

BizDev Hubspot Stages

Updated July 2025

1

New Lead (Automated)

All inquiries from various channels enter the system as unassigned deals. Yulia & Stephy assign these deals to the respective Account Managers. All deals originating from strategic partners will be automatically assigned to the designated Account Manager.

2

Engaged (Manual)

The deal should be moved manually by the Account Manager if initial contact has been made, but the lead could not be qualified.

3

Qualified (Manual)

The Account Manager moves deals to this stage after answering qualifying questions.

4

Forecast Sent (Manual)

Deals are moved to this stage when the PDF forecast is uploaded and shared with the owner. This action triggers an email to the landlord containing the forecast.

One of the qualifying questions is "Inspection required?" — please ensure this is answered accurately.

5

Inspection to be Scheduled (Automatic)

The deal will automatically move to this stage once the Property Inspection Request form has been completed.

6

Inspection Scheduled (Automatic)

The deal moves to this stage once the inspection date has been confirmed and scheduled by the onboarding team.

7

Property Inspected (Automatic)

The deal will move to this stage under the following scenarios:
1) If "Inspection Required?" is answered **No**, the system will trigger a task to submit the Quotation Request.
2) Once the inspection has been completed by the Onboarding Team.

Note: If the Property Furnishing Agreement is marked for deduction and the **amount is AED 5,000 or above**, the agreement will not be generated immediately. Instead, a notification **will be sent to Vahan** for approval. **Once approved, you will need to return to the deal and regenerate the agreement.**

The Management Contract and Furnishing Agreement can be generated at this stage, or during the 'Contract Sent' stage if necessary.

8

Contract Sent (Automatic)

The deal will automatically move to this stage once the Management Contract has been sent to the owner.

At this point, the Account Manager must ensure that the **following documents have been uploaded:**

- Title Deed or Oqood
- Passport AND Emirates ID
- Latest DEWA Bill or Activation of Supply (if available at this stage)

9

Contract Signed (Automatic)

The deal will move to this stage once the Management Contract has been signed and stamped by the operator.

Note: The agreement will only be signed after all required documents have been uploaded and the accuracy of the agreement has been thoroughly verified.

Property Onboarding should be completed at this stage.

10

Final Closure (Automatic)

The deal will be moved to this stage once property onboarding has been submitted.

11

Closed Won (Manual - Stephy)

The deal will manually move here after the below have been verified:

1. Required Documents and Agreements

Ensure the following have been completed and uploaded to the system:

- Management Contract – Signed by both parties
- Onboarding Service Agreement – Signed and uploaded
- DEWA Green Bill or Activation of Supply Confirmation
- Title Deed
- Passport or Emirates ID
- No Objection Certificate (NOC)

2. Mandatory Conditions

Confirm that the following conditions have been fulfilled:

- **Keys and Access Cards:** Received and acknowledged by the Onboarding Coordinator
- **DET Permit:** Verified and obtained by the Owner Support Team
- **Owner Stay Restrictions:** Owner has agreed not to use the property during onboarding
- **Utility Credentials:** Complete details provided to the Onboarding Team
- **Utility Connection Accuracy:** Confirmed and matched to the correct property

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On Hold (Manual)

The deal can be moved here if it is on hold for various reasons, such as awaiting handover from the developer or if the existing tenant is scheduled to vacate after a few months.

13

Closed Lost (Manual)

If the deal did not meet certain requirements or the client did not proceed, please select the appropriate reason.