Hamilton Business Technologies

HubSpot CRM Updated Timeline

Remaining Hours

135 hours

Timeline

5 weeks

Target Go-Live

November 21, 2025

Updated Project Timeline

⚠️ **Pending Decision**

The decision to NOT import historical marketing email activity data or sales email activity data is still pending final approval. This impacts historical engagement reporting and may affect lead scoring baselines.

ID	HOURS	WORKSTREAM	SUMMARY	APPROACH	ASSUMPTIONS
1	25	**Data Schema & CRM Configuration**	Collaborate with Hamilton team to align HubSpot schema with data warehouse structure. Configure Contacts, Companies, Deals with custom properties. Build custom objects: Revenue Billings and Tickets. Build association workflows.	→ Conduct collaborative working sessions with Hamilton team to map data warehouse schema to HubSpot objects → Prioritize standard objects (Contacts, Companies, Deals) before custom objects (Revenue Billings, Tickets) → Configure properties directly in production environment with stakeholder validation → Build association workflows to automatically link related records based on business logic	→ Up to 100 custom properties total across Contacts, Companies, and Deals → 2 custom objects (Revenue Billings, Tickets) with up to 25 properties each

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2	30	**Sales Playbooks & Enablement**	Review and expand existing 5 playbooks for sales discovery. Build cross-sell/upsell automation workflow with conditional logic based on current products/services owned.	→ Review and refine existing 5 playbooks with sales leadership input to ensure alignment with current sales methodology → Conduct additional working sessions to map cross-sell/upsell decision tree based on product/ service relationships → Build playbooks using HubSpot's native playbook tool with embedded property fields for data capture → Configure playbooks to write data to Company properties, which will fire automation workflows → Build automation workflows to create Solutions records (provider, end date, type) based on playbook data capture → Design recommendation workflow with conditional logic branches based on Company associations to Solutions → Create "Recommended Solutions" custom property on Company object to surface cross-sell/upsell opportunities → Configure automation to update recommendations when new solutions are added	→ Existing 5 playbooks (Managed IT, Phone Systems, Cybersecurity, Circuits, +1) require refinement only, not full rebuild → Cross-sell/upsell decision tree is based on deterministic logic, not machine learning (ML deferred to Phase 2) → Hamilton still needs to define product/service groupings that drive recommendation logic

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3	5	**Marketing Segments & Automation**	Build Active/Static Lists for segmentation by business line and lifecycle stage. Create re-engagement workflows for cold leads.	→ Build Active Lists using lifecycle stage, business line, and behavioral criteria for dynamic segmentation → Configure automated re-engagement campaigns triggered when leads go cold	→ Up to 10 business line segments will be created (as identified in discovery) → Re-engagement workflows target cold contacts with 2-3 touchpoint sequence → Maximum of 4 workflows, no custom code required
4	20	**Sales Lead Management**	Build lead temperature assignment based on lead creation events. Build time decay automation to cool leads after period of no engagement. Create automated temperature workflows (Hot/Warm/Cold) with color tag visualization.	→ Map lead creation events to temperature buckets based on intent level (e.g., "Contact Us" form = Hot, newsletter signup = Warm) → Build automation to assign initial temperature based on lead source and form type → Design time decay automation to reduce temperature after X days of no engagement activity → Build temperature workflows using event-based triggers rather than score thresholds → Configure temperature color tags to visually indicate lead priority in sales views	→ Lead temperature is assigned based on specific lead creation events, not cumulative scoring → Time decay cooling occurs after fixed period of inactivity (e.g., Hot→Warm after 14 days, Warm→Cold after 30 days) → Temperature thresholds (Hot/Warm/Cold) will be defined by sales team based on lead source intent levels

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5	10	**Reporting & Dashboards**	Deploy out-of-the-box HubSpot reports and dashboards for sales pipeline, marketing performance, and basic attribution.	→ Deploy HubSpot's native deal and pipeline reports for sales visibility → Configure standard lifecycle stage reporting for funnel analysis → Set up basic marketing campaign performance reports → Deploy OOTB attribution reports for channel and campaign tracking → Configure standard sales activity reports for rep performance visibility	→ All reporting uses HubSpot's out-of-the-box reports without customization → Standard HubSpot Lifecycle Stages are used (Lead, MQL, SQL, Opportunity, Customer) → No custom calculated properties or complex report logic required → Marketing attribution uses HubSpot's native multi-touch attribution model

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6	10	**Training & Go-Live**	Deliver comprehensive training sessions across all user roles and workstreams. Execute final QA and UAT across all workstreams.	→ Conduct live training sessions via Zoom with screen recording for on-demand access **Training Sessions by Day:** → **Monday, Nov 12:** Custom Objects Training with Tim & Dan (1 hour) - Revenue Billings and Tickets: creating records, associations, reporting → **Wednesday, Nov 14:** Sales Training (1 hour) - playbooks, cross-sell/upsell workflows, deal management, Train the Trainer for sales leaders → **Thursday, Nov 15:** Admin Training (1 hour) - user provisioning, teams management, data imports, permission changes → **Friday, Nov 16:** Marketing Training (1 hour) - campaign execution, list management, lead temperature, automation, workflows → **Monday, Nov 19:** Reporting & Dashboards Training (1 hour) - navigating reports, filtering, dashboard usage → Execute UAT scenarios with Hamilton super-users across all role types to validate configuration	→ 5 distinct training sessions delivered across all workstreams and user roles → Each training session is 1 hour including Q&A

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7	10	**Documentation**	Create comprehensive documentation for all custom configurations, workflows, and system architecture to support ongoing maintenance and future development.	→ Document all custom object schemas (Revenue Billings, Tickets) with property definitions and associations → Create workflow diagrams for cross-sell/upsell automation and lead temperature workflows → Document playbook configurations and Solutions record creation logic → Document all custom calculated properties and their formulas	→ Documentation delivered in shared format accessible to Hamilton team (Google Docs, Confluence, or similar) → Documentation includes both written descriptions and visual diagrams where helpful

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8	15	**Project Management**	Weekly status meetings and working sessions with Hamilton project team. Maintain issue log and track progress. Send weekly status reports. Coordinate scheduling between teams. Track hours by workstream.	→ Conduct weekly 30-minute status meetings with Hamilton project team to review progress, blockers, and upcoming milestones → Conduct weekly 1-hour working sessions with Hamilton team for collaborative problem-solving and decision-making → Maintain centralized issue log tracking open items, owners, due dates, and resolution status → Send weekly status reports summarizing completed work, in-progress items, upcoming deliverables, and risks/issues → Proactively communicate blockers and escalate to appropriate stakeholders when decisions are needed → Coordinate scheduling between Bayard Bradford team and Hamilton stakeholders for reviews, approvals, and training sessions → Track actual hours against budgeted hours by workstream to provide burn rate visibility	→ Weekly status meetings attended by Hamilton stakeholders (30 minutes each) → Weekly working sessions attended by Hamilton stakeholders (1 hour each) → Status reports delivered via email (not requiring formal document creation) → Scope changes require written approval before work begins

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9	10	**Contingency Buffer**	Reserved hours for unexpected complexity in data schema alignment, additional playbook requests, extended QA/UAT cycles, and additional training sessions.	→ Contingency hours allocated only after mutual agreement between Bayard Bradford and Hamilton project team → Contingency usage tracked separately from core workstream hours for budget transparency	→ Contingency allocation requires approval from Hamilton project sponsor → If contingency is exhausted, additional work requires formal change order → Contingency does not cover scope additions unrelated to defined workstreams (e.g., new integrations, additional Hubs) → Final contingency usage will be documented in project closeout report
CORE BUILD HOURS		125			
CONTINGENCY HOURS		10			
TOTAL PROJECT HOURS		135			