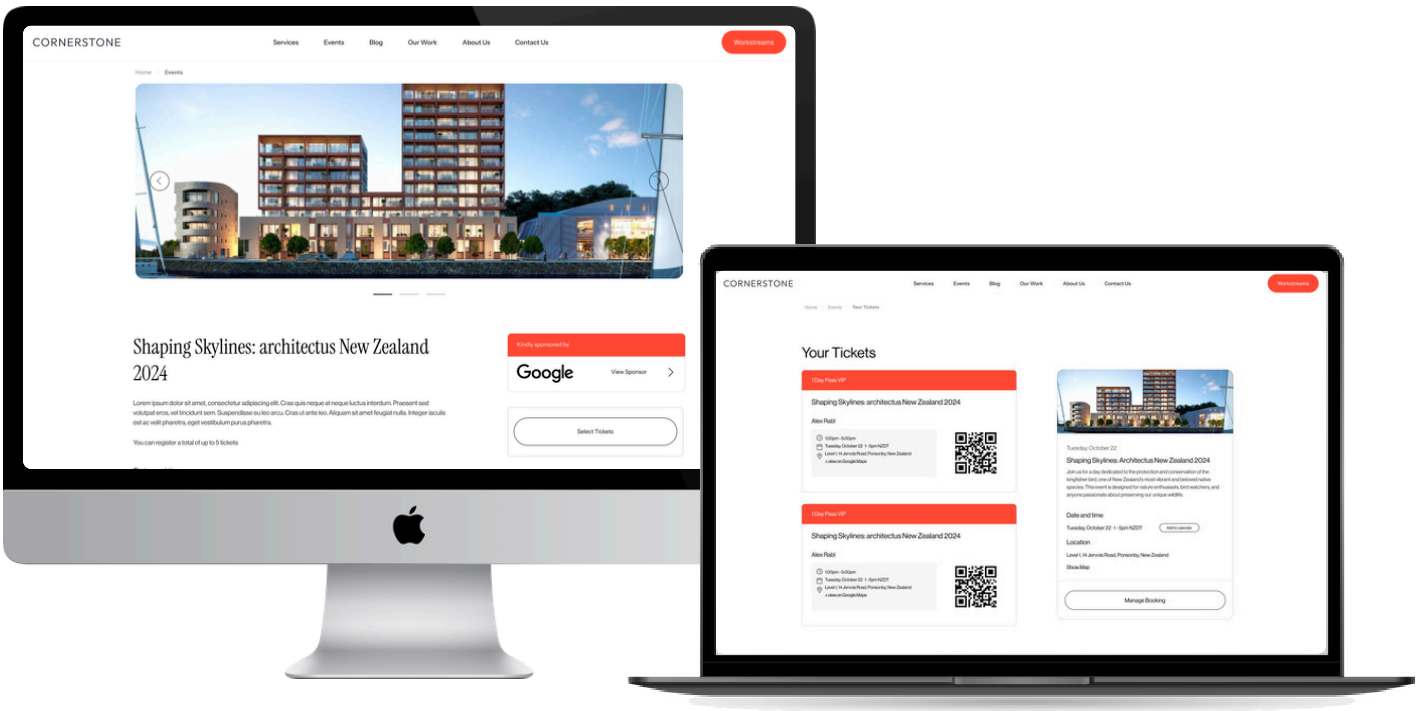
Each event is created directly in HubSpot and comes with everything needed to run it end-to-end, including landing pages, smart lists, QR codes, workflows, and automated communications, all configured as part of the event record. When you need to run the next one, clone the previous event, and every connected piece is instantly ready.

Managing your events:

- Create, duplicate, and go live with events in minutes from within HubSpot
- Manage event details, linked contacts, and activity in a single CRM record
- Set and manage capacity, ticket types, and waitlists
- Accept payments via Stripe, Google Pay, and credit card, with support for discounts, currencies, tax, receipts, and refunds
- Generate unique tickets with QR codes for each attendee
- Check attendees in and out on the day via QR code scan or manual search on any device

Communications and marketing:

- Automated confirmation pages and emails with add-to-calendar functionality
- Custom pre-event reminder emails and post-event follow-up sequences
- RSVP management and attendance updates
- Post-event surveys to collect feedback
- Promote events using HubSpot's Marketing Hub tools you already use; no additional platform needed
- Link events to existing HubSpot campaigns



Rporting

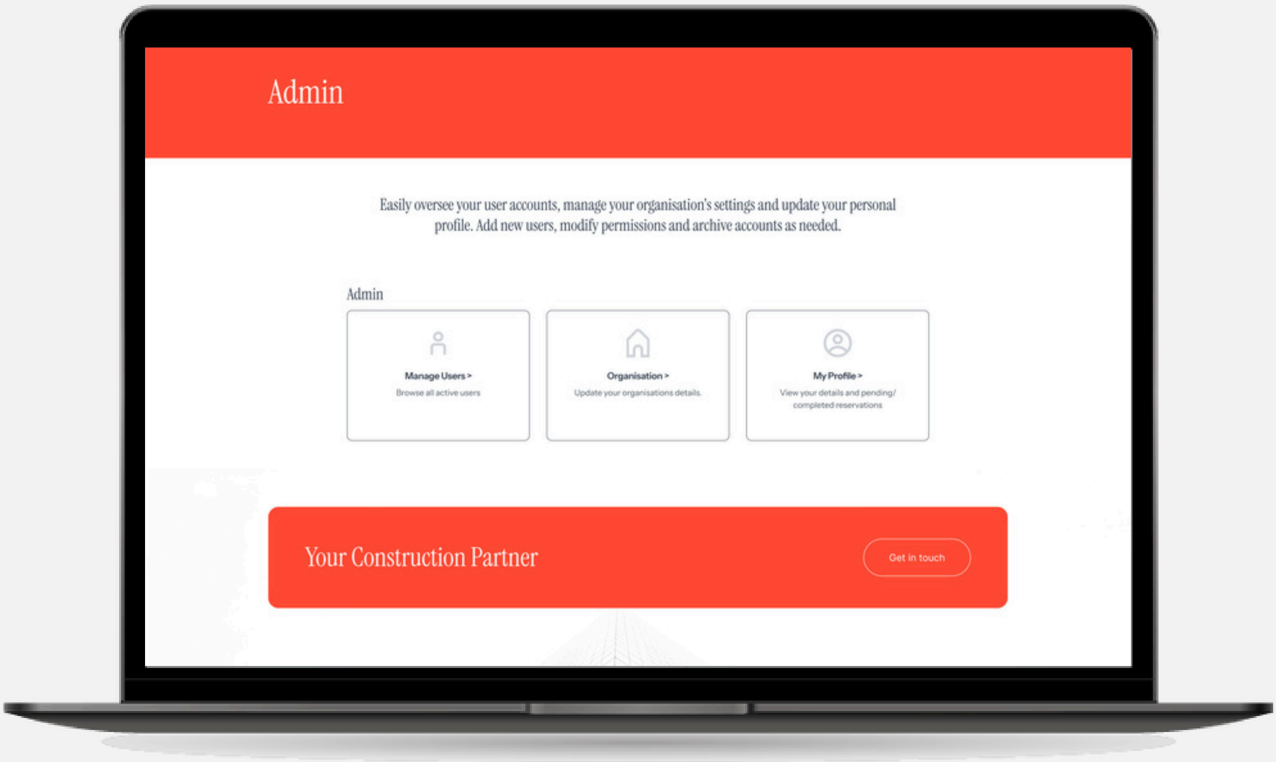
Because all event data lives natively in HubSpot, reporting uses the same tools as the rest of your sales and marketing data. Track registrations, attendance, engagement, revenue, and email performance in real time, no exporting, no stitching data together from separate systems.

Whatever the occasion

The solution supports free and paid events, webinars and virtual events, conferences and roadshows, members-only events, charity events, and multi-day programmes. Ticket types are fully configurable, including Standard, VIP, Early Bird, Child, or any structure your event requires.

Built to be tailored

The solution is implemented from a reviewed and configured template, with your branding, wording, and layout applied as part of the build. Custom features, invite-only access, member pricing, waitlists, favourites, discount codes, and custom checkout flows can be scoped and added to suit your specific requirements.



Document Generation

Construction businesses generate a significant volume of documentation throughout the sales and project lifecycle: contracts, reservation agreements, proposals, marketing brochures, onboarding guides, deposit receipts, and handover packs. In most businesses, producing these documents means opening a previous version, manually finding and replacing client and project details, and hoping nothing from the last deal was accidentally left in. It is time-consuming, error-prone, and impossible to scale consistently across a team.

HubSpot has no native document generation capability. There is no built-in way to take data from a contact or deal record and automatically populate a professional, formatted document, which means every document your team produces requires manual handling outside the CRM, creating inconsistency, admin overhead, and risk.

Document generation fills that gap. Automated document creation works directly from your CRM data, using templates managed in Microsoft Word, Google Docs, or Google Slides, triggered by HubSpot workflows. Everything is managed entirely within HubSpot. No logging into a separate system, no third-party dashboard to maintain and no switching between platforms.

How it works

Templates are created and managed in the tools your team already uses, such as Word, Google Docs, or PowerPoint. Personalisation tokens are added to the template using a straightforward syntax. A HubSpot workflow triggers document generation based on any CRM activity or deal stage, from any object, including contacts, companies, deals, tickets, and custom objects. The relevant data is pulled from the triggering record and any associated records, the document is populated automatically, and the output is stored back in HubSpot. Any errors or issues are logged directly against the HubSpot workflow, so your team never needs to go outside HubSpot to diagnose a problem.

What it generates:

- Contracts and reservation agreements
- Quotes and proposals
- Marketing brochures with dynamic images and content
- PowerPoint presentations and project decks
- Onboarding guides and welcome packs
- Monthly reports and project deliverables
- Receipts and deposit confirmations
- Any standard document, spreadsheet, or presentation that requires personalisation from CRM data

Key capabilities:

- Generate documents from any HubSpot object or associated record
- Dynamic images and hyperlinks pulled directly from CRM data
- Advanced formatting, calculations, and repeating sections for complex documents
- Advanced logic to show and hide sections based on CRM data
- Integrate with DocuSign for digital signing without leaving the HubSpot workflow
- Attach generated documents to transactional emails via Mailgun, triggered from the same workflow
- Dynamically create folders and store generated files in SharePoint or Google Drive
- Clone records, including associated records from within HubSpot workflows
- Pricing based on documents generated, not the number of users, scales with the value it delivers

What this means for construction businesses:

Every document in your sales process, from the first reservation agreement through to handover documentation, can be generated automatically from the deal record the moment it is needed. The right data is always in the right place. No errors from manual entry, no risk of a previous client's details appearing in a new contract, no administrative bottleneck slowing your sales team down at the moments that matter most. And because this sits within the broader connected solution, the same workflow that generates a contract can simultaneously send it for signing, email it to the buyer, and file it in SharePoint, all without a single manual step.

Establishing goals and timelines

There are three main points to be made here:

01

You're never going to achieve 'like for like'

What we mean by this, is that when you're incorporating new platforms and switching up your tech stack, you need to accept that with new benefits comes a degree of change. If you expect the new setup to be exactly like the old one in terms of usability, you will be disappointed. Your goals should be set up in a way that accounts for change, and sets realistic expectations about what it is your business can and wants to achieve.

02

It's a marathon, not a sprint

It's not uncommon for companies to want to get everything done in the first leg of the race. Instead of looking at setting up your tech stack like a "one and done" operation, start to view it as a roadmap. Include key checkpoints and milestones that you need to hit to get you to the final destination. Certain legs of the project may be delivered under tight timelines, but think about them as part of a larger project.

For example you may implement Marketing first, then a specific Sales team, and then roll out to your broader business.

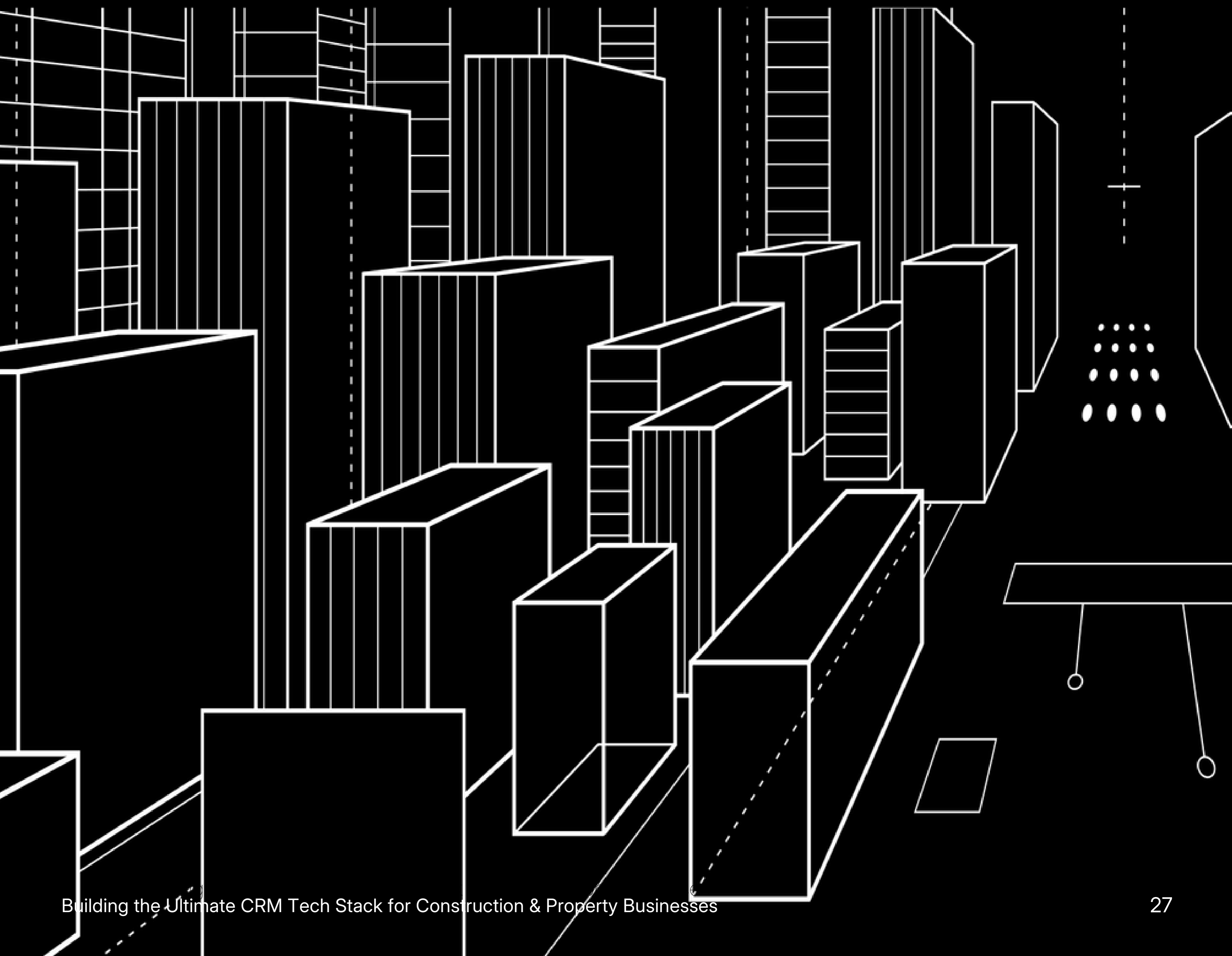
03

Take Parkinson’s Law into consideration

Parkinson’slaw states thatwork willexpandtofill the time allotted for its completion. In this context it means, if yougive people too much time to do the project, there will be too many iterations, too many changes and you’ll end up with no clear overall direction. Additionally, software and your business are evolving so quickly, that if you design a solution one year and deliver it a year later, the solution may no longer even be relevant.

Commit to a lower, simplified scope, with tight, focused timelines and concise goals. Make it clear to your stakeholders why you have the timelines and the importance of driving toward them.

Additionally, take note of your licence renewal dates for existing platforms. If cutting costs is a big driver, then you’ll want to base your deadlines on these so you aren’t doubling up on licensing fees.



Your implementation partner

Understanding what is needed for a true partnership

Of course it's one thing to have found the perfect platform for your needs. But if it isn't implemented to suit the needs of the business, it will never succeed in delivering value, or worse, will render the business unable to perform BAU.

When choosing an implementation partner, consider the following aspects:

What kind of expertise do they have in-house vs what will need to be outsourced?

What level of support is required for Change Management?

What level of training and existing tools and modules do they have to help get your team trained and using the new setup?

What region/timezone are they based in? Do they have the ability to deliver for your time zone/across multiple time zones?

If you're a larger organisation, consider their ability to manage multiple layers of stakeholders throughout the project.

Do you need to integrate with existing platforms? If so, do they have the necessary level of expertise to manage this?

What experience does the partner have in working with Development/Construction clients? Insight in this area can be crucial to helping improve your existing marketing and sales processes.

A cultural shift

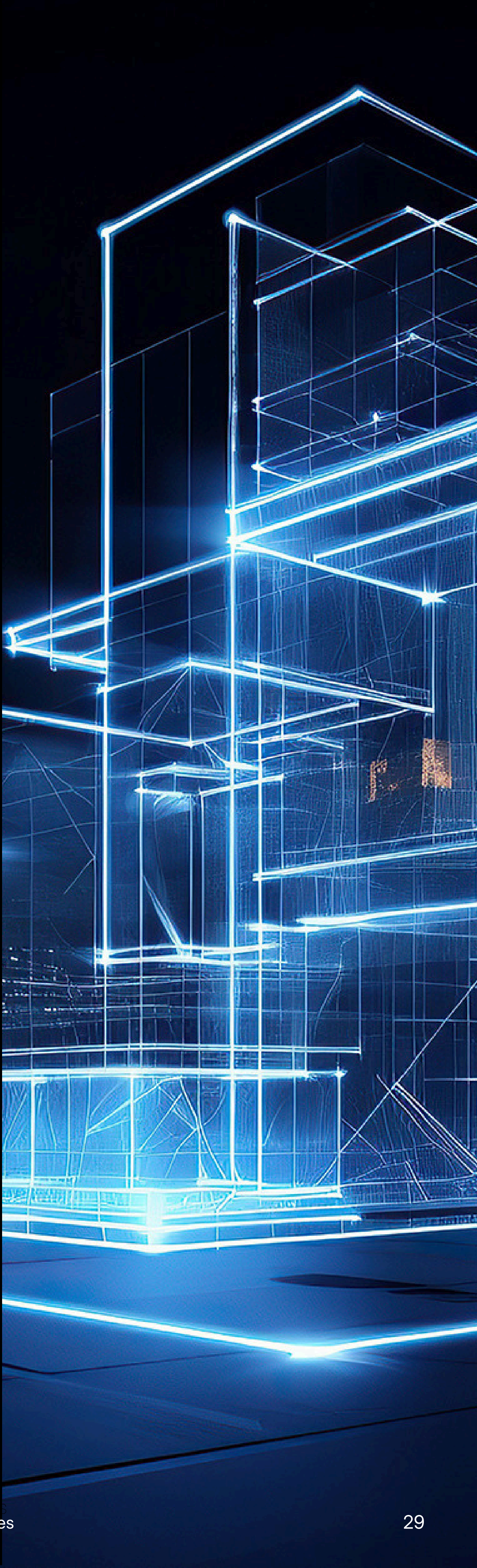
"The success of a new CRM and the peripheral technology that accompanies it, is as much about change management, as it is about the tech itself.

The human element is one of the largest contributors to a project's overall success.

Changing CRM means your people will have to adapt to a new tool while trying to balance their day-to-day work. Some people may find this challenging, so failing to acknowledge it at the outset of the project can set an unrealistic expectation.

However, building in robust methods of taking people on the journey, and including their feedback in the design of the CRM will provide a sense of buy-in and in turn, drive a higher rate of adoption".

Ryan Watkins - CEO, Avidly APAC



Failing to incorporate a robust change management strategy into your overall project structure will see you face common issues such as:

- Low user adoption rates
- High levels of resistance to change
- Siloed working resulting in communication breakdowns and scope creep
- Fear of job loss
- Siloed information pockets, individuals holding key process information or relationships
- Confusion and concern around security
- Resistance around sharing customer and project information with other teams
- ICT implementing new platforms to support the solution
- Blockers inflating the perceived complexity of work
- Confusion around user management / login / general access / SSO
- Continued use of spreadsheets and emails for communication and housing of data that should be put into the CRM

Key aspects of your change managementstrategy should include:

Executive buy-in

It's important for your leaders to not only understand the change, but to encourage it. Teach them the benefits of adopting your new technology, so that they can in turn become a champion for it throughout the business. It will be very difficult to drive this change in isolation without buy-in from these key stakeholders.

Communication strategy

Transparency is key. Create a comprehensive communication plan to bring your people along the journey with you.

Include information about:

- The purpose of the tech implementation
- What the benefits are on both a business and individual level
- The project timeline
- Who employees can speak to if they want further information

And make sure to address any concerns that come up for your employees around this.

Training and Development

When it comes to change resistance around new technology in a business, one of the main contributors to this is feelings of fear and insecurity. Employees fear that they will become redundant or that they won't be able to upskill to keep up with the change. This is where you'll typically experience high degrees of resistance.

To counteract this, it's important that you provide training sessions for your people so that they feel more empowered using the new tech and in turn, can empower others. Offer ongoing support and resources to encourage development in this area.

Feedback and continuous improvement

While there may be similarities in tech-stacks being built throughout the construction industry, ultimately each one will be (or should be) customised to suit the needs of that specific business and its operations. Therefore, tech stack implementation will never just be a one-and-done process. It's a cyclical process of continuous improvement. You should incorporate feedback mechanisms to gather input from the end users throughout the implementation process, and then use this feedback to reevaluate your solution and adapt accordingly.

Critical Success Factors of CRM Delivery

From an experienced partners' point of view

Avidly APAC's 'secret sauce' is a result of watching many of these types of projects fail, and designing a method of delivery that mitigates these common pitfalls and speaks to 5 common success factors.

01

Select for multi-disciplinary experience

There is a huge advantage in partnering withthose who have the disciplines in-house to develop bespoke customisations, to suit unique business drivers and goals. As opposed to outsourcing certain expertise and functions, the beauty of having experts all collaborating and sharing ideas at each stage of delivery means more robust outcomes and risk mitigation.

02

Get aligned

Alignment across stakeholders, values, ways of working and cultural factors are critical to success. From the executive project sponsor and across the organisation, stakeholders need to be fully engaged and technologically mature enough to apply appropriate resources, so their partner can do their job effectively.

03

Appreciate the big picture

Solve for the business first. Understand how different business units operate and what they need to unify the solutions, rather than working from the tech backwards — resulting in multiple disparate systems.

Understand as a partner that, regardless of the scale and importance of a CRM transition project, this is just one workstream in play for a sizable organisation. There are always other business pressures and priorities taking place — for example, restructuring of human resources and managing external threats.

04

Get your governance right

Oftentreatedas an afterthought, embedding strong governance practices across all contributors is the linchpin of successful delivery at pace. Steering committees and sessions that have both the key exec sponsors and the platform tech partner involved, will mean faster decisions and escalations. Without that support lined up you will flounder.

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Know the meaning of a true partnership

Thepartner andclientmust viewthe projectas a team effort. Projects are guaranteed to go wrong at times, so your alignment and equality in the sharing of these issues will make or break it. You must have mutual agreement on commercial outcomes, and communicate these regularly. Make space for the partner to truly become a part of your team for as long as it takes, setting up physical working space within your organisation.

Conclusion and putting it into practice

We've seen construction companies struggling with the complexities of legacy systems and siloed processes, often leading to significant challenges and inefficiencies. From slow response times to market initiatives, to a lack of unified customer experiences, the symptoms of outdated technology are obvious.

However, there is a better way.

Strategic platform selection

Choosing the right platforms for your business requires a clear understanding of its goals and objectives. Rather than diving straight into what features you want, your business should define the desired experiences and prioritise functionalities that align with those needs.

Tech stack consolidation with CRM at the core

By placing a robust CRM system at the centre of your tech stack, your business can streamline processes, unify data, enhance operational efficiency and deliver better customer experiences, everytime.

Change management and partnership

Executive buy-in, comprehensive communication, training, and continuous feedback are absolutely critical elements of a robust change management strategy. Additionally, partnering with experienced professionals who understand business objectives and possess multi-disciplinary expertise is key to success.

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Certified Agency
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At Avidly APAC our diverse team boasts a range of expertise across all areas of the implementation process—from project management, through CRM and integrations, all the way to marketing. We've got people who know not only how to technically execute, but also how to bring your people along the journey.

As HubSpot's 6 x Partner of the Year for the entire APAC region, we've helped over 400 businesses achieve stronger and more efficient ways of working through our CRM implementation methods, with many of those companies being in the property and construction industry.

We work with companies who know the value that CRM can bring to their organisations, and can commit to the changes necessary to level up their businesses and get ahead.

Is your company the right fit for us?

Let's talk