

KINGSMEDe · HUBSPOT

Investor Profiles in HubSpot

Setup brief for sign off

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■ The approach in one page

Four things get built:

- 1. An investor profile on the company record.** Every investor, whether that is a fund, a family office or a private individual investing through a trust, gets a company record in HubSpot carrying the full profile Glen listed.
- 2. The people linked to that profile.** Decision makers and other contacts sit as contacts associated to the investor company, with a label showing their role in the decision.
- 3. One Investor Interest deal pipeline.** A new deal pipeline in HubSpot, sitting alongside the existing leasing and tenancy pipelines, covering all capital raising activity. Each deal in it is an investor's interest in a raise, tagged to the relevant property or properties.
- 4. An investor dashboard.** A summary view for Andrew and the team covering where each investor is up to, which properties they have been shown and why investors have declined.

■ The investor company profile

Every field Glen listed, with the object it sits on, the format we recommend and what it holds.

Anything not on Glen's original list is marked **Added by us** in the definition, so it is clear what came from him and what came from us.

Identification and ownership

Property	Object level	Field type	Definition
Relationship type	Company and Contact	Multiple checkboxes	Added by us. Investor, Tenant, Vendor, Purchaser, Agent, Other. This is the tag that builds the investor database Glen asked for, and it lets a company be both an investor and a tenant without having to choose. Contacts already have Contact type in HubSpot, so we use that at contact level. There is no equivalent on companies, which is why this one is new.
Location	Company	Existing address fields	Street, city, state, postcode, country. Already in HubSpot, so we use them rather than create duplicates.
Company / contact owner	Company and Contact	Existing HubSpot fields	Who owns the investor relationship. These already exist in HubSpot, so nothing new is built.

How they invest

Property	Object level	Field type	Definition
Investor type	Company	Multiple checkboxes	Private Equity, Family Office, Institutional, Private. Multi select so an investor can sit in more than one, for example a family office that also invests through a private equity vehicle. Question 1.
Preferred investment type	Company	Multiple checkboxes	Private Credit, Equity, Joint Venture / Private Partnership, Fund, Syndicate. Confirmed as multi select.
Asset preferences	Company	Multiple checkboxes	Residential Land, Industrial, Office, Hotel, Built Form Development Projects, Retail. Held on the company rather than the contact, because it describes what the investing entity wants. Question 2.
Investment geographic preference	Company	Multiple checkboxes	Added by us. NSW, QLD, VIC, WA, SA, ACT, NT, TAS, Offshore.
Investment budget	Company	Currency	Added by us. The amount an investor will typically put into a single opportunity. Not the total invested with Kingsmede, which is separate.
Preferred hold period	Company	Dropdown	Added by us. Under 2 years, 2 to 5 years, 5 to 10 years, 10 years plus, No preference. How long capital can be tied up.

The asset class of any single opportunity is captured separately on the deal, so we can still see when an investor took something outside their stated preference.

Return requirements

Property	Object level	Field type	Definition
IRR hurdle	Company	Percentage	The internal rate of return the investor requires.
Multiple hurdle	Company	Number	The return multiple required, for example 1.8. Confirm whether this is the equity multiple, and we will name the field accordingly.
Minimum coupon or interest rate	Company	Percentage	The minimum rate the investor will accept.

Investment history

Property	Object level	Field type	Definition
Total capital invested with Kingsmede	Company	Currency	Loaded once from existing records, then kept up to date from committed raises. Question 3.
Total returns from Kingsmede	Company	Currency	Manual, updated by finance unless there is a report we can pull from. Question 3.

Glen's list also included **Current Kingsmede investments** and **Prior Kingsmede investments**, both as property tags. **We suggest not building these two fields.** The Investor Interest pipeline already holds this, so the profile shows the same history without a second list to keep updated.

What we learn from them

Property	Object level	Field type	Definition
Investor decision making process	Company	Long text	Who signs off, what the investment committee cycle looks like, how long a decision typically takes.
Deal breakers	Company	Multiple line text	What this investor will not do, in Glen's own words.

Two of Glen's items are not fields:

- **Feedback log:** the activity timeline already captures emails, meetings, calls and notes automatically once email and Teams are connected, and nothing gets overwritten. On top of that we suggest a smart property that reads the activity on the record and summarises it, so the latest position is visible without scrolling. Maddy raised this and Glen liked the idea. Question 8 is what tells us how to build it.
- **Recent reports sent:** we suggest not creating a property for this unless it turns out to be necessary. Investor briefs and reports attach to the record, and the activity timeline already shows what was sent and when. Question 4.

■ The people

Two situations to note:

1. **Investors who use a Kingsmede email address.** HubSpot groups contacts to companies by email domain by default, so these contacts would otherwise be pulled onto the Kingsmede company record. We will switch off automatic grouping for them at setup. After that it becomes a manual step for the Kingsmede team: whoever adds an investor contact on a kingsmede.com.au address needs to associate them to the correct investor company by hand. It is quick, but it is ongoing and it will not happen by itself.
1. **Private individuals and family investors without a company.** We still recommend creating a company record, named for the trust, the family or the individual.

■ The Investor Interest deal pipeline

Proposed stages

1. **Identified:** investor flagged as a fit for the opportunity, no contact yet.
2. **Initial conversation:** introduction made, interest being gauged.
3. **Brief sent:** investor brief or information memorandum issued.
4. **Under review:** investor doing their own due diligence, questions and further material going back and forth.
5. **Verbally committed:** investor has indicated they are in, amount indicated.
6. **Commitment documented:** signed subscription or equivalent.
7. **Closed won**
8. **Closed lost**

Fields on each opportunity

The stages above and the property fields below were **proposed by us**, since Glen's email did not cover this level. The declining and accepting reasons are from his list, held on the raise rather than on the company. All of it should be marked up freely.

Property	Object level	Field type	Definition
Investment properties presented	Deal	Multiple checkboxes	Every investment property put in front of the investor for this raise. This is how we handle Glen approaching one investor about twenty assets without creating twenty records.
Investment property committed to	Deal	Dropdown, one choice	Which one they actually took. Required before the deal can be marked Closed won, so we get a clean record of what was offered, taken and passed on.
Investment declining reason (dropdown)	Deal	Dropdown, one choice	Why the investor passed on this raise, from a set list so it can be reported on. Required before the deal can be marked Closed lost. Question 5.
Investment declining reason (textbox)	Deal	Multiple line text	The detail behind the dropdown, in Glen's own words.
Investment accepting reason (dropdown)	Deal	Dropdown, one choice	Why the investor committed to this raise. Required before the deal can be marked Closed won. Question 5.
Investment accepting reason (textbox)	Deal	Multiple line text	The detail behind the dropdown.

Property acquisitions

Glen raised a second pipeline for tracking acquisitions through due diligence, contract and settlement, and noted it sits apart from the investor work.

We suggest leaving this out of the current build. An acquisition is a project moving through stages rather than a sale, so it does not behave like a deal. Tracking it properly would mean creating another custom object, and we would rather hold off on that for now.

Views, visibility and reporting

Where the investor fields appear

On the company record, the investor fields sit in their own section. That is fine to leave visible across all companies.

On the deal record, the investment fields only appear in the Investor Interest pipeline, so the leasing and tenancy pipelines are unaffected.

The dashboard

A single dashboard for month end reporting and for Andrew. These are suggestions only. Glen to confirm the exact reports needed.

- Investor opportunities by pipeline stage, so the shape of the raise is visible at a glance

- Which investors have been shown each investment property, and which committed
- Reasons for declining, grouped, so patterns are visible rather than anecdotal
- Total capital invested and total returns, by investor
- Investors by type, asset preference, investment geography and investment budget, for targeting the next raise

■ What we need from Glen

These are the only things holding up the build. Marking up this list is enough, there is no need for a formal response.

- ☐ **1. Investor type.** Should an investor be able to sit in more than one category, for example both Family Office and Private Equity, or should it be a single choice?
- ☐ **2. Asset preferences.** Confirm these belong to the investor rather than to a specific opportunity. Is there anything missing from the six categories listed?
- ☐ **3. Total capital invested and total returns.** Where do these figures live today, who maintains them, and can we load the historic numbers from there?
- ☐ **4. Recent reports sent.** Do you want the actual documents attached to the record, or a simple tick list of which reports have gone out?
- ☐ **5. Decline and accept reasons.** Give us the main reasons investors decline, and the main reasons they say yes, so we can build both dropdowns. Anything unusual still goes in the textbox alongside.
- ☐ **6. The dashboard.** What are the five questions Andrew asks you most often about the investor pipeline?
- ☐ **7. Pipeline stages.** Do the eight stages in section 4 match how you and Brent talk about a raise? If not, give us your wording.
- ☐ **8. Feedback log.** What do you want the activity summary to tell you at a glance? And should it sit on each raise, on the investor profile, or both?