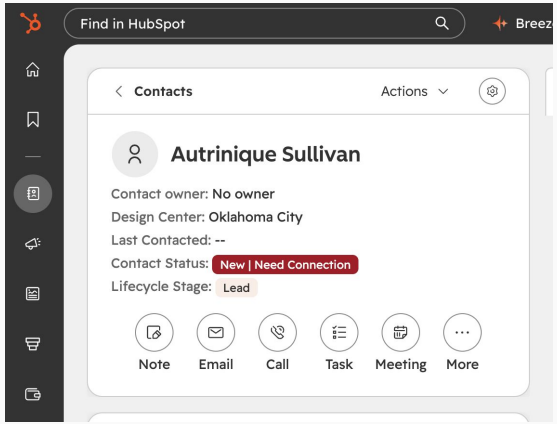
UBH HubSpot

November, 2026

Contact Status

- **Contact Status** replaces the Lasso Rating
- Contact Status is an automated rating based on Design Consultant and General Manager input and actions



Qualification Questions

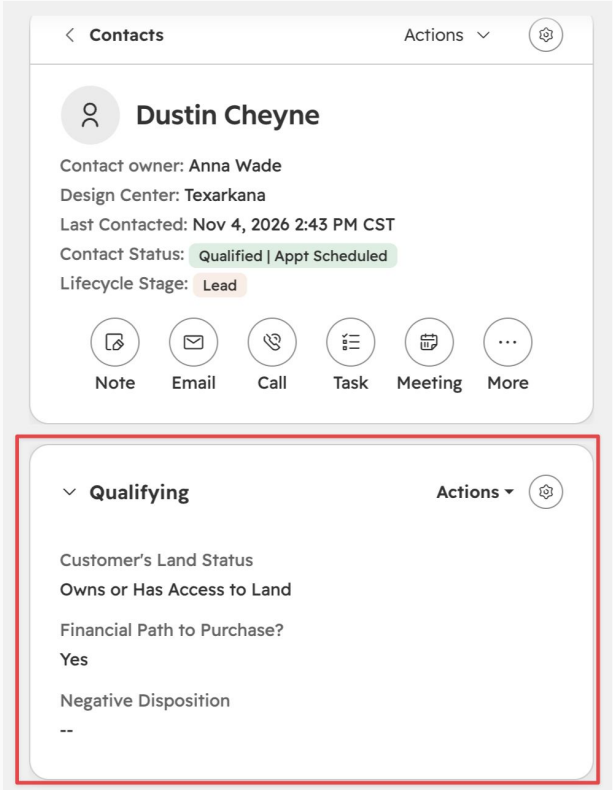
HubSpot includes three key qualifying questions that will drive many of the Contact Status:

- **Customer's Land Status**
  - Connected but Unknown - *contact has been made with the customer, but their land status has not yet been determined*
  - Owns or Has Access to Land
  - Looking for Land
  - Does Not Own Land

- **Financial Path to Purchase**
  - Connected but Unknown - *contact has been made with the customer, but their financial path to purchase has not yet been determined*
  - Yes
  - No

- **Negative Disposition**
  - Lost
  - No Response
  - Out of Area/Spam

Qualification Questions



Contact Statuses

Contact Status is more detailed than the Lasso Ratings:

New | Need Connection

*All new digital contacts arrive in HubSpot with this rating. Equivalent to a Lasso **N** rating*

Contact Statuses

Connected | Need More Info

Contact has been made with the customer, but their land status and/or purchasing ability is unknown

HubSpot Qualifying:

Customer's Land Status = *Connected but Unknown*

OR

Financial Path to Purchase = *Connected but Unknown*

Contact Statuses

Connected | Future Buyer

Contact has been made with the customer, land status is known, and purchasing ability is known, but the customer is not qualified today.

HubSpot Qualifying:

Customer's Land Status = *Looking for Land* or *Does Not Own Land*

OR

Financial Path to Purchase = *No*

Contact Statuses

Qualified | Land and Financial Path

Contact has been made with the customer, the customer has access to land, and they have the financial path to purchase. But, a next step appointment has not been made.

HubSpot Qualifying:

Customer's Land Status = *Owns or Has Access to Land*

AND

Financial Path to Purchase = *Yes*

Contact Statuses

Qualified | Appointment Scheduled

Contact has been made with the customer, customer has access to land, and they have the financial path to purchase. A meeting has been scheduled in HubSpot, but it has not been completed.

HubSpot Qualifying:

Customer's Land Status = *Owns or Has Access to Land*

AND

Financial Path to Purchase = *Yes*

AND

Meeting Scheduled in HubSpot

Contact Statuses

Qualified | Appointment Completed

Contact has been made with the customer, customer has access to land, and they have the financial path to purchase. A meeting has been completed in HubSpot.

HubSpot Qualifying:

Customer's Land Status = *Owns or Has Access to Land*

AND

Financial Path to Purchase = *Yes*

AND

Meeting Completed in HubSpot

Contact Statuses

Lost

Contact has been made with the customer and interaction has occurred, including a possible Sale. However, the customer will not proceed with UBH. An example would be the customer choosing a different builder.

HubSpot Qualifying:

Negative Disposition = Lost

Note: If Negative Disposition is set to anything other than empty, it will override any other qualifying question.

Contact Statuses

No Response

No contact has been established despite completing all required follow-up efforts outlined in the sales process. The GM and RGM will determine when a contact should be classified as No Response.

HubSpot Qualifying:

Negative Disposition = No Response

Note: If Negative Disposition is set to anything other than empty, it will override any other qualifying question.

Contact Statuses

Out of Area/Spam

The contact intends to build outside our service area, or the inquiry is determined to be spam, junk, or otherwise invalid.

HubSpot Qualifying:

Negative Disposition = Out of Area/Spam

Note: If Negative Disposition is set to anything other than empty, it will override any other qualifying question.

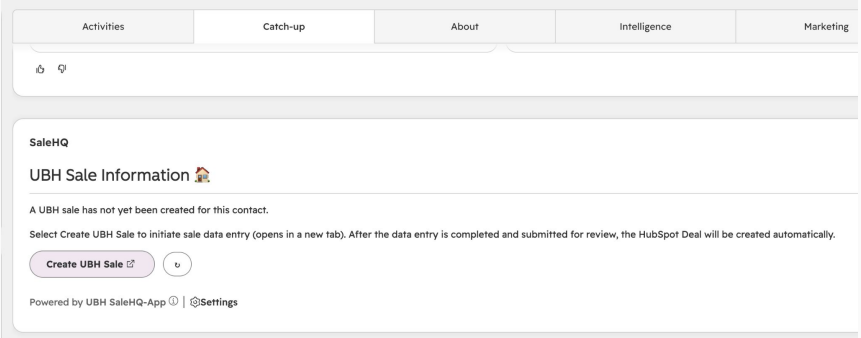
Contact Statuses

Sale

A UBH sale has been created for the Customer. A Deal is added to HubSpot

HubSpot:

- Sale entry must start in HubSpot
- Sale must be completed in Account Portal



Contact Statuses

Booked

The account has been booked in the Account Portal

HubSpot:

- Booked Contact Status will be set automatically by the Account Portal

Automatic Contact Emails

HubSpot has been configured to send two types of automatic emails when a new Contact is added:

- Marketing emails
  - Professional, with nice colors and images
  - One theme per email
  - Continue to be sent unless customer opts out
  - Sent from *hello@ubh.com*, not the Design Consultant
  - Replies are added to the Contact record

- 1-1 emails
  - Designed to be conversational and personal
  - Continue until contact is made (email, phone call, SMS) or customer opts out
  - Sent by the Design Consultant
  - **Not sent to call-in or walk-in Contacts**

Automatic Email Schedule - Online Lead

This schedule assumes no direct contact is made and no opt-out:

- Day 1: Marketing - *Immediate*: New Contact Corporate Welcome
- Day 1: 1-1 - *15 minute delay*: Thanks for reaching out
- Day 2: 1-1 : What would be most helpful now?
- Day 4: 1-1: Your free Land Assessment
- Day 6: 1-1: Questions about financing your new home?
- Day 8: Marketing: Building on your land doesn't have to feel complicated
- Day 12: 1-1: Have you found a plan you like?
- Day 18: Marketing: See what your future home could look like (Higharc)
- Day 28: 1-1: A few things to consider when choosing a builder
- Day 35: Marketing: Why fixed price matters
- Day 48: Marketing: A different way to finance a new home
- Day 60: 1-1: Are you still thinking about building?
- Day 70: Marketing: From floor plan to your new home
- Day 90: Marketing: Homeowner story
- Day 120: Marketing: Why UBH?

Remember, 1-1 emails stop when contact is made. Marketing emails continue.

Automatic Email Schedule - In Person or Call In Lead

1-1 emails are not scheduled for in person or call in leads.

- Day 1: Marketing - *2 hours after Contact is entered*: New Contact Corporate Welcome
- Day 8: Marketing: Building on your land doesn't have to feel complicated
- Day 18: Marketing: See what your future home could look like (Higharc)
- Day 35: Marketing: Why fixed price matters
- Day 48: Marketing: A different way to finance a new home
- Day 70: Marketing: From floor plan to your new home
- Day 90: Marketing: Homeowner story
- Day 120: Marketing: Why UBH?