WHAT WE BUILD

Intro (lead):

From architect-driven custom homes to thoughtful remodels—and across Austin and the Texas Hill Country—we deliver precision, transparency, and concierge care.

What We Build

Custom Homes

Architect-led or design-build; validated budgets, proactive scheduling, and transparent reporting.

[IMAGE PLACEHOLDERs: contextual image]

Rotation of custom homes, 2-3 views per home

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Remodels & Additions

Complex scopes handled with the same precision and communication standards as new builds.

[IMAGE PLACEHOLDER: contextual image]

Rotation of 2-3 views per remodel

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Designs under Construction

Precision in progress—current builds tracking schedule, quality, and budget.

[IMAGE PLACEHOLDER: contextual image]

Rotation of 2-3 views per remodel

Assurances:

Bonded & insured • Stable banking relationships • Vendor management to control cost, schedule, and performance.

ABOUT — Story and Team

Our Story (120–200 words):

Sanctuary Custom Homes was formed to deliver a calmer, clearer building experience. Our team brings decades of construction and project leadership to each home, pairing meticulous field execution with proactive communication.

Values (bullets):

· Integrity & Competence

· Structured Process

· Clear Communication

· Technology-Driven

· On-Time Delivery

Nick Chappell — Managing Partner, Project Delivery & Operations (80–100 words):

With nearly 30 years in Texas construction, Nick has done everything from lead framing crews of 25+, to deliver more than 60 custom homes and multimillion-dollar estates as a builder. He blends hands-on trade expertise with modernized construction methods, strong developer relationships, and a reputation for reliability and detail.

[IMAGE PLACEHOLDER: Nick headshot (800px square)]

Robert D. Corion — Managing Partner, Finance & Innovation (80–100 words):

Robert brings 30+ years of global executive leadership across energy, infrastructure, and technology. Known for project management rigor, budgeting, and vendor optimization, he has managed $100M+

operations and built scalable vendor networks—bringing enterprise-grade discipline to residential construction.

[IMAGE PLACEHOLDER: Robert headshot (800px square)]

Architects we partner with:

JB Architecture – Jon Butler – Architecture and Design

Contact — JB Architecture

Side Angle Side – Architecture and Design

SIDE ANGLE SIDE

Thomas Tornbjerg

Work — Tornbjerg Design

Leading Architects in Austin, Texas - Webber + Studio

NHA - Nathan Harwell – Architecture – need web info – only have link to small portfolio

Interior Designers we have worked with :

Jameson Design Group | Interior Design | Architectural Design | Austin TX

slic design

WRJ Design - Whitney Reiser Johnson – no web info

Credits per job listed below :

Name on website: Sylvan Drive

Address -1717 Sylvan - JBA Architecture , WRJ Design for interior design, Amy Dang Photography, Nick Chappell with Gasparini Custom Homes

Name on website: Bouldin Avenue

1716 Bouldin – JBA Architecture, WRJ Design, Amy Dang Photography, Nick Chappell with Gasparini Custom Homes

Name on website: Kinney Avenue

2104 Kinney – JBA Architecture for architecture and interior design, Nick Chappell with Gasparini Custom Homes, Amy Dang Photography

Name on website: Rainbow Ranch

127 Rainbow Ranch – NHA Architecture – WRJ Design – Nick Chappell with Sanctuary Custom Homes

Name on website : Superview Drive

10515 Superview - Jameson Design Group for interior design and Architecture, Urban Oak Photography, Nick Chappell with Sanctuary Custom Homes

Name on website: Woodmont Avenue

2511 Woodmont – Side Angle Side Architecture and Interior Design, Nick Chappell and Robert Corion with Sanctuary Custom Homes

Name on website : Clawson Drive

4703 Clawson Drive – Architect Point B Design Group , WRJ Design for Interior Design, Nick Chappell with Gasparini Custom Homes

Name on website : Bellaire Drive (no photo credit needed here)

1502 Bellaire – JBA Architecture, slic design for Interior Design, Nick Chappell with Sanctuary Custom Homes

Name on website :: Lorrain Street – PHOTOS COMING SOON

1211 Lorrain Street – Texas Porch House Design Build(architect and builder) , Nick Chappell with Nick Chappell Design

Project Credits — Style Guide (Web & Print)

Goal: Present consistent, professional credits on each project page and portfolio card. Use the following format and style rules.

Credit Line Format

Architect — Interior Designer — Photography — Builder

Example: JBA Architecture — WRJ Design — Amy Dang Photography — Sanctuary Custom Homes

Style Rules

• Firm casing: Use official brand casing (e.g., “WRJ Design”; preserve “slic design”).

• Legacy builds: For projects built pre-Sanctuary, use “Builder: Nick Chappell with Gasparini Custom Homes (legacy).”

• No trailing punctuation; use en dash (–) separators between roles.

• If a role is unknown, omit it (do not insert “N/A”).

CMS Fields (for Developers)

Projects: Title, Address, Area/City, Architect (Ref), Interior Designer (Ref), Photographer (Ref), Builder (Ref), Status, Style (tags), Sq Ft, Bedrooms, Baths, Cover Image, Gallery, Narrative, Highlights, Credit Line (computed).

www.sanctuaryhomesatx.com

Page1 – HOME PAGE

Floating banner is our name, phone number, link to send email and menu.

The site is a full page images of a single homes curb view, rooms, outdoor, pools, living rooms etc. that scroll on a timer of 10 seconds.

- If you scroll down you see other homes based on categories by neighborhood or location. Categories include New construction, Remodels, we could add other categories to meet our portfolio

· Scoll down to show commitment to lifetime service support from day 1 onward

Menu (small window) includes

1. Home
2. About Us
3. Featured Projects
4. Our Building Methodology
5. The Sanctuary Difference
6. Testimonials
7. Contact Us

Utility pages: Privacy, Terms, 404, Thank-you (form success).
Footer: Quick links, contact info, licenses, social, newsletter signup.

Journal (Blog / Insights)

Sanctuary Custom Homes — Website Structure & Developer Spec (v1)

Primary model site: Zbranek & Holt Custom Homes (ZH)
Incorporate unique elements from: Southerly Homes (SH), Shoberg Homes (SB)

Goal & Design Direction

1. **Goal:** Launch a premium, conversion-focused website that communicates luxury custom home craftsmanship, a clear end-to-end process and makes it

easy for prospects to request a consultation via an easy qualification process with a internal priority background lead generation scoring and prioritization.

2. **Look & feel:** Refined luxury mix of City and Hill-Country modern. White/near-white backgrounds, generous negative space, large serif/sans headline pairing, subtle motion, crisp project photography, less is more on words.

3. **Voice:** Confident, service-first, Texan warmth (approachable, concierge tone).

4. **Differentiator to feature:** Mix of quality and value, concierge post-sale service + warranty + digital handover of project data (drawings, selections, O&M manuals). (This is a Sanctuary signature.)

~~Information Architecture (Sitemap)~~

~~Home~~
~~├── Portfolio (All Projects, Completed Projects, Current Projects?~~
~~│ ├── New Construction (filter)~~
~~│ ├── Remodels & Additions (filter)~~
~~│ └── Individual Project Detail pages~~
~~├── What We Build (Services)~~
~~│ ├── Custom Homes, Spec Homes~~
~~│ ├── Remodels & Additions~~
~~│ ├── Process (Our Approach)~~

~~Your Journey Home — Demo~~
~~├── Where We Build (Service Areas + Map)~~
~~├── Resources (Partners: Architects • Designers • Realtors) TBD~~
~~├── About (Story • Team • Awards • Associations • Press)~~
~~└── Contact (Consultation Form • Phone)~~

Page-by-Page Wireframe & Content Blocks

A) Home (base on ZH layout; add SH + SB elements)

1. Home

- Big headline (two-line lockup), subline, primary CTA ("Request a Consultation"), secondary CTA ("View Portfolio").
- Full-bleed image or short autoplay background reel (3–5s) of signature project.
- What We Build" Teaser (3 tiles) Explain our experience i.e. City of Austin Complex permitting, Hiil Country expertise, Difficult infiled lots and speciality across each bullet below with examples.
- Categories include:
  - § Custom Homes
  - § Remodels & Additions Each links to detail.
- Portfolio (grid + filters; borrow SB's rigor)
- Archive/Grid: Masonry or uniform cards; filters: Project Type, Neighborhood/City, Architect, Style (Modern, Transitional, etc.).
- Sort: Newest • Oldest • A-Z.
- Card: Cover image, title, location, quick stats; hover shows "View Project".
- Project Detail (SB-style depth): - Hero gallery (carousel) + quick stats (Sq Ft, Beds/Baths, Completion, Lot type).
- Credits: Architect, Interior Designer, Landscape, Photographer, Build Team. - Narrative: Challenge → Design Approach → Craft Details → Outcome. –
- Gallery: 12–30 images, grouped by spaces; optional short video if available.

2. About Us

- Story (why Sanctuary), team bios with headshots
- Optional culture slider (behind-the-scenes) (we have fun – fishing pic)

· As seen on HGTV, Youtube, etc.

3. Featured Projects (3–6)

- Large cards with location, architect credit, style tag. Link to project detail.

4. Our Building Methodology (4–6 steps)

- Process, Design, Budgeting, Permitting, Materials, Inspiration.
- Icon + short blurbs. “See full process” link.
- 6–8 step timeline (Land/Brief → Design → Pre-Con → Construction → Commissioning → Handover → Warranty).

5. Sanctuary Difference *(our unique)**

· Post-sale service, warranty management, digital handover (client portal)

· Resources- Partners etc.

6. Testimonials

- Quote, client name, neighborhood, project type.
- 90% of our projects are referrals

7. Partners

· stress special relation with seamless engagement opportunities)

· Curated partner directory (Architects, Interior Designers, Realtors).

· Each partner card: logo, short bio, specialties, link.

8. Contact Us -

- Short form (name, email, phone, city, budget range, timeline) or button to full Contact.
- “Book a 15-min Intro Call” (calendar embed) and downloadable “Getting Started Guide.” - schedule with calendy

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Software Developer Info

Component Library (Dev-Ready)

1. **Header (sticky)** with transparent on top; solid on scroll. Mega-menu for Portfolio/Services.
2. **Hero variants:** image, muted video, split hero (image + copy).
3. **Buttons:** Primary (solid), Secondary (outline), Tertiary (text). Sizes: L/M/S.
4. **Cards:** Project card, Post card, Partner card, Testimonial card.
5. **Sliders/Carousels:** Projects, testimonials, logos. Drag + arrows; autoplay optional.
6. **Accordions:** FAQ; spec sections.
7. **Timeline:** numbered steps with progress bar.
8. **Map module:** vector map with pins + area list.
9. **Stat block:** large numerals (years, awards, homes built).
10. **Form:** multi-step option with validation; spam protection.
11. **Footer:** 3-4 columns + legal strip.

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4) CMS Content Model (Headless-ready)

Types & Key Fields - **Project**: title, slug, summary, location (city, neighborhood), project_type (enum), style_tags [ ], sqft, beds, baths, lot_type, completion_date, hero_image, gallery [images+captions], architect, interior_designer, landscape, photographer, narrative_richtext, downloads [PDF], featured (bool), service_area (ref), SEO (title, description, OG image). - **Post**: title, slug, excerpt, body_richtext, hero_image, category, author (ref), related_posts [ ], SEO. - **Service**: name, slug, overview, budgets [min, max], typical_timeline, faqs [Q/A], featured_projects [refs], SEO. - **ServiceArea**: name, slug, map_coords, description, featured_projects [refs], SEO. - **Partner**: name, type (Architect/Designer/Realtor), logo, bio, website, contact. - **TeamMember**: name, role, headshot, bio, socials. - **Testimonial**: quote, client_name, project_ref, location, rating. - **Award**: name, year, organization, link, project_ref (optional), badge_image. - **Global**: nav, footer, social, contact_info, legal_text.

Media conventions - Hero images ≥ 2400px width; gallery ≥ 1800px; WebP + fallback. - Alt-text required; filenames kebab-case; tag images by space/room.

5) Copy & Microcopy (Examples)

5. **Home Hero H1:** “Ready to design & build your custom home.”

6. **Subhead:** “Luxury craftsmanship in Austin & the Hill Country, delivered with concierge service.”

7. **CTA:** “Request a Consultation”

8. **Sanctuary Difference bullets:** Post-sale care • Warranty management • Digital handover (plans, selections, manuals) • Transparent budgets & schedules.

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6) SEO & Structured Data

9. **URL scheme:** /projects/slug, /services/slug, /areas/slug, /journal/slug.

10. **Titles:** Page | Sanctuary Custom Homes.

11. **Meta descriptions:** 150–160 chars; include “Austin custom home builder”.

12. **Schema:** Organization + LocalBusiness (HomeConstructionCompany); on project pages use Project (+ creator for architect credit) and ImageObject for gallery.

13. **Internal linking:** surface 3 related projects on every project page; cross-link to Process/Services.

14. **Blog cadence:** 2×/month minimum; target long-tail queries (permitting in [neighborhood], timelines, cost ranges).

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7) Performance, Accessibility, Security

15. **Targets:** LCP ≤ 2.5s, CLS ≤ 0.1, TTI ≤ 3.5s on 4G; WCAG 2.2 AA.
16. **Technical:** Preload next hero image; native lazy-load; responsive srcset; font-display: swap; compress video; HTTP/2; CDN caching.
17. **A11y:** Semantic headings, ARIA where needed, visible focus, sufficient contrast, descriptive links.
18. **Security:** HTTPS, HSTS, reCAPTCHA/turnstile, input sanitization.

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8) Analytics, CRM, Events

19. **GA4 + Meta Pixel (optional)**; events: hero CTA, project card click, form start/complete, phone click, map click, filter usage, scroll depth, blog TOC click.
20. **CRM:** HubSpot or Pipedrive via webhook/Zapier; auto-route inquiries by service area.
21. **Thank-you page:** conversion goal; email auto-responder with next steps + scheduling link.

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9) Forms & Lead Qualification

22. **Contact (short):** name, email, phone, city/neighborhood (dropdown), project type (custom/remodel), budget range, desired start timeframe, how did you hear about us?
23. **Validation:** inline, required on key fields; spam prevention.
24. **Optional multi-step:** Step 1 basics → Step 2 project details.

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10) Tech Stack (suggested; adaptable to dev preference)

25. **Option A (modern headless):** Next.js 14 + TypeScript, Tailwind, shadcn/ui, Sanity/Contentful CMS, Vercel deploy, Cloudinary/Image CDN.
26. **Option B (WordPress):** WP + Advanced Custom Fields (ACF) + custom theme, WPGraphQL for future headless, Kinsta/WPEngine hosting.

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11) Acceptance Criteria (Done = ✅)

27. Pixel-perfect responsive across breakpoints (360, 768, 1024, 1280, 1440+).
28. All CMS types/fields implemented as above with editorial previews.
29. Portfolio filters functional and crawlable (server-rendered or hydrated quickly).
30. Project detail supports credits + downloadable lookbook.
31. "Where We Build" has interactive map + SEO content per area.
32. Lighthouse meets performance & a11y targets.
33. GA4 events firing; CRM receives structured lead payloads.

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12) Content & Asset To-Do (Client-side)

34. Curate 12–18 hero-quality images (≥2400px).
35. Draft 6–8 case studies with credits and 150–250 word narratives.
36. Compile awards/associations/badges.

37. List service areas (cities/neighborhoods) + 1–2 sentences each.

38. Provide team bios + headshots.

39. Draft 3–5 initial Journal posts.

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13) Page-Level Copy Skeletons (for writers)

Home
H1 • Subhead • CTA • Awards strip (logos) • Featured Projects (cards) • What We Build (3 panels) • Process Snapshot (steps) • Where We Build (map) • Sanctuary Difference (4 bullets) • Testimonials • Journal teaser • CTA band.

Project Detail
H1 (Project name) • Summary (1–2 lines) • Quick stats • Credits • Narrative (Challenge/Approach/Craft/Outcome) • Gallery • Related Projects • CTA.

Process
Intro paragraph • Steps 1–8 (each with owner decisions + deliverables) • FAQ • CTA.

What We Build
Overview • 3 sections (Custom/Remodel/ADU) with scope, budgets, timelines, FAQs • Case studies • CTA.

Where We Build
Map • Areas grid (card per city/neighborhood) • SEO blurb • Featured local projects • CTA.

Resources
Intro • Partner directory (cards + filters) • “Become a partner” CTA.

About
Story • Team • Awards/Press • Community • CTA.

Journal
Archive (filters by category) • Post detail with TOC, pull-quotes, related posts.

Contact
Short form • Offices • Phone • Calendar embed • Trust badges • Privacy note.

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14) Migration & Go‑Live Checklist

40. 301s (if replacing an existing site), custom 404, robots.txt, XML sitemap, canonical tags.

41. OpenGraph/Twitter cards, social share images.

42. Favicon + app icons (16–512px).

43. Cookie/Privacy policy, TX builder license # in footer.

44. Uptime monitoring + error logging.

Notes on Source Influence

45. **ZH:** hero structure, awards emphasis, portfolio prominence, dual‑office contact pattern.

46. **SH:** “Where We Build” section/page, Journal cadence, clear “What We Build” service framing.

47. **SB:** deep project detail with partner credits, resource directory of architects/designers/realtors, robust project filtering.

Next steps (internal): Select stack (A or B), confirm CMS of choice, approve IA, then begin low‑fidelity wireframes and content harvesting.

H) Lead‑Capture Implementations (Webflow‑native)

1) AI "Build Coach" (concierge chat) - Embed 3rd-party widget (Intercom/Drift/custom) with data-attributes for page context (project slug, area, campaign). - On qualified paths (budget present + start ≤ 6 mo), trigger **Calendly** modal; push transcript + qualifiers to CRM via webhook.

2) Instant Feasibility + Budget Range - Multi-step Webflow form; simple client-side logic to compute range bands; results page + **email-gated** PDF ("Your Feasibility Snapshot"). - Store inputs (city/area, sqft, finish level) in CMS for reporting or send directly to CRM.

3) Lot Finder / "Check My Lot" - Service Area map (Mapbox/Google) + form capturing address, parcel link, utilities, slope, HOA. - Route to acquisitions; auto-reply with expected next steps and optional partner-realtor intro.

4) Styleboard Match + Finish Visualizer - Upload 1–3 inspiration images; on submit, send to a serverless endpoint or 3rd-party; return a curated moodboard (good/better/best) via email.

5) "Owner Handover Pack" Sample (gated) - Download modal (email + phone). After submit: send sample PDF and book-intro CTA.

6) Book-Now Ribbon (sticky) - Global component; shows on key pages; opens Calendly. Track open/booked.

7) One-Click "Share with My Partner" - Small form (recipient email + note). Use webhook (Make/Zapier) to send a templated email containing page link + 3 images; add recipient as related contact in CRM.

8) Build Readiness Score (quiz) - 8–10 questions; client-side scoring; results page with segmented CTA (lot → "Check My Lot"; no lot → partner-realtor intro; architect on board → project discovery).

I) QA & UAT Checklist

48. **Responsive:** 360, 414, 768, 1024, 1280, 1440, 1920.
49. **Browsers:** Latest Chrome, Edge, Safari, Firefox; iOS Safari/Chrome; Android Chrome.
50. **CMS:** Validate required fields, conditional visibility, reference/multi-reference bindings.

51. **Forms:** Inline validation, error states, success overrides, spam prevention.

52. **A11y:** Headings order, alt text (from CMS), keyboard focus, color contrast AA+.

53. **Performance:** LCP element visible in first viewport; image sizes responsive; interaction latency ≤ 200ms.

54. **SEO:** Titles/meta, canonical, OG images, XML sitemap, robots.txt; internal links (related projects) resolve.

55. **Content checks:** Proofed copy, phone/email links, map embeds, 404 and search work as expected.

J) Launch & Migration Plan

1. **Staging & approvals:** Publish to staging domain; capture Lighthouse + a11y reports.

2. **Content freeze window:** Final CMS imports; lock editing during cutover.

3. **DNS cutover:** Update A/CNAME per Webflow; verify SSL.

4. **301 redirects:** Map legacy URLs → new structure (/projects/slug, /areas/slug, etc.).

5. **Search Console:** Submit new XML sitemap; request indexing for key pages.

6. **Post-launch checks (24–72h):** Forms, CRM webhooks, calendar embeds, analytics events, 404 monitor.

K) Governance & Maintenance

56. **Roles:** Owner (publishing + billing), Designer (structure/styles), Editor (content only), Developer (custom code/integrations).

57. **Change control:** Use staging for structural changes; schedule weekly content releases; document changes in a simple changelog CMS.

58. **Backups:** Use Webflow backups before major edits; export site snapshots quarterly.

59. **Content cadence:** Journal 2×/month; portfolio 1–2 projects/quarter; area pages reviewed quarterly.

60. **Image discipline:** Heroes ≥ 2400px (WebP/AVIF), galleries ≥ 1800px; compress background video; consistent naming + alt text.

L) Editor Training (SOP)

61. **Add a Project:**

    1) Create new Project in CMS → fill required fields (Hero, Summary, Stats, Credits).

    2) Upload gallery images; add captions where helpful.

    3) Relate Service Area + Style Tags; toggle “Featured” if applicable.

    4) Publish and verify related modules (Related Projects, Area pages).

62. **Add a Journal Post:** Title, Excerpt, Hero, Body (use H2/H3, callouts), Category, Author; preview on staging; publish.

63. **Service Areas:** Keep description 150–250 words; relate 1–3 projects; verify map.

64. **SEO:** Unique Title/Meta/OG image; check internal links; alt text not empty.

65. **Publishing:** Draft → staged publish → production publish after checklist.

M) Brand System (for Webflow)

66. **Palette:**

    - **Cedar Charcoal** #2B2B2B — primary text/background contrast
    - **Warm White** #F8F6F2 — page background
    - **Sanctuary Sand** #E9E4DC — section backgrounds/cards
    - **Hill Country Sage** #6F7E6A — accents, links, small headings
    - **Copper Accent** #B87333 — CTA highlights, small rules

67. **Typography:** Headline serif (e.g., *Playfair Display* or *Cormorant Garamond*), Body sans (e.g., *Inter*). Host fonts via Webflow; set global variables for sizes/weights.
68. **Buttons:** Primary (Copper fill on Charcoal text reversal), Secondary (outline), Tertiary (text). States: hover, focus, disabled.
69. **Iconography:** Thin outline icons; consistent stroke; use as CMS icons for Process steps.
70. **Logo concept:** “SCH Home” monogram—S-C-H letterforms forming a simple house silhouette. Use as favicon and watermark on project lookbooks. Wordmark: “Sanctuary Custom Homes.”

N) Roadmap

71. **Phase 1 (Launch):** Home, Portfolio (filters), Project detail, What We Build, Process, Where We Build, About, Contact, Journal; Book-Now Ribbon; basic lead routing; handover sample (gated); Analytics + Consent.
72. **Phase 2 (60–120 days):** AI Build Coach; Feasibility wizard; Lot Finder; Styleboard Match; VR tours; Partner directory with “Match me”; Cost-to-Wait calculator; multi-locale (if needed).

O) Risks & Mitigations

73. **CMS item limits:** Monitor collection counts (Projects, Posts, Areas); choose plan accordingly; archive older posts to reduce clutter.

74. **Performance drift from heavy media:** Enforce asset specs; audit quarterly; lazy-load galleries; limit above-the-fold animations.

75. **SEO/crawlability with filters:** Ensure server-rendered list items; provide crawlable category/area pages; use descriptive URLs.

76. **Integration fragility:** Centralize automations in Make/Zapier with alerts; document payloads and field names in a shared spec.

15) Zapier Automation Blueprint (Webflow ↔ CRM/Apps)

15.1 Objectives

· Capture every highintent visitor with minimal friction.

· Qualify + route leads in under **60 seconds** from form submit.

· Maintain a clean, deduped CRM with full source attribution (UTMs, page, campaign).

· Create a reliable, observable automation layer (alerts, retries, error queues).

15.2 Systems in Scope

· **Source:** Webflow (Forms, CMS Collection triggers via webhooks)

· **Automation:** Zapier (Formatter, Paths/Filters, Code, Webhooks)

· **CRM (choose one):** HubSpot or Pipedrive (examples use HubSpot)

· **Comms:** Slack (#leads channel), Gmail/Outlook, optional Twilio SMS

· **Scheduling:** Calendly

· **Data lake (optional):** Google Sheets or Airtable for raw log

· **File/PDF (optional):** Documint/Documaker/CloudConvert for onthefly PDFs

15.3 Data Model & Field Map

Hidden fields on ALL Webflow forms (add as form fields with default values set by script):

- `utm_source`, `utm_medium`, `utm_campaign`, `utm_term`, `utm_content`
- `gclid`, `fbclid` (when present)
- `first_page_url`, `landing_page`, `current_page`, `referrer`
- `device`, `language`, `session_id`
- `lead_type` (consult, project_pdf, lot_check, readiness_quiz, share_with_partner)
- `service_area`, `budget_range`, `start_timeline` (where applicable)

CRM mapping (HubSpot example):

- Contact: email, first_name, last_name, phone, city, lead_source (derived), utm_*, gclid, lifecycle_stage = `marketingqualifiedlead` (conditional)
- Deal: pipeline = `New Business`, stage = `New Inquiry`, amount (blank), close_date (blank), associated contact, custom fields for budget_range, start_timeline, service_area, origin_page
- Timeline note: JSON dump of full form payload + page URL

Deduping rule: Always **Find or Create** contact by email. If contact exists, **Update** and append a timeline note. If no email (phoneonly), search by phone; else create with placeholder and task for followup.

15.4 Core Zaps (v1 Launch)

Zap 1 — Primary Lead Intake (Consult Short Form)

- **Trigger:** Webflow → *Form Submission* (form = `consult-short`)
- **Actions:**
    1. Formatter → Normalize phone; derive `lead_source` from UTM/referrer
    2. Paths:

§ **Path A (Qualified):** `budget_range` present AND `start_timeline` ≤ 6 months

  § HubSpot → *Find or Create Contact*

  § HubSpot → *Create Deal* + attach fields

  § Slack → Post rich summary (name, city, budget, timeline, source, page)

  § Gmail/Outlook → Send templated **“Thanks—book here”** email with Calendly link

  § Optional Twilio → SMS “We have openings this week—reply 1 to book”

§ **Path B (Nurture):** otherwise

  § HubSpot → *Find or Create Contact* (stage = Subscriber/Lead)

  § HubSpot → Task “Qualify within 24h”

  § Add to Google Sheet log

Zap 2 — “Send Me This Project as a PDF”

· **Trigger:** Webflow → Form (form = `project-lookbook`)

· **Actions:**

1. Documint/Documaker → Generate PDF with project images/stats
2. Gmail → Email the PDF + curated related projects
3. HubSpot → *Find/Create Contact* + timeline note with project slug
4. Slack → Notify with link to the exact project

Zap 3 — “Share with My Partner”

· **Trigger:** Webflow → Form (form = `share-with-partner`)

· **Actions:**

1. Gmail → Send branded email to partner with page link + 3 hero images
2. HubSpot → *Create/Update* a **secondary contact**; associate to same Household (use Company or custom object)
3. Slack → Notify thread under the original lead

Zap 4 — Lot Finder / “Check My Lot”

· **Trigger:** Webflow → Form (form = `lot-check`)

· **Actions:**

1. Formatter → Parse address; extract city/ZIP
2. HubSpot → Create Deal with label "Lot Evaluation"
3. Slack → @mention acquisitions with a Google Maps link
4. Gmail → Autoreply with **next steps** and request for any missing details

Zap 5 — Build Readiness Score (Quiz)

· **Trigger:** Webflow → Form (form = `readiness-quiz`)

· **Actions:**

1. Code by Zapier → Compute score 0–100 + segment (Lot/NoLot/ArchitectOnboard)
2. HubSpot → Update contact fields `readiness_score`, `segment`
3. Gmail → Send segmentspecific next steps; include Calendly link

Zap 6 — Journal Subscribe

· **Trigger:** Webflow → Form (form = `subscribe`)

· **Actions:** Add to Mailchimp/Brevo list; HubSpot contact with lifecycle `subscriber`; Slack confirmation

Zap 7 — Calendly BackSync

· **Trigger:** Calendly → *Invitee Created*

- **Actions:** Find/Update HubSpot contact; move Deal to `Meeting Scheduled`; post Slack confirmation with date/time

Zap 8 — Error & DeadLetter Queue

- **Trigger:** Zapier **Catch Hook** (from `onError` steps)
- **Actions:** Log to Google Sheet/Airtable + Slack @owner; autoretry rules; nightly summary email

Zap 9 — CMS New Project → Social Draft (optional)

- **Trigger:** Webflow → *New CMS Item* (Projects)
- **Actions:** Build a caption from fields; create a draft in Buffer/Later; Slack review link

Zap 10 — VR Tour Gate (formgated)

- **Trigger:** Webflow → Form (form = `vr-gate`)
- **Actions:** Email tour link; create/update CRM contact; tag `engaged_vr`

15.5 Naming, Versioning, Environments

- **Zap names:** `WF > CRM | [Form Name] | v1.0`
- **Folders:** `Production`, `Staging`, `Archive`
- **Env flags:** Add a hidden form field `environment`; filters prevent prod zaps from firing on staging
- **Changelogs:** Simple “Automations Changelog” CMS singleitem; log date, change, owner, link

15.6 Observability & KPIs

- Daily Slack digest: new leads, qualified count, booked, PDF sends, lot checks, failures
- Google Sheet/Airtable dashboard: lead volume by page/source/area; **leadtomeeting rate**; **meetingtoproposal rate**; time to first touch

15.7 Security, Privacy, Compliance

· Consent checkboxes for Email/SMS; store timestamp + IP

· CASL/GDPR/CCPA: provide unsubscribe links; respect region rules in Zap paths

· PII handling: avoid posting full PII in Slack; truncate phone/email in open channels

15.8 Implementation Steps (1–2 days)

1. Add hidden fields + UTM capture script to all forms (Webflow).
2. Connect Zapier apps (Webflow, HubSpot/Pipedrive, Gmail, Slack, Calendly).
3. Build Zaps 1–4 first; test with staging forms; turn on logging sheet.
4. Add Zaps 5–7; validate CRM stages and tasks.
5. Enable alerts + nightly digest; document in the Changelog.
6. Go live; monitor first 72 hours; tweak filters/paths.