COLDWELL BANKER PRIME REALTY / DOMINICAN REPUBLIC

A workspace for *the brokerage.*

Bring buyers, listings and deals into one place, so your agents can see who owns the next action and you can follow each sale.



Marina Fairways, Cap Cana · Photograph by Coldwell Banker Prime Realty

Shall we start in your Cap Cana office on Tuesday, 1 December?

Fidel Ion will spend four weeks designing the workspace with your office, then lead the team through twelve build weeks. We'll start with a sale your agents know and follow it from the first enquiry to the commission receipt.

Budget / 3 **Sales funnel / 7** **Confirmation / 40**

ENGAGEMENT PROPOSAL / DECEMBER 2026 DESIGN & 2027 ROADMAP

Proposal contents

Use this guide to find the budget, see how your team would handle a sale, or review the design and build schedule. Select a chapter or topic to open it.

01 Engagement & investment — 03–05

Budget · Technology allowances · Tax by line item

02 The brokerage sales process — 06–09

Current workflow · Full funnel · Stage walkthroughs

03 The Coldwell Banker brokerage experience — 10–14

Leads · Development inventory · Deal Room · Outreach · Buyer intelligence

04 Design & team formation — 15–20

December sessions · Design example · Architecture · Zoho · Spectre · Team

05 The implementation horizon — 21–34

Horizon 1 · Three aims & twelve proposed weekly reviews

06 Future horizons & AI enablement — 35–39

2027 roadmap · AI telephone agent · Voice costs · Sellers · Affiliates

07 Engagement confirmation — 40

Scope, budget and start date

CHAPTER 01 / ENGAGEMENT & INVESTMENT

The engagement budget

The proposed ceiling for design and implementation is US$19,200. It covers Fidel's direction, both engineers and four months of technology. The first services payment is US$3,000 on 29 December, after you have reviewed the December design work.

US$19,200	US$3,000	US$0
Foundation budget ceiling	Fidel per four active weeks	Services due at kickoff

PROPOSED SERVICE BUDGET · US DOLLARS

Four-week period	Architecture & engineering direction	Engineering[1]	Total
Design · 1–28 Dec	$3,000	$0	$3,000
Build 1 · 5 Jan–1 Feb	$3,000	≤ $1,600	≤ $4,600
Build 2 · 2 Feb–1 Mar	$3,000	≤ $1,600	≤ $4,600
Build 3 · 2–29 Mar	$3,000	≤ $1,600	≤ $4,600
16 active weeks	**$12,000**	**≤ $4,800**	**≤ $16,800**

Fidel's retainer. US$3,000 after each four-week period. Payments fall on 29 December, 2 February, 2 March and 30 March. The 29 December–4 January interval carries no separate fee.

[1] Engineering. From January, the brokerage hires both engineers through Michael's existing Upwork client account, or a brokerage client account if needed. Upwork bills the brokerage each Monday for the previous week's logged hours. Fidel reviews the hours and invoices only for his retainer.

Allow up to US$400 per build week for both engineers together, including Upwork client and contract initiation fees. Each engineer may work up to 40 hours at up to US$5/hour. Fidel and Michael set hour limits that fit the allowance after fees.

> SERVICES AND TECHNOLOGY / UP TO US$19,200
>
> US$16,800 covers services and US$2,400 covers technology. Some expenditure may qualify for a business deduction. The budget assumes zero tax benefit. Your accountant can assess each line on page 5.

Technology detail › Tax by line item › Upwork weekly billing ›

CHAPTER 01 / ENGAGEMENT & INVESTMENT

Technology & supplier allowances

Eight named CRM users and four vendor billing months cover the December–March implementation. The amounts below set spending limits. Fidel confirms the supplier and rate before committing spend.

CRM licences — US$1,600

Zoho CRM Enterprise · 8 × US$50/month × 4 months. Eight named seats are the planning allowance. Michael and Fidel will confirm who needs access and how the engineers will configure it.

Hosting & storage — US$160

US$40/month × 4. A candidate is Cloudflare Workers (US$5/month minimum) for the front end and integrations, plus R2 storage, logs and backups within the allowance.

Voice, AI & messaging — US$400

Design and integration tests allow US$200 for minutes, US$100 for model use and US$100 for connections or messages. Live AI calls with buyers are a separately approved Horizon 2 activity.

Supplier connections — US$240

Allow up to US$160 for approved Spectre or export access and US$80 for connector or transfer charges. Actual fees depend on supplier terms.

Technology allowance	US$2,400

OPERATING BASIS

The model uses Zoho’s US monthly rate. Zoho publishes 99.9% monthly CRM uptime subject to exclusions. Classic support covers eight hours a day, five days a week, with an eight-hour initial response. Fidel’s team supports the custom screens and connections.

Existing Spectre, MLS and Microsoft subscriptions continue under the office’s arrangements. Later campaign volumes have a separate budget.

Zoho · published rates · CRM uptime SLA · Support plan · Hosting rates

CHAPTER 01 / ENGAGEMENT & INVESTMENT

Tax treatment by budget line

Potential Dominican income-tax treatment depends on how the brokerage uses each service. These are the classifications for the accountant to examine against the actual invoices.

Fidel Ion · Product Architect & Engineering Director · US$12,000

One retainer covers the product design, hiring and direction of both engineers, testing and release. Fidel records the work completed in each period so your external accountant can classify the invoice.

Engineering and Upwork fees · up to US$4,800

Allocate weekly Upwork hours by task and record platform fees separately. New functionality may require capitalisation. Qualifying research and experimentation may be expensed under Article 287(j) with DGII consent.

Zoho licences · US$1,600

A DGII ruling on overseas software acquisition or rental permits a possible business deduction when the software supports taxable income. Check the contract and invoice period.

Hosting & storage · up to US$160

Identify recurring hosting and backup charges used in operations. Separate any costs directly attributable to development of the software asset.

Voice, AI & messaging · up to US$400

Separate operational usage from development tests or documented experiments. Match the supplier usage statement to the business purpose.

Supplier connection fees · up to US$240

Separate recurring access charges from a one-off implementation cost. Confirm the provider, service period and treatment of setup charges.

INDUSTRIAL RESEARCH INCENTIVE

Articles 47–48 of Law 392-07 address withholding on specified foreign professional services for qualifying industrial businesses. Proindustria classification and DGII authorisation are relevant. Eligibility for this brokerage has not been established.

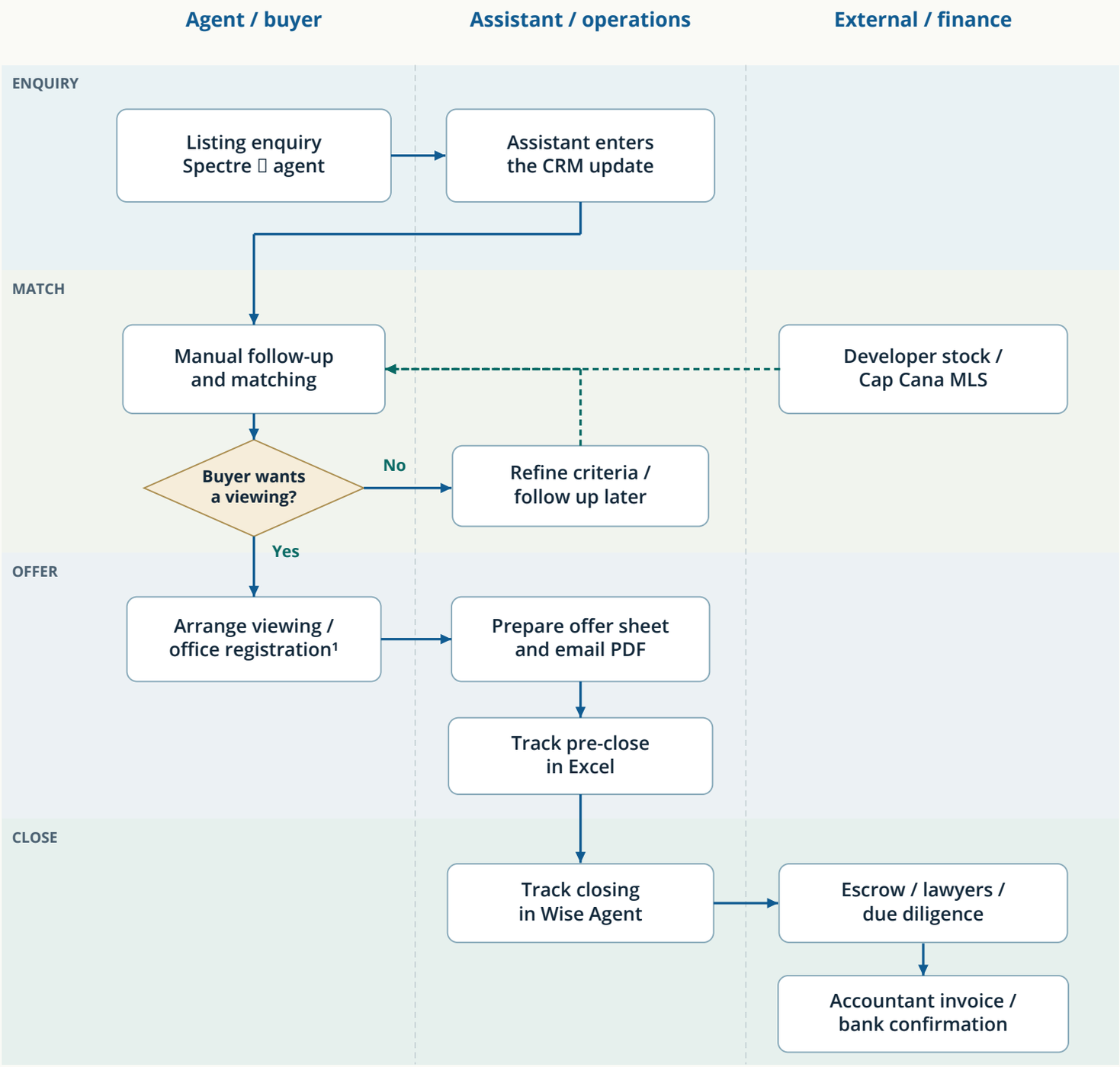
Any deduction affects taxable income. The US$19,200 planning figure includes no assumed tax saving. The accountant confirms any applicable invoice taxes or withholding for the entity and suppliers.

Tax Code · Art. 287(j) DGII · software ruling DGII · industrial authorisation

CHAPTER 02 / THE BROKERAGE SALES PROCESS

The brokerage workflow today

Today a Spectre enquiry, an agent's messages, developer inventory, Excel and Wise Agent each hold part of the sale. An assistant pieces them together. The diagram follows one buyer across those handoffs.



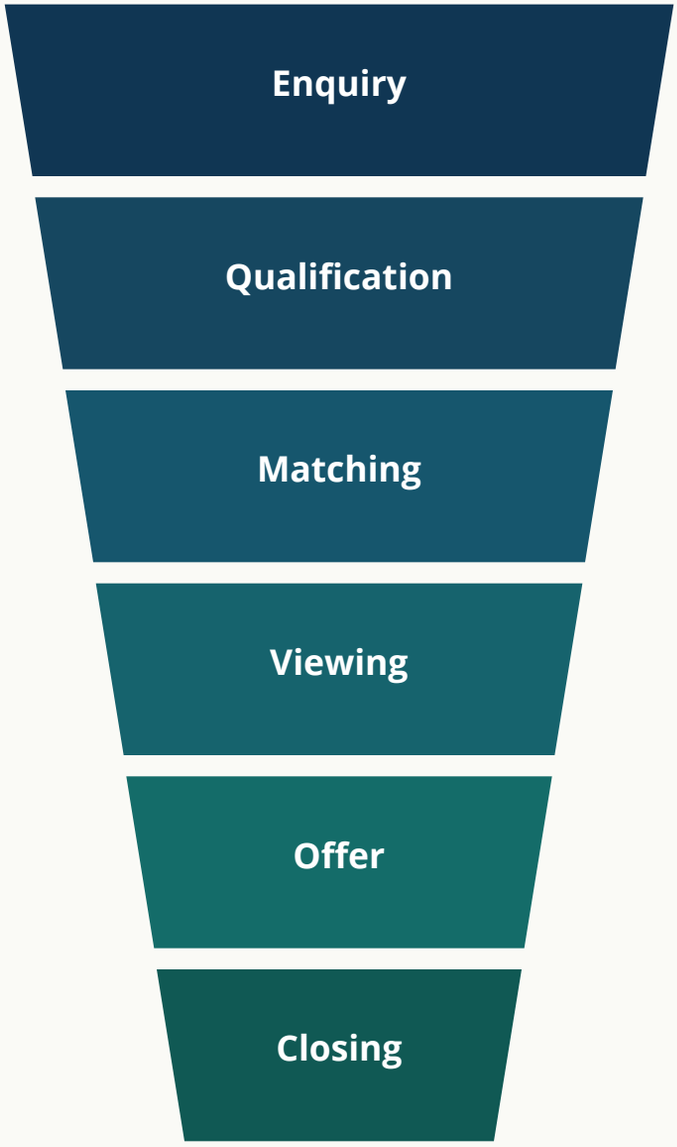
The first release carries the buyer and property forward, assigns the next action and updates the deal register as work happens. Agents make the calls. Assistants coordinate viewings and closing, and the external accountant confirms invoices and receipts.

[1] During design, the office confirms its registration rule and the order of escrow, due diligence, invoicing and settlement for resale and pre-construction.

CHAPTER 02 / THE BROKERAGE SALES PROCESS

The sales funnel in one view

The six stages below form one sales funnel. Each row names the record that moves forward and the person who picks it up. Select a screen name to see the proposed experience.



Leads Inbox

A named agent receives a buyer and source.

Buyer brief

The agent records budget, timing and preferences.

Development inventory

The agent shares a verified property shortlist.

Booking & outcome

The coordinator confirms the slot and next action.

Deal Room

The coordinator advances the offer with its evidence.

Commission ledger

The external accountant confirms receipts against each deal.

HOW TO READ THE NEXT PAGES

Pages 8–9 show what each person hands over at the six stages. Pages 10–14 show the agent screens and the deal register you can filter by date, source, buyer market and agent.

Funnel width represents progression through the sales process. Conversion rates will come from the brokerage's own records.

CHAPTER 02 / THE BROKERAGE SALES PROCESS

Enquiry, qualification & matching

The left-hand stages follow the buyer. Each one has a proposed Coldwell Banker screen, an action your team takes and an outcome the next person can use.

1 Enquiry



Give every enquiry an owner

A web or office enquiry enters the Leads Inbox with its source. A repeat submission returns to the same buyer. The desk owns any enquiry the routing rule cannot assign.

A buyer, a source and a named next action.

2 Qualification



Capture what makes a property a fit

Record budget and currency, location, bedrooms and timing. Your agent can return to that brief before the next call.

An agreed search brief and contact preference.

3 Matching



Build a shortlist from verified stock

Compare available units, photographs and floor plans. Confirm the price and availability with the developer before sharing the shortlist.

A shortlist that records exactly what was sent.

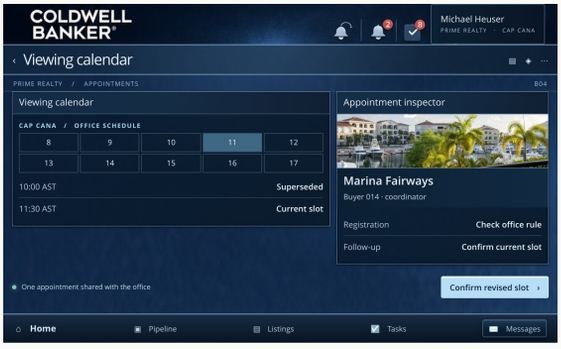
Proposed Coldwell Banker Prime Realty DR screens. Buyer activity, example units and balances are illustrative.

CHAPTER 02 / THE BROKERAGE SALES PROCESS

Viewings, offers & closing

After the buyer chooses a property, an assistant coordinates the viewing and offer. At closing, the external accountant confirms the invoice and receipt against the same deal.

4 Viewing

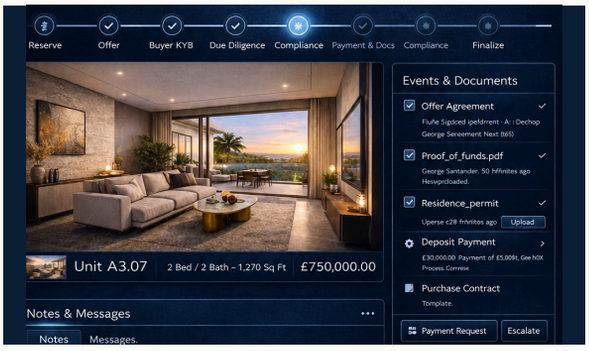


Keep one current appointment

Tie the buyer, property, agent and registration requirement to a single booking. A change updates the current slot and assigns the follow-up.

One appointment and an owner for the outcome.

5 Offer

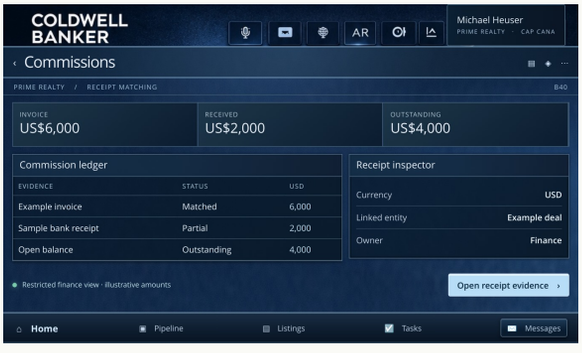


Pass a complete offer to the coordinator

Open the selected property and its evidence together. The required items depend on the sale type. An outstanding item has a named owner.

An offer ready to advance or a visible reason to hold.

6 Closing



Reconcile the deal to cash received

Link the invoice to its deal and match the bank evidence in the same currency. A partial receipt leaves the balance open.

A balance the external accountant can verify.

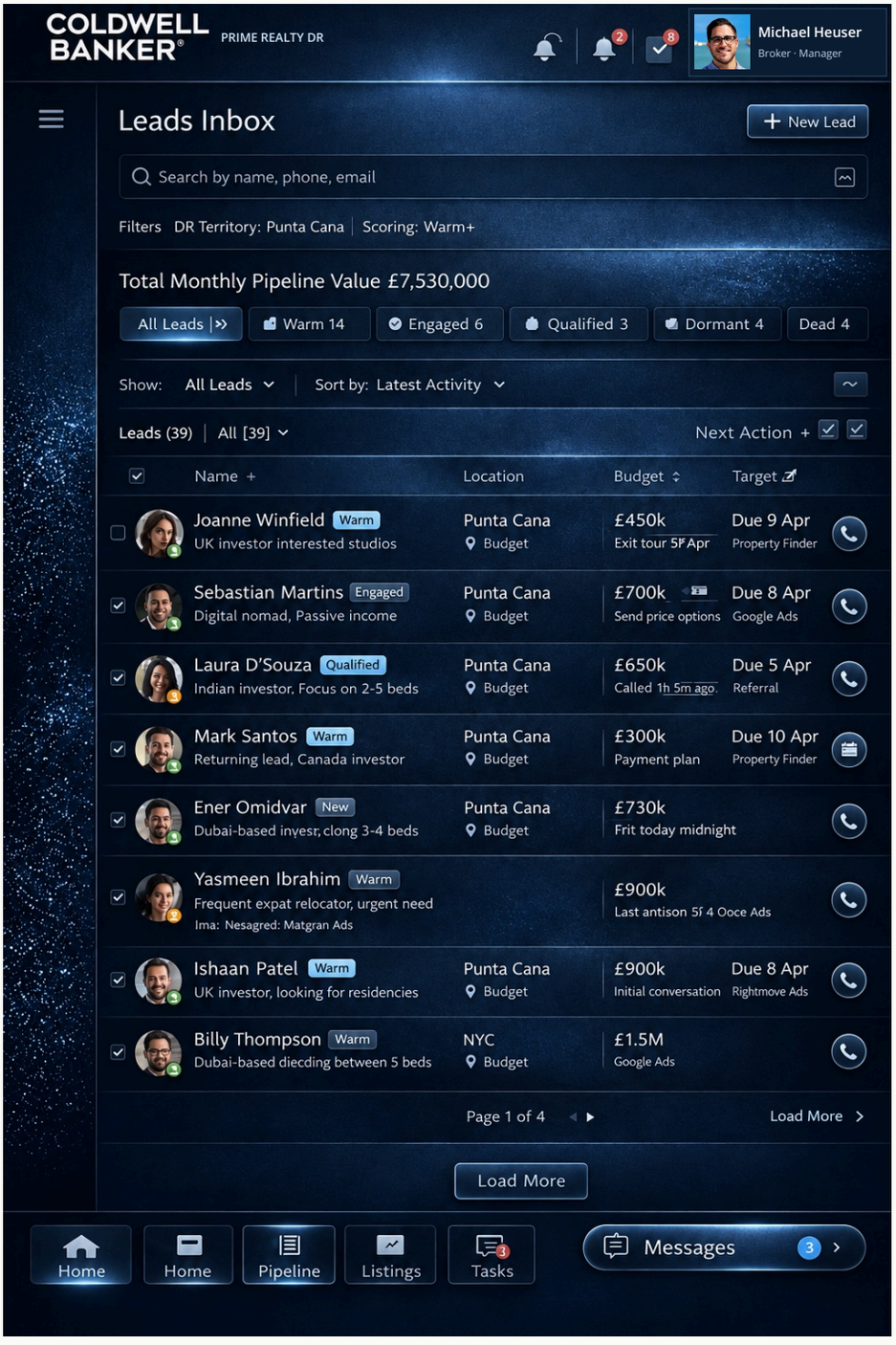
Proposed Coldwell Banker Prime Realty DR screens. Buyer activity, example units and balances are illustrative.

CHAPTER 03 / THE COLDWELL BANKER BROKERAGE EXPERIENCE

Leads Inbox

A buyer calls back. The agent can see who they are, what they want to spend and when to follow up, then call them directly from the same row.

SALES FUNNEL / ENQUIRY AND QUALIFICATION



Find the buyer

Search by name, phone or email. Filter the queue by territory, activity or lead status.

Read the row

The portrait, buyer brief, location, budget and target date sit together. The phone and message icons show the next action.

Return the call

Select the handset beside the buyer. In the first release the agent conducts the call and saves the outcome to the same record.

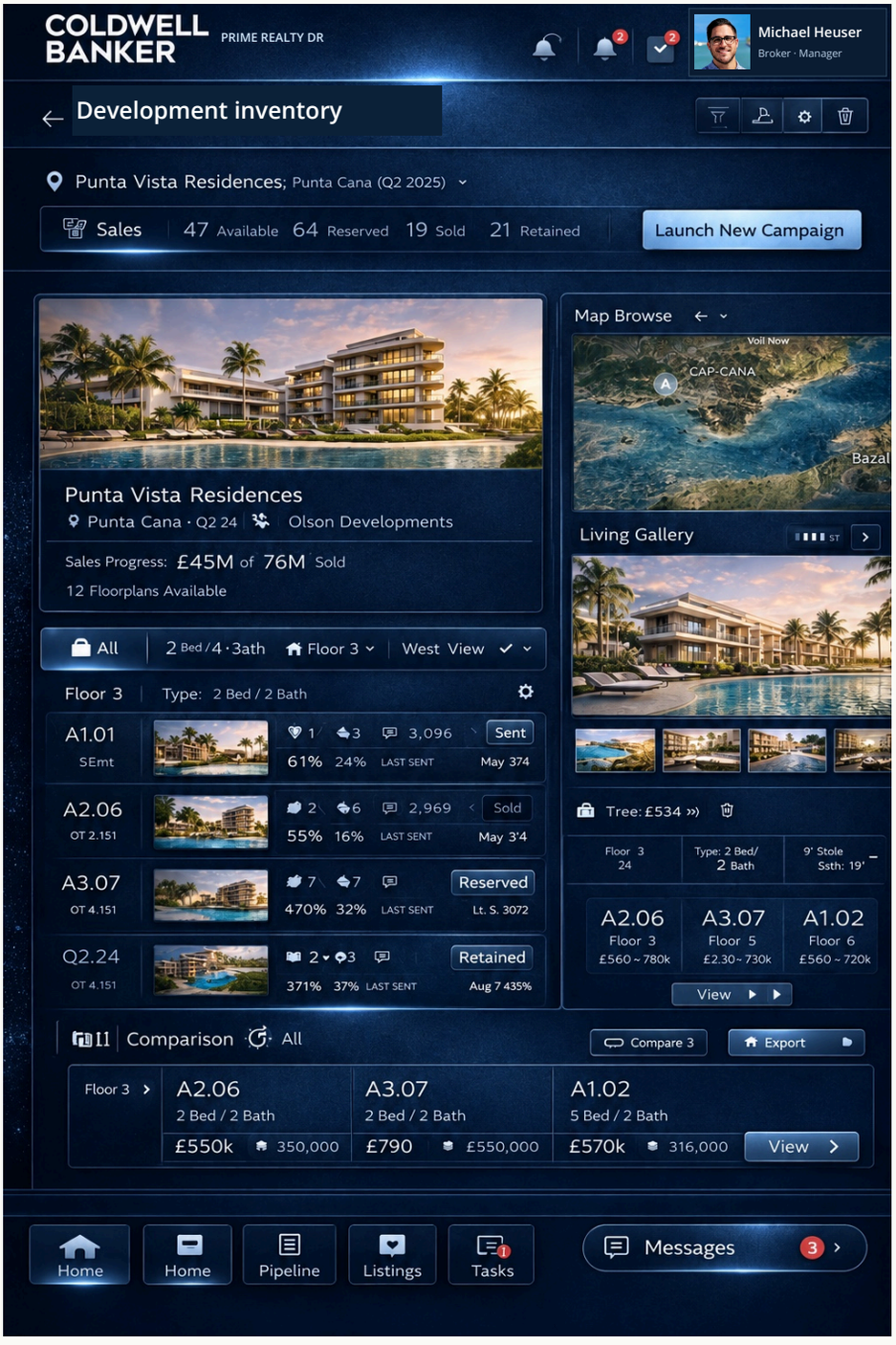
Coldwell Banker Prime Realty DR · Design preview with illustrative buyer, property and transaction data.

CHAPTER 03 / THE COLDWELL BANKER BROKERAGE EXPERIENCE

Development inventory

When a buyer asks what is available in a development, the agent opens its unit list. Prices, floor plans, photographs and the map are in view while the agent compares options.

SALES FUNNEL / MATCHING AND VIEWINGS



Choose a development

The header identifies the project. Its inventory summary shows how many units are available, reserved or sold.

Compare units

Filter by floor, bedrooms and view. Select units from the list and compare them below the gallery without leaving the project.

Make a shortlist

The agent confirms the current price and availability with the developer, sends the selected units and records the buyer's viewing request.

CAP CANA LISTING EXAMPLES

Marina Fairways · Prime Realty

Aquamarina · Prime Realty

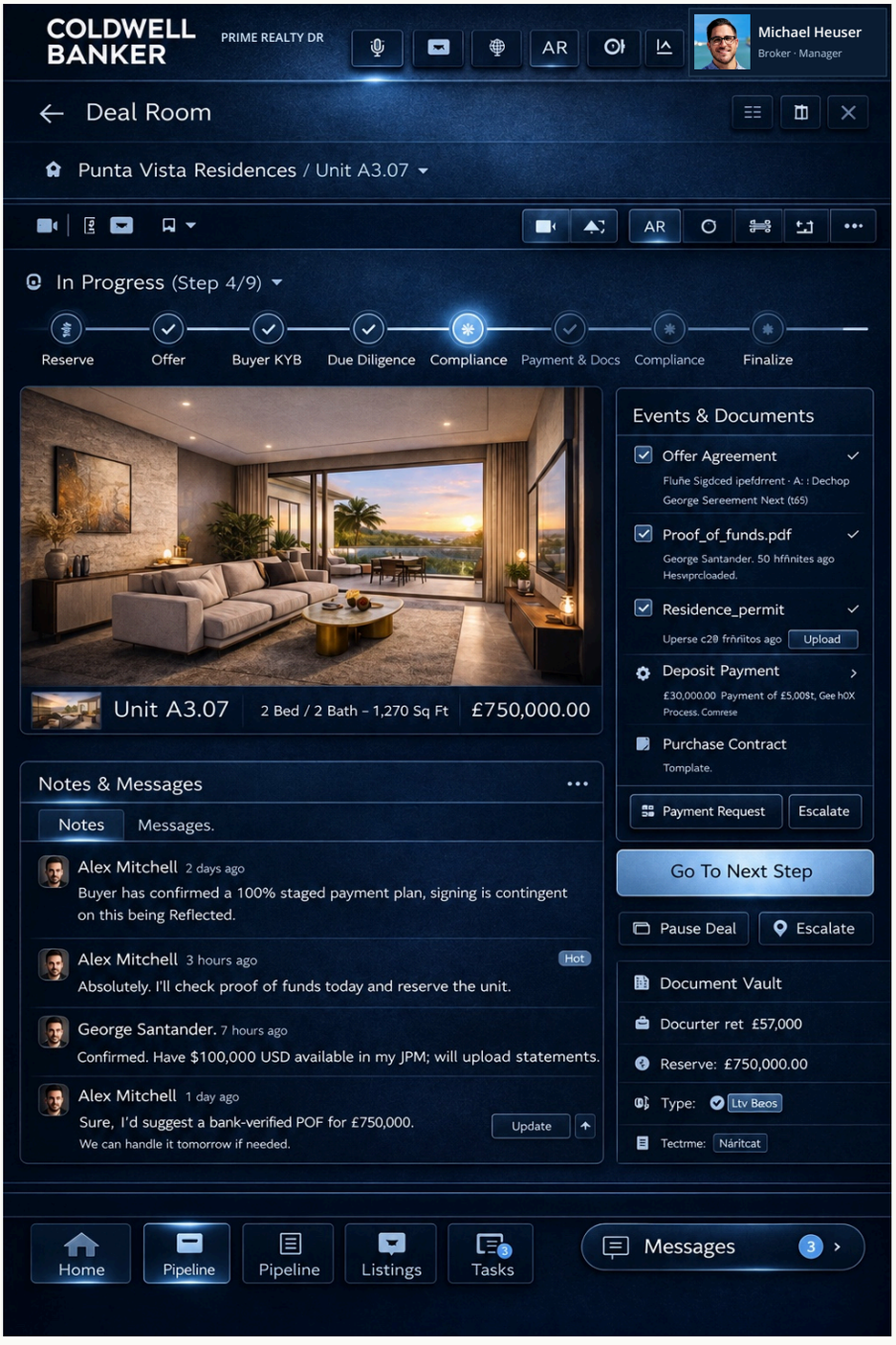
Coldwell Banker Prime Realty DR · Design preview with illustrative buyer, property and transaction data.

CHAPTER 03 / THE COLDWELL BANKER BROKERAGE EXPERIENCE

Deal Room

Once a buyer chooses a unit, the agent and assistant open the same deal. The selected property, offer, stage and supporting documents stay together through closing.

SALES FUNNEL / OFFER AND CLOSING



See the offer

The unit photograph and agreed price stay beside the stage tracker. Anyone joining the deal can see how far it has progressed.

Prepare the next step

The assistant checks the offer agreement, proof of funds and other documents required for this sale. Notes sit beside the checklist.

Record the close

The agent records the buyer's decision. The assistant links the invoice and payment confirmation supplied by the external accountant.

CAP CANA LISTING EXAMPLE

Marina Fairways · Prime Realty

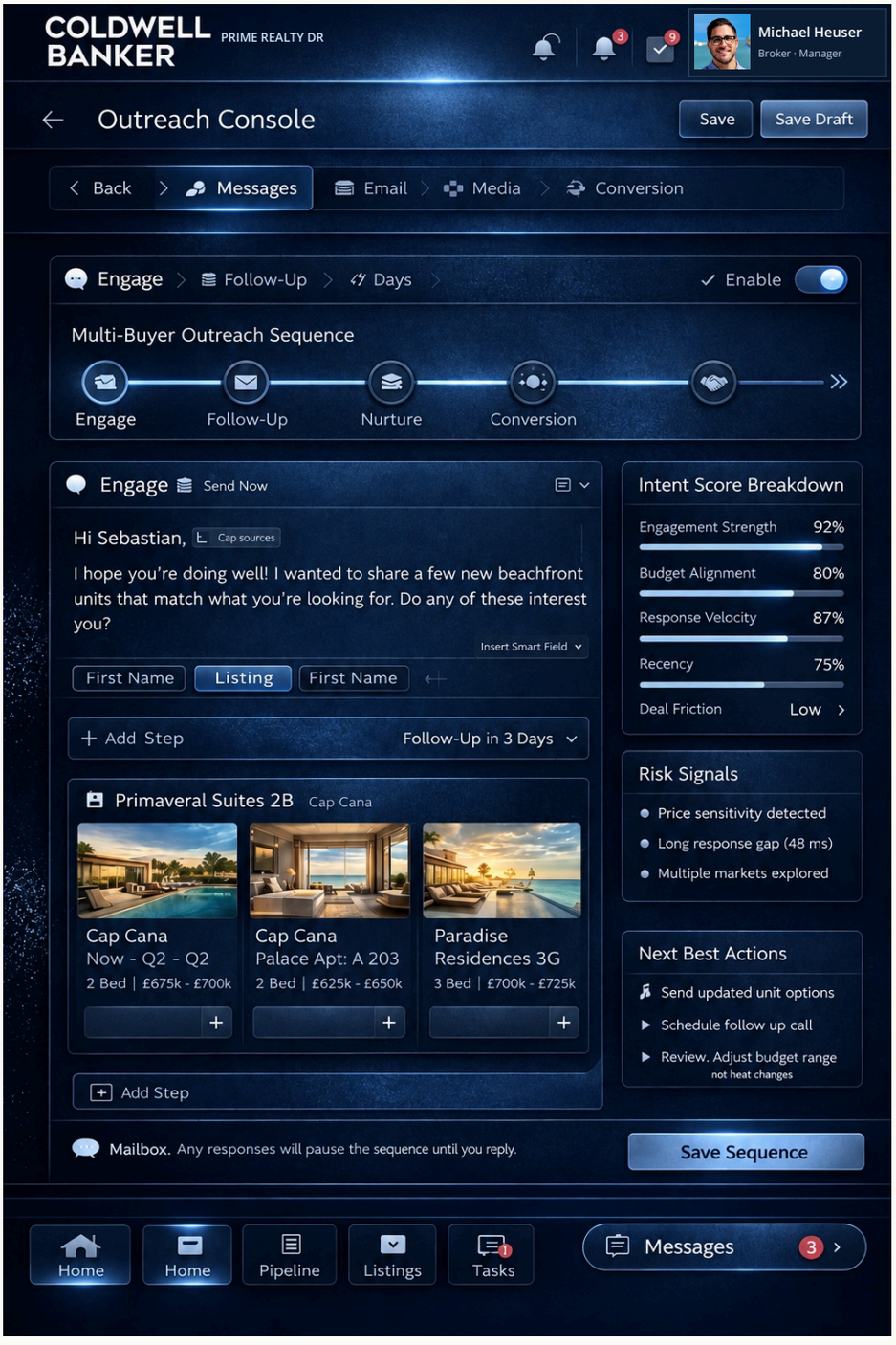
Coldwell Banker Prime Realty DR · Design preview with illustrative buyer, property and transaction data.

CHAPTER 03 / THE COLDWELL BANKER BROKERAGE EXPERIENCE

Outreach Console

An agent follows up with buyers who asked about similar properties. The message, listing cards and timing appear together, so the agent can check exactly what each buyer would receive.

SALES FUNNEL / FOLLOW-UP ACROSS THE FUNNEL



Choose the audience

The sequence shows each contact step. The side panel keeps the buyer's budget fit and recent interest in view.

Prepare the message

Add the buyer's name, select the listing cards and set the follow-up interval. The agent checks the facts and the contact preference.

Respond personally

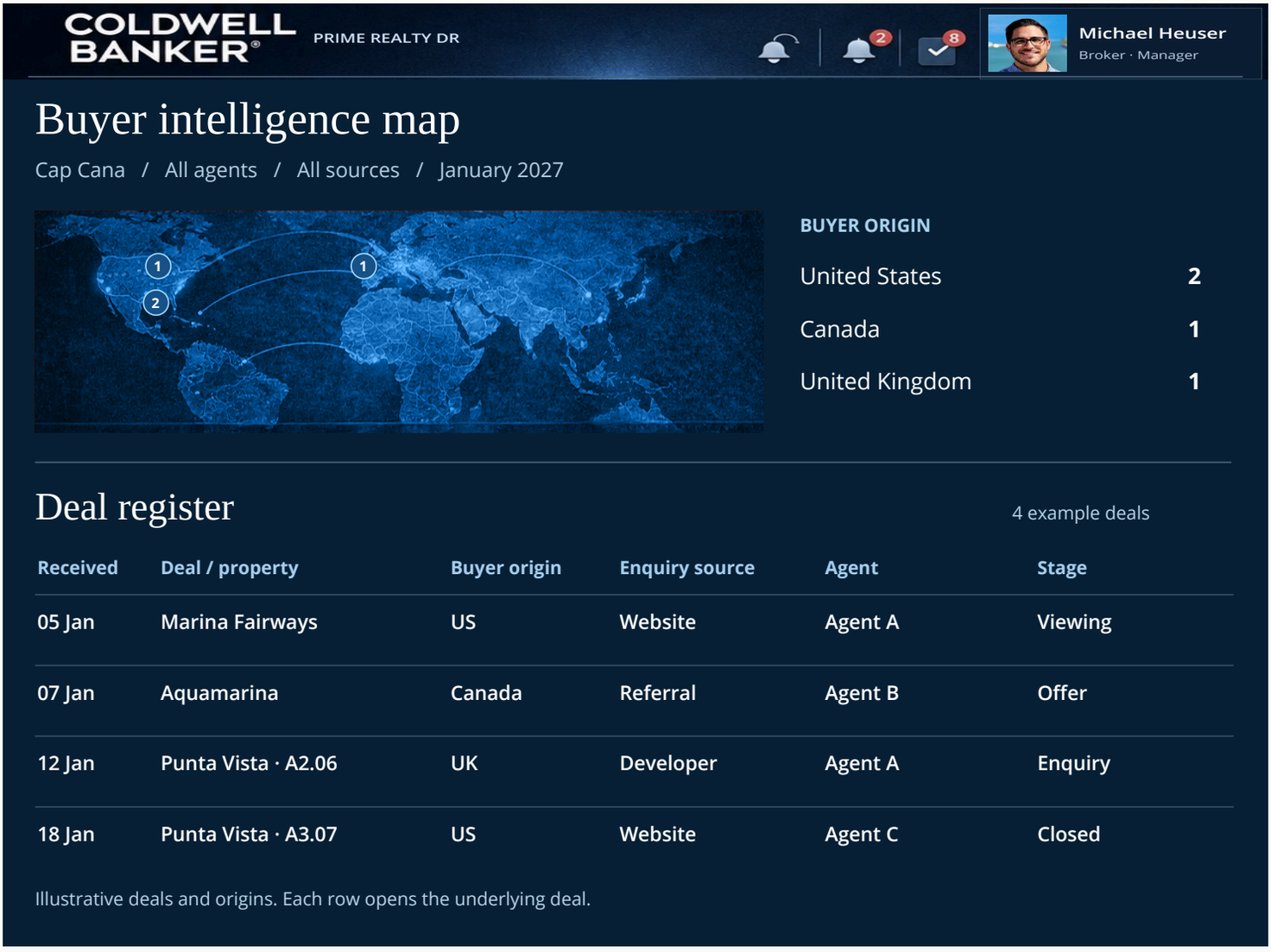
A reply pauses the sequence. The assigned agent picks up the conversation with the sent message and property details in view.

Coldwell Banker Prime Realty DR · Design preview with illustrative buyer, property and transaction data.

CHAPTER 03 / THE COLDWELL BANKER BROKERAGE EXPERIENCE

Buyer intelligence & the deal register

Michael's starting point is the Excel sheet he uses to see every deal. The proposed screen keeps that familiar register and adds a map showing where buyers come from.



What Michael can see in the sales meeting

Filter by date received, enquiry source or agent. The map gives the buyer's market of origin. The register shows how the buyer found the office, who owns the deal and which stage it reached.

THE MANAGEMENT QUESTION

Which sources brought us buyers who reached a viewing, made an offer or closed? Select a source or buyer market to inspect the deals behind its total.

CHAPTER 04 / DESIGN & TEAM FORMATION

The December design programme

Michael sets the priorities with Fidel. Agents and assistants join the session that covers their work. Fidel contacts the external accountant separately about invoices and receipts.

01 Walk through one actual sale

Tue 1 Dec 2026 · 2:00–3:00 pm AST · Cap Cana office

Michael opens his deal sheet. An agent shows where the enquiry arrived and an assistant shows how the viewing, offer and closing were recorded. Fidel traces each handoff.

A shared picture of today's process and the first tasks worth automating.

02 Follow the records back to their sources

Tue 8 Dec 2026 · 2:00–3:00 pm AST · Teams

An assistant shows the Spectre enquiry, developer stock file, Excel row and Wise Agent entry for a sample sale. Fidel checks which information each supplier can provide.

A list of the connections to test and the person who checks each source.

03 Try the proposed screens

Tue 15 Dec 2026 · 2:00–3:00 pm AST · Teams

An agent returns a call and compares two units. An assistant prepares a viewing. Michael checks that the new register answers the questions he asks of Excel.

Marked-up screens and the changes the office wants before building.

04 Choose the January starting point

Tue 22 Dec 2026 · 2:00–3:00 pm AST · Teams

Michael and Fidel review the designs, team selection, supplier answers and available budget. Work that needs more evidence stays visible for a later review.

First build priorities, a named team and a proposed weekly review calendar.

CHAPTER 04 / DESIGN & TEAM FORMATION

From Michael’s spreadsheet to one screen

During design, Fidel follows a deal that Michael already knows. The office can judge the proposed screen against the spreadsheet and conversations it uses today.

01 Michael opens the deal sheet

Choose a recent enquiry and point to the date it arrived, its source, the assigned agent and its current stage. Which columns does Michael actually use in the sales meeting?

02 The agent and assistant fill in the story

The agent shows the buyer conversation. The assistant shows where the viewing or offer was recorded and which details had to be copied back into Excel.

03 Fidel puts that sale on screen

The first mock-up shows the same row in the deal register. Opening it reveals the buyer brief, property, agent and latest activity. Michael can still filter by source or date.

04 The office tries the handoff

An assistant records a viewing against the sample deal. Michael opens the register and checks the stage, source and agent. Fidel notes any missing detail and brings the revised screen to review.

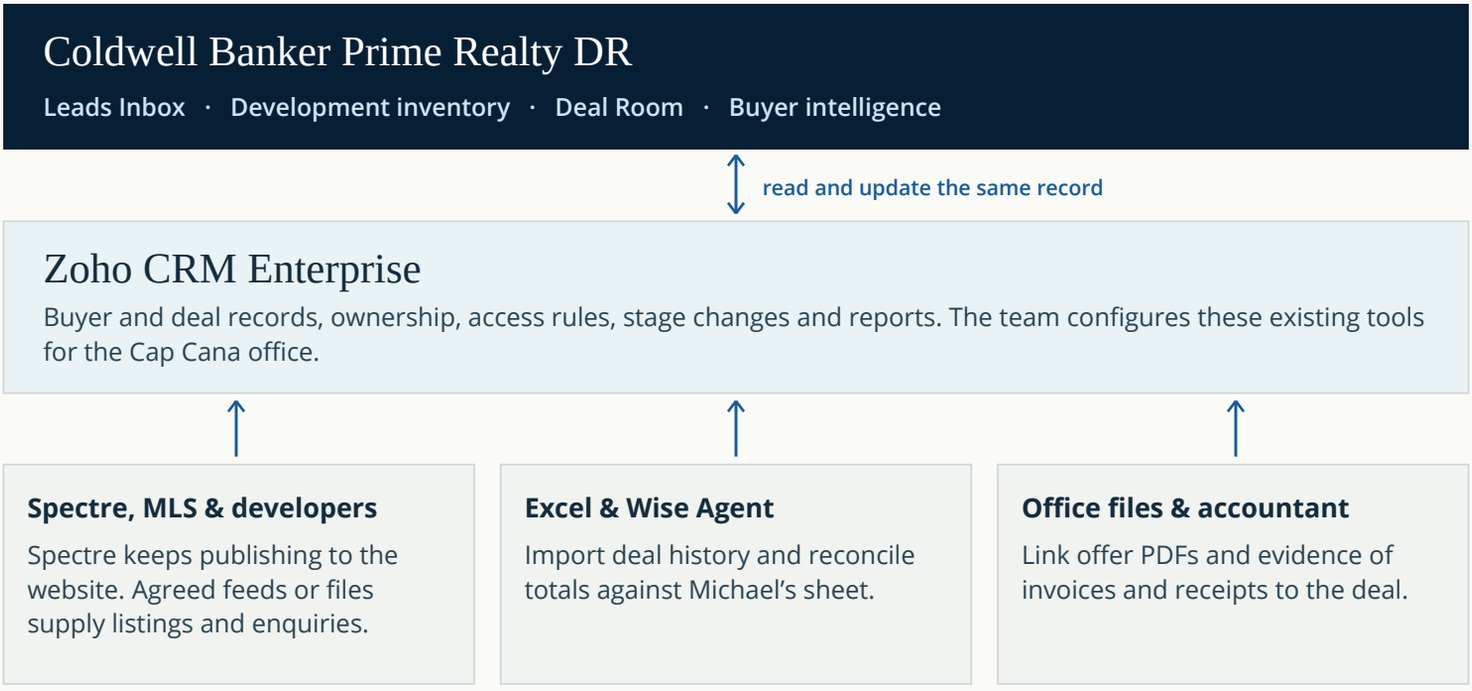
WHAT DECEMBER PRODUCES

A screen the office recognises, an example it can repeat and an agreed description of what the first build should do.

CHAPTER 04 / DESIGN & TEAM FORMATION

One place to run the brokerage

Michael asked for one place to manage the business. Agents, assistants and Michael open a Coldwell Banker screen designed around their work. Zoho supplies the records and workflows behind it.



What the team configures in Zoho

CRM & workflow rules	Keep one buyer record and automatically assign the next task when a deal changes.
Blueprint & Canvas	Blueprint sets the steps and information needed to advance a deal. Canvas gives staff and engineers configurable record views inside Zoho.
CRM reports & dashboards	Group deals by date, source, agent and stage. The custom front end uses those records to build Michael's register and buyer map.

If the office later needs separate apps, Zoho Books can handle invoicing and Zoho Analytics can combine reports. The foundation allowance covers CRM Enterprise.

WHY ZOHO

Zoho CRM commits to 99.9% monthly availability under its SLA, subject to exclusions. Zoho lists its cloud services within its ISO/IEC 27001 certification. Fidel's team operates the custom screens and tests each supplier connection.

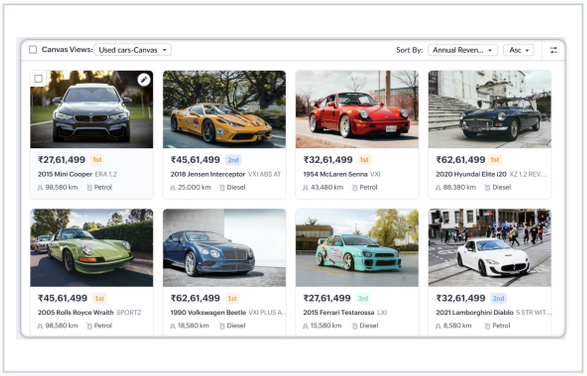
Zoho CRM uptime SLA · ISO certification scope · CRM workflow rules · Books · Analytics

CHAPTER 04 / DESIGN & TEAM FORMATION

Zoho configuration & custom engineering

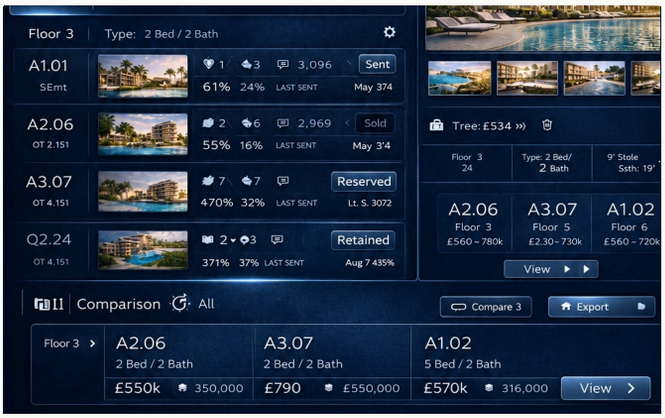
A listing comparison shows how the architecture works in practice. Zoho stores each unit and its last verified price. The Coldwell Banker screen lets an agent compare those units with the buyer's brief.

NATIVE ZOHO / CANVAS INVENTORY TILES



Zoho · Canvas design suite

PROPOSED DESIGN / LISTING COMPARISON



Cap Cana listing example · Prime Realty

NATIVE CAPABILITY

Records, views and controlled stages

CRM provides modules, views and record ownership. Canvas presents fields visually. Blueprint can require evidence before moving a deal to its next stage.

ZOHO ENGINEER

28 planned hours for listing comparison

Define the listing key, currency and verification state. Map the source fields and test what happens when a supplier sends a conflicting price.

FULL-STACK ENGINEER

36 planned hours for listing comparison

Build the branded comparison, show the source and last check, and stop an unverified price from entering a buyer's shortlist.

ENGINEERING ALLOWANCE ACROSS THE 12 BUILD WEEKS

The weekly plan allocates 364 Zoho hours and 398 full-stack hours. At US$5/hour, that is US$3,810 in labour. The US$4,800 allowance leaves US$990 for Upwork client fees and approved extra hours. Fidel reviews weekly usage with Michael before assigning extra work.

CHAPTER 04 / DESIGN & TEAM FORMATION

Spectre & listing continuity

Spectre feeds websites and supports listing enquiries. Keep those services working while the team proves how records can reach the new workspace. The supplier's terms and a working sample decide the route.

01 A supported connection

If Spectre permits the required access

Fidel asks the supplier to demonstrate which fields can be read or written, how quickly changes appear and what the connection costs. Staff see verified listing changes with a last-updated time.

02 Scheduled file exchange

If the supplier supports usable exports

Use an agreed file and refresh schedule. Match by stable identifiers. The listings owner sees which rows are out of date or failed to import. Conflicting prices wait for review.

03 A managed bridge

If neither route covers a critical field

Keep website publication in Spectre. An appointed owner confirms changes through a short exception queue or the supplier's approved manual route. Show the owner and verification time in the workspace.

YOUR DECISION AFTER SUPPLIER DISCOVERY

Once the engagement begins, Fidel meets Spectre and the listing/data owners with brokerage authorisation. He returns with the permitted fields, sample export or connection, refresh interval, owner, recurring price and effect on website publication.

A PRACTICAL ACCEPTANCE TEST

Change one sample unit's availability. Staff see the verified change or a named exception. Confirm website behaviour and compare the relevant source totals before retiring a spreadsheet or connection.

CHAPTER 04 / DESIGN & TEAM FORMATION

Your dedicated technology team

You set the priorities. Fidel Ion is Factory Internet's Product Architect & Engineering Director. He selects and directs the engineers and is responsible for the release. Your office contracts with them on Upwork, sees the hours logged and pays them directly.

Fidel Ion

Product Architect & Engineering Director

Leads requirements, design, supplier decisions, hiring, quality, releases and support. Brings you the working product, the spend and the decisions that need your judgement.

Zoho specialist

Up to 40 hours per build week

Configures records, roles, workflows, Blueprint and reporting. The December assessment uses a sample deal, approval rule and role-based access test.

Full-stack / integration engineer

Up to 40 hours per build week

Builds the approved branded screens and permitted data connections. The assessment is a small import that can be rerun and an error that a staff member can resolve.

THE OFFICE KEEPS CONTROL

The brokerage controls its accounts, data, access and exports. The agreement will set out rights to the commissioned work and the licences for pre-existing designs and third-party software. Staff use the complete workspace under the Coldwell Banker Prime Realty DR brand.

FROM DESIGN TO THE FIRST TWELVE BUILD WEEKS

Chapter 5 follows one task each week. It shows what staff would do, what each engineer would build and what Michael would see at the review. The December sessions will settle the weekly outputs. After launch, Fidel's team supports the office and proposes improvements in four-week cycles.

> **CONTINUING CAPACITY**
>
> The planning rate remains US$3,000 per four active weeks for Fidel, plus approved engineering up to US$1,600 at the same capacity. Continued cycles and usage have their own budget beyond the initial services budget.

CHAPTER 05 / THE IMPLEMENTATION HORIZON

Horizon 1 / Brokerage implementation

During Horizon 1, your agents take the calls, qualify buyers and confirm viewings. The workspace keeps the buyer brief, property, offer and receipt together. The next pages show how the team could build and review that experience week by week.

HORIZON 1 / 5 JANUARY – 29 MARCH 2027

12 build weeks | 3 four-week aims | 12 weekly focuses

AIM 1

Agent workspace

Weeks 1–4 / 5 Jan–1 Feb

Put approved buyer records, roles, mobile outcomes and routing in the hands of the sales desk.

A duplicate enquiry produces one buyer and one owned callback.

AIM 2

Connected sale

Weeks 5–8 / 2 Feb–1 Mar

Connect the shortlist to the viewing, offer evidence, invoice and receipt.

The external accountant can trace a part-payment to its invoice.

AIM 3

Production release

Weeks 9–12 / 2–29 Mar

Recover failed updates, test reviewed outreach, rehearse a sale and launch supported workflows.

Staff can trace one sale from enquiry to confirmed receipt.

HOW TO READ THE WEEKLY PLAN

In December, Michael and Fidel agree the January starting scope. The build then runs from 5 January to 29 March. Each page pairs one week's output with a practical test. At the following Tuesday review, staff try it and help decide the next step.

Open the review calendar and all twelve focus pages ›

CHAPTER 05 / THE IMPLEMENTATION HORIZON

Three aims, twelve weekly reviews

December is for agreeing priorities. The twelve build weeks below run from 5 January to 29 March 2027. Each row shows the work period and the following Tuesday's review. Select an output to see what your team will try.

Aim 1 / Give agents a working sales desk			5 Jan–1 Feb
01	Role-based start pages	5–11 Jan	Tue 12 Jan · Teams
02	Import and duplicate review	12–18 Jan	Tue 19 Jan · Teams
03	Mobile outcome and follow-up	19–25 Jan	Tue 26 Jan · Teams
04	Enquiry ownership and routing	26 Jan–1 Feb	Tue 2 Feb · Office / Q&A

Aim 2 / Connect the sale to finance			2 Feb–1 Mar
05	Verified listing comparison	2–8 Feb	Tue 9 Feb · Teams
06	Viewing schedule and changes	9–15 Feb	Tue 16 Feb · Teams
07	Offer evidence and stage control	16–22 Feb	Tue 23 Feb · Teams
08	Commission and receipt matching	23 Feb–1 Mar	Tue 2 Mar · Office / Q&A

Aim 3 / Launch the supported workspace			2–29 Mar
09	Exceptions and recovery	2–8 Mar	Tue 9 Mar · Teams
10	Reviewed outreach and replies	9–15 Mar	Tue 16 Mar · Teams
11	Office acceptance rehearsal	16–22 Mar	Tue 23 Mar · Teams
12	Release and continuing support	23–29 Mar	Tue 30 Mar · Office / Q&A

TUESDAY REVIEWS / 2:00–3:00 PM AST

Each Tuesday, staff try the previous week's output and Michael chooses any changes. Most reviews take place on Teams. After weeks 4, 8 and 12, meet in Cap Cana for the demonstration and strategy discussion. The final review is Tuesday, 30 March.

HORIZON 1 / AIM 1 OF 3 · AGENT WORKSPACE / BUILD WEEK 01 OF 12 / 5–11 JAN 2027

Role-based start pages

PROPOSED WEEKLY OUTPUT

Role-specific start pages with restricted access to commission details.

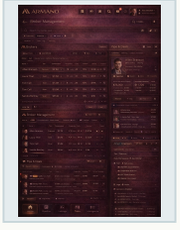
ZOHO / NATIVE FEATURE



Canvas record layout

Zoho product documentation

WORKSPACE DESIGN REFERENCE



A23 · Broker Management

COLDWELL BANKER / PROPOSED WORKFLOW



An agent sees assigned work while finance controls receipt access.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Configure roles, record visibility and field permissions.

Full-stack engineer · 32h

Build the agent start page and gated finance navigation.

ACCEPTANCE TEST

Open the same deal as an agent and as an authorised reviewer. Only the reviewer sees the restricted commission details.

REVIEW AFTER BUILD WEEK 1 / PROPOSED

Tue 12 Jan 2027 · 2:00–3:00 pm AST · Teams

Agent which records and details each person needs to see.

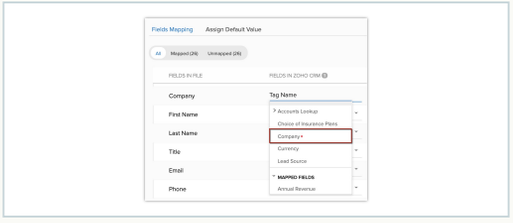
HORIZON 1 / AIM 1 OF 3 · AGENT WORKSPACE / BUILD WEEK 02 OF 12 / 12–18 JAN 2027

Import and duplicate review

PROPOSED WEEKLY OUTPUT

One buyer and one callback after a repeat import, with conflicts queued for review.

ZOHO / NATIVE FEATURE



Import field mapping

Zoho product documentation

WORKSPACE DESIGN REFERENCE



LST-A21 · Deduplication Review

COLDWELL BANKER / PROPOSED WORKFLOW



Keep one buyer and one open callback when the same source row arrives twice.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 36h

Map fields and unique keys. Configure repeat-import rules.

Full-stack engineer · 32h

Build the staging review and source-to-CRM reconciliation.

ACCEPTANCE TEST

Import the same approved sample twice. Source and destination counts reconcile and one buyer survives.

REVIEW AFTER BUILD WEEK 2 / PROPOSED

Tue 19 Jan 2027 · 2:00–3:00 pm AST · Teams

Choose the authoritative source when records disagree.

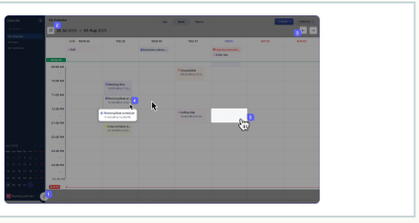
HORIZON 1 / AIM 1 OF 3 · AGENT WORKSPACE / BUILD WEEK 03 OF 12 / 19–25 JAN 2027

Mobile outcome and follow-up

PROPOSED WEEKLY OUTPUT

A mobile viewing outcome that creates one follow-up for the coordinator.

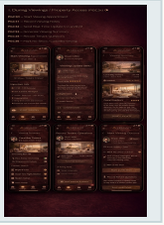
ZOHO / NATIVE FEATURE



Calendar activities

Zoho product documentation

WORKSPACE DESIGN REFERENCE



PGC31 · Viewing Notes

COLDWELL BANKER / PROPOSED WORKFLOW



One viewing outcome becomes one coordinator task.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 26h

Link the appointment, outcome and one follow-up task.

Full-stack engineer · 36h

Build the mobile outcome entry and office task preview.

ACCEPTANCE TEST

Save one outcome. The coordinator receives one task with the buyer, property, owner and due time.

REVIEW AFTER BUILD WEEK 3 / PROPOSED

Tue 26 Jan 2027 · 2:00–3:00 pm AST · Teams

Approve the minimum fields an agent must enter.

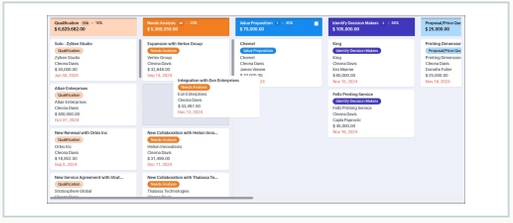
HORIZON 1 / AIM 1 OF 3 · AGENT WORKSPACE / BUILD WEEK 04 OF 12 / 26 JAN–1 FEB 2027

Enquiry ownership and routing

PROPOSED WEEKLY OUTPUT

An enquiry with a named owner and a fallback when the assigned agent is away.

ZOHO / NATIVE FEATURE



Pipeline board by stage

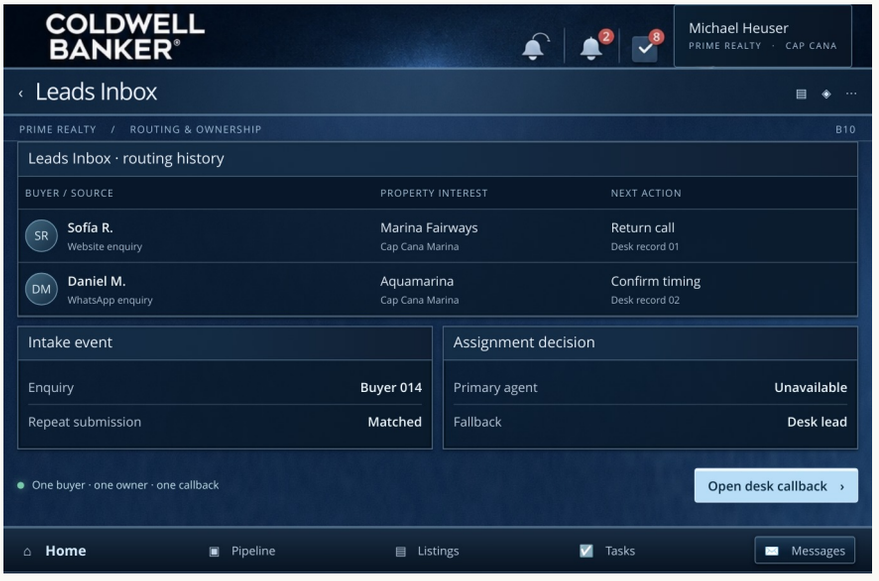
Zoho product documentation

WORKSPACE DESIGN REFERENCE



B10 · Leads Inbox

COLDWELL BANKER / PROPOSED WORKFLOW



The desk receives the callback when the primary agent is unavailable.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 32h

Configure source, owner, fallback rule and routing history.

Full-stack engineer · 32h

Connect the approved intake route and surface unassigned enquiries.

ACCEPTANCE TEST

Submit a new enquiry and a duplicate while the agent is away. The desk sees one fallback task.

REVIEW AFTER BUILD WEEK 4 / PROPOSED

Tue 2 Feb 2027 · 2:00–3:00 pm AST · Cap Cana office

Requirements Q&A · Which intake sources and fallback rules enter the implementation?

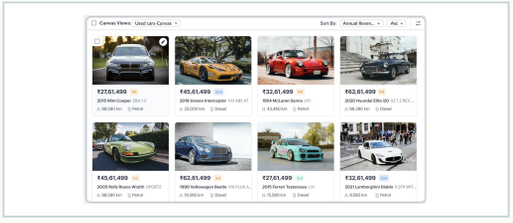
HORIZON 1 / AIM 2 OF 3 · CONNECTED SALE / BUILD WEEK 05 OF 12 / 2–8 FEB 2027

Verified listing comparison

PROPOSED WEEKLY OUTPUT

A shareable shortlist with the unit, verified price, currency and last check.

ZOHO / NATIVE FEATURE



Inventory tiles in Canvas

Zoho product documentation

WORKSPACE DESIGN REFERENCE



B20 · Dev Sales Workspace

COLDWELL BANKER / PROPOSED WORKFLOW



Two Cap Cana listings, with price and availability reviewed before sharing.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Define the property key, price, currency and verification state.

Full-stack engineer · 36h

Build the two-listing comparison and shortlist sharing check.

ACCEPTANCE TEST

Introduce a price conflict. Sharing pauses until the listings owner approves the correct figure.

REVIEW AFTER BUILD WEEK 5 / PROPOSED

Tue 9 Feb 2027 · 2:00–3:00 pm AST · Teams

Approve the source and freshness rule for each listing type.

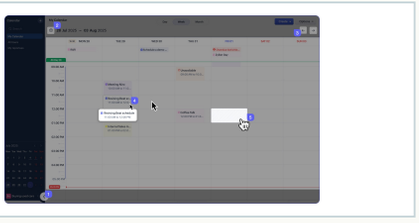
HORIZON 1 / AIM 2 OF 3 · CONNECTED SALE / BUILD WEEK 06 OF 12 / 9–15 FEB 2027

Viewing schedule and changes

PROPOSED WEEKLY OUTPUT

One current viewing slot and one follow-up when an appointment changes.

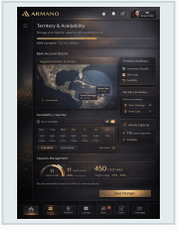
ZOHO / NATIVE FEATURE



Shared CRM calendar

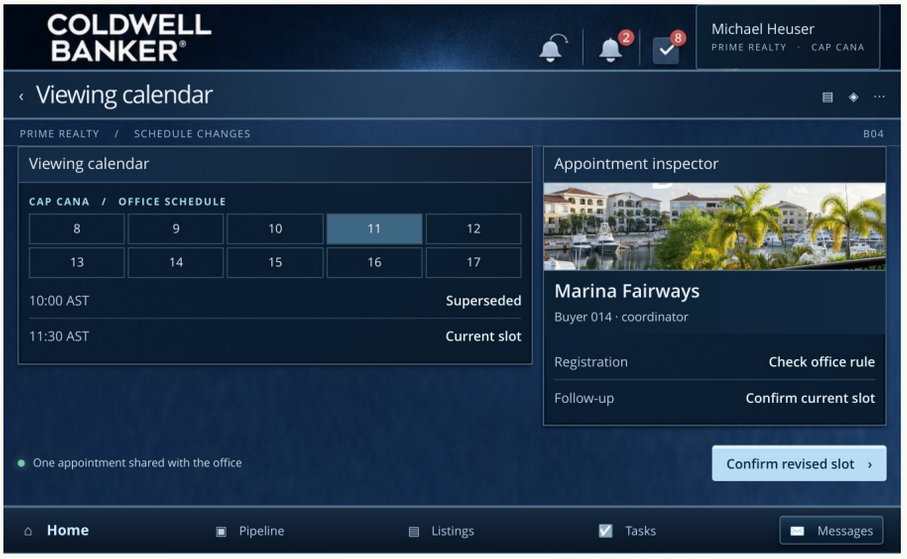
Zoho product documentation

WORKSPACE DESIGN REFERENCE



B04 · Territory & Availability

COLDWELL BANKER / PROPOSED WORKFLOW



The revised slot replaces the old appointment for all parties.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Define appointment ownership, registration and reminders.

Full-stack engineer · 30h

Build rescheduling and surface the current slot for both roles.

ACCEPTANCE TEST

Move one viewing. The old time is superseded, the right people are notified and one follow-up remains.

REVIEW AFTER BUILD WEEK 6 / PROPOSED

Tue 16 Feb 2027 · 2:00–3:00 pm AST · Teams

Decide when a booking counts as confirmed.

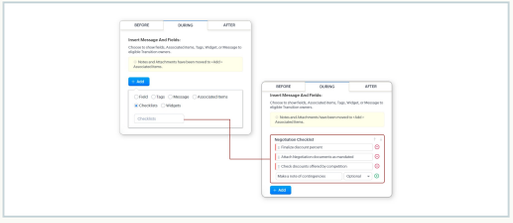
HORIZON 1 / AIM 2 OF 3 · CONNECTED SALE / BUILD WEEK 07 OF 12 / 16–22 FEB 2027

Offer evidence and stage control

PROPOSED WEEKLY OUTPUT

A sale-type checklist that identifies missing evidence and who can supply it.

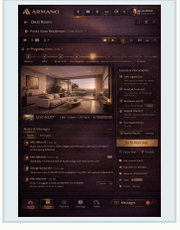
ZOHO / NATIVE FEATURE



Blueprint transition checklist

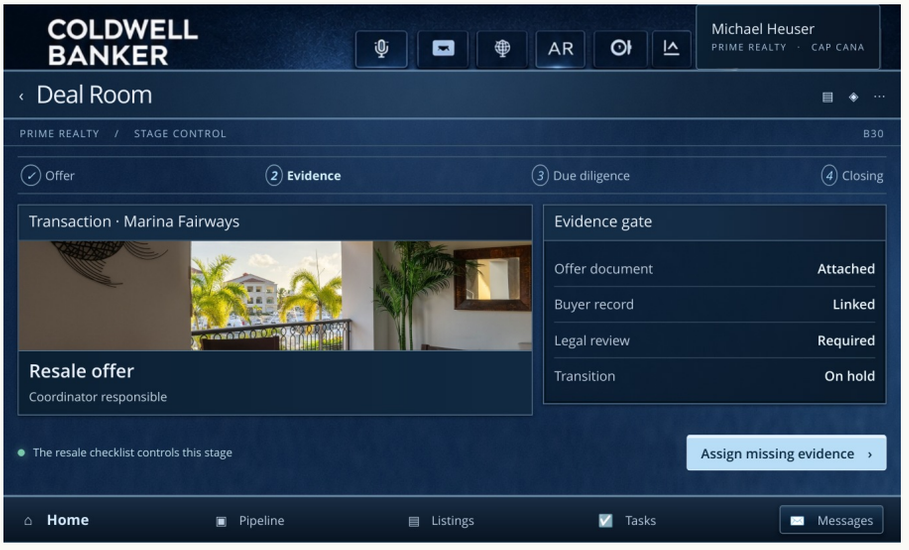
Zoho product documentation

WORKSPACE DESIGN REFERENCE



B30 · Deal Room

COLDWELL BANKER / PROPOSED WORKFLOW



Missing legal evidence holds the resale offer for the coordinator.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 34h

Configure sale types, required evidence and stage permissions.

Full-stack engineer · 34h

Build the evidence panel and show the person who can clear a hold.

ACCEPTANCE TEST

Withhold an item from each sale type. The stage holds until the authorised person supplies it.

REVIEW AFTER BUILD WEEK 7 / PROPOSED

Tue 23 Feb 2027 · 2:00–3:00 pm AST · Teams

Approve the evidence required for resale and pre-construction.

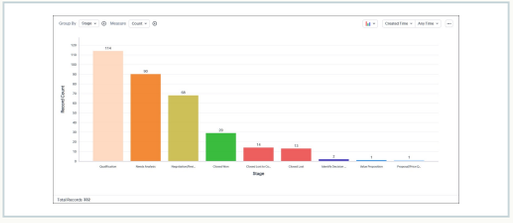
HORIZON 1 / AIM 2 OF 3 · CONNECTED SALE / BUILD WEEK 08 OF 12 / 23 FEB–1 MAR 2027

Commission and receipt matching

PROPOSED WEEKLY OUTPUT

A commission balance that shows the invoice, partial receipt and amount still due.

ZOHO / NATIVE FEATURE



CRM chart view

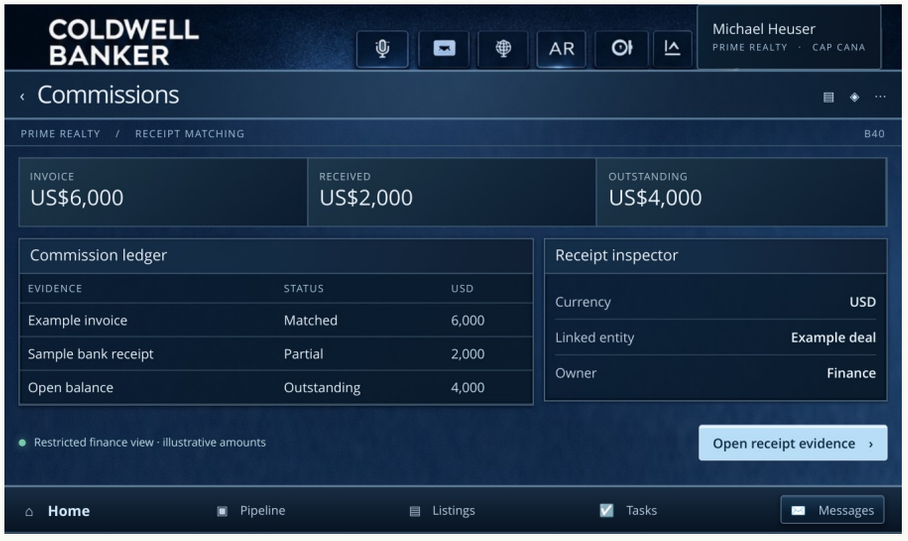
Zoho product documentation

WORKSPACE DESIGN REFERENCE



B40 · Commissions

COLDWELL BANKER / PROPOSED WORKFLOW



The open amount survives a partial payment in the original currency.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 36h

Configure deal, invoice, receipt and split records with access controls.

Full-stack engineer · 32h

Build the restricted reconciliation view and outstanding-balance drill-down.

ACCEPTANCE TEST

Match a sample partial receipt in its original currency. The remaining balance reconciles to the invoice.

REVIEW AFTER BUILD WEEK 8 / PROPOSED

Tue 2 Mar 2027 · 2:00–3:00 pm AST · Cap Cana office

Which splits and receipts should the external accountant confirm?

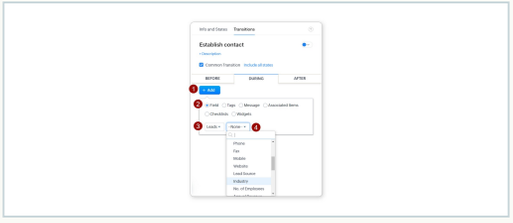
HORIZON 1 / AIM 3 OF 3 · PRODUCTION RELEASE / BUILD WEEK 09 OF 12 / 2–8 MAR 2027

Exceptions and recovery

PROPOSED WEEKLY OUTPUT

A recovery queue with a named owner and a repeatable import after a failure.

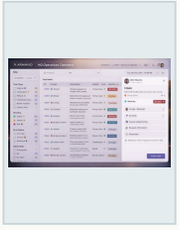
ZOHO / NATIVE FEATURE



Required process fields

Zoho product documentation

WORKSPACE DESIGN REFERENCE



PGA06 · Operations Command

COLDWELL BANKER / PROPOSED WORKFLOW



The listing owner can resolve the conflict from one record.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Configure exception ownership, recovery state and audit fields.

Full-stack engineer · 36h

Build the review queue and a repeatable refresh with reconciliation.

ACCEPTANCE TEST

Interrupt a feed and repeat the import. The last verified facts remain visible and the owner can recover it.

REVIEW AFTER BUILD WEEK 9 / PROPOSED

Tue 9 Mar 2027 · 2:00–3:00 pm AST · Teams

Assign one responsible person to each exception type.

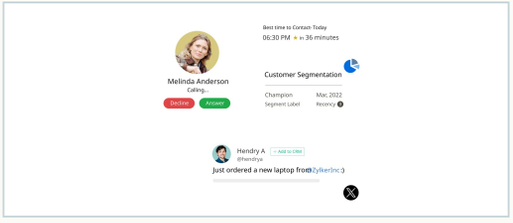
HORIZON 1 / AIM 3 OF 3 · PRODUCTION RELEASE / BUILD WEEK 10 OF 12 / 9–15 MAR 2027

Reviewed outreach and replies

PROPOSED WEEKLY OUTPUT

A reviewed message sequence that pauses when the buyer replies.

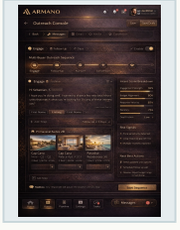
ZOHO / NATIVE FEATURE



Native CRM communications

Zoho product documentation

WORKSPACE DESIGN REFERENCE



B12 · Outreach Console

COLDWELL BANKER / PROPOSED WORKFLOW



A buyer reply pauses the scheduled follow-up.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Configure the buyer history, review state and pause-on-reply event.

Full-stack engineer · 34h

Build the draft review, channel adapter and assigned-agent task.

ACCEPTANCE TEST

Test an unknown price and a buyer reply. The draft returns to the agent and future steps pause.

REVIEW AFTER BUILD WEEK 10 / PROPOSED

Tue 16 Mar 2027 · 2:00–3:00 pm AST · Teams

Choose the channel and controlled release messages the office will approve.

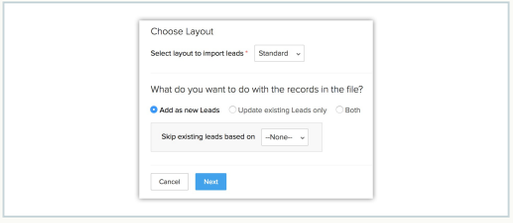
HORIZON 1 / AIM 3 OF 3 · PRODUCTION RELEASE / BUILD WEEK 11 OF 12 / 16–22 MAR 2027

Office acceptance rehearsal

PROPOSED WEEKLY OUTPUT

An office rehearsal from enquiry to receipt, with results checked against an export.

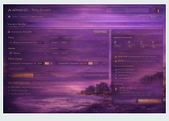
ZOHO / NATIVE FEATURE



Repeat-import handling

Zoho product documentation

WORKSPACE DESIGN REFERENCE



PGA81 · Policy Simulator

COLDWELL BANKER / PROPOSED WORKFLOW



Office staff can link a failed acceptance test to a named retest.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 32h

Reconcile sample CRM stages and finance totals with their sources.

Full-stack engineer · 32h

Run the end-to-end tests, export and recovery rehearsal with staff.

ACCEPTANCE TEST

An agent and assistant trace a sale from enquiry to closing. The external accountant checks its receipt total against the export.

REVIEW AFTER BUILD WEEK 11 / PROPOSED

Tue 23 Mar 2027 · 2:00–3:00 pm AST · Teams

Accept the evidence or assign a correction with a retest date.

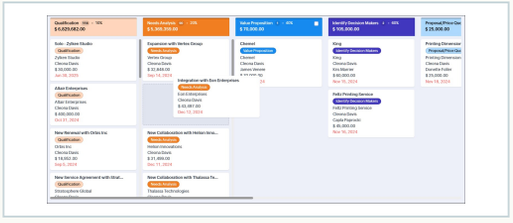
HORIZON 1 / AIM 3 OF 3 · PRODUCTION RELEASE / BUILD WEEK 12 OF 12 / 23–29 MAR 2027

Release and continuing support

PROPOSED WEEKLY OUTPUT

A release decision for each workflow, a support owner and the next four weeks of work.

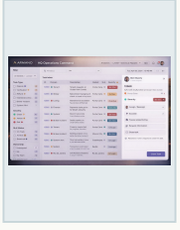
ZOHO / NATIVE FEATURE



Operational pipeline board

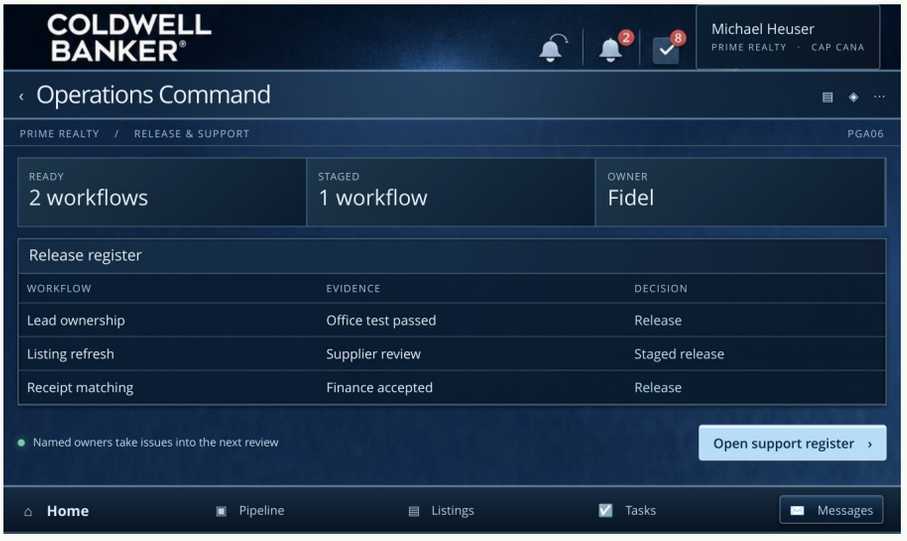
Zoho product documentation

WORKSPACE DESIGN REFERENCE



PGA06 · Operations Command

COLDWELL BANKER / PROPOSED WORKFLOW



Fidel takes each released workflow and open issue into support.

ENGINEERING WORK / PLANNED HOURS

Zoho engineer · 28h

Publish approved configurations, support ownership and reports.

Full-stack engineer · 32h

Release approved screens, monitor exceptions and cost the next work.

ACCEPTANCE TEST

Choose release, staged release or defer for each workflow. Give each open item an owner and review date.

REVIEW AFTER BUILD WEEK 12 / PROPOSED

Tue 30 Mar 2027 · 2:00–3:00 pm AST · Cap Cana office

Requirements Q&A · Confirm launch scope and the next four-week aim.

CHAPTER 06 / FUTURE HORIZONS & AI ENABLEMENT

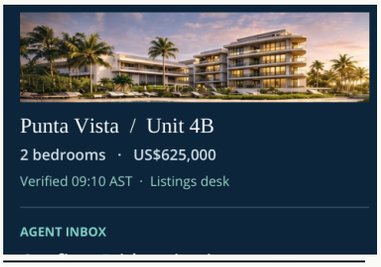
After March, what could your team build next?

By March, Cap Cana could have its own product team, a working brokerage system and a weekly habit of improving it. Keep that team together and Prime Realty can develop technology around its own sales opportunities. The first opportunity is the buyer who calls while an agent is at a viewing.

HORIZON 1 / 5 JANUARY – 29 MARCH 2027 / FOUNDATION

Your agents take the calls, qualify buyers and confirm viewings. The system records who owns the next action.

HORIZON 2 / 30 MAR – 21 JUN



Open horizon ›

Live buyer qualification

01 Connect a brokerage telephone number and verified listing answers.

02 Qualify intent and hand a viewing request to a named agent.

03 Nurture by authorised channels and measure confirmed viewings.

HORIZON 3 / 22 JUN – 13 SEP



Open horizon ›

Seller acquisition

01 Capture owner enquiries and prepare the valuation appointment.

02 Compose the mandate and track the signed instruction.

03 Publish approved listings and trace the resulting buyer enquiries.

HORIZON 4 / 14 SEP – 6 DEC



Open horizon ›

Affiliate operations

01 Configure office-specific permissions, ownership and measures.

02 Compare office funnels and reconcile eligible commission receipts.

03 Review exceptions and extend proven workflows to the next office.

7–31 DECEMBER 2027 / YEAR-END REVIEW

Use confirmed viewings, signed seller instructions and office adoption to choose the next investment. The US$19,200 ceiling covers design and Horizon 1. Each later horizon has its own approval and budget.

HORIZON 2 / 30 MARCH – 21 JUNE 2027 / PROPOSED PILOT

Horizon 2 / Live buyer qualification

The café demo answered from property PDFs. On the brokerage number, a buyer could ask about a specific unit, check that it fits their brief and ask the listing agent for a viewing in the same call.

PROPOSED WORKSPACE / ILLUSTRATIVE BUYER, UNIT AND PRICING

COLDWELL BANKER PRIME REALTY DR — Voice desk / Cap Cana

BUYER CALL

Lucía M. — Inbound · Call ended 02:18

Buyer
"Two bedrooms in Cap Cana, up to US$650,000. Is there anything I can view on Friday?"

Brokerage AI
"Unit 4B is listed at US$625,000. The listings desk confirmed availability this morning. Shall I ask an agent for a Friday viewing?"

Buyer
"Yes, after lunch. Please send the floor plan on WhatsApp."

Outcome / Viewing requested

LISTING USED ON THE CALL



Punta Vista / Unit 4B
2 bedrooms · US$625,000
Verified 09:10 AST · Listings desk

AGENT INBOX

Confirm Friday viewing
Assigned to Sofía R. · Due today

Open viewing request

A viewing request reaches a named agent. The agent confirms the slot with the buyer.

AIM 1
30 Mar – 26 Apr

Connect the brokerage number

Pilot a live number with verified listing facts. When stock or price needs checking, the caller can reach a person.

AIM 2
27 Apr – 24 May

Capture a usable buyer brief

Record budget, location, timing and the unit discussed in Zoho. Before outbound calls, agree the audience, permissions, calling windows and suppression list.

AIM 3
25 May – 21 Jun

Turn the call into a confirmed viewing

Assign the request and approved media to an agent. Follow the buyer's channel preference. Track requested and confirmed viewings separately, then attribute closed sales.

ElevenLabs channels — Outbound campaigns — WhatsApp call permission

CHAPTER 06 / FUTURE HORIZONS & AI ENABLEMENT / 30 MAR – 21 JUN 2027

Horizon 2 / Voice operating costs

Horizon 2 planning scenario for one calendar month, priced separately from the foundation. At standard rates and within the Business plan concurrency limit, 20,000 connected voice minutes cost US$1,600 for the ElevenLabs platform.

20,000 min	1 month	US$1,600
Connected conversation time	Business plan	Platform subtotal

Business subscription	12,375 included minutes	**US$990**
Additional standard minutes	7,625 × US$0.08	**US$610**
Monthly platform subtotal	20,000 minutes · US$0.08 effective rate	**US$1,600**

WHAT DETERMINES THE OPERATING TOTAL

Add language-model usage, telephone numbers and carrier charges by destination, plus applicable WhatsApp or text charges. The calculation assumes standard minutes within 40 concurrent calls. Burst usage, if enabled, has a different rate. Test the chosen model, country mix and call duration before committing volume.

HOW TO DECIDE WHETHER TO SCALE

At four connected minutes per conversation, 20,000 minutes represents 5,000 conversations. Actual outcomes depend on contact rates and buyer intent. Divide total campaign spend by confirmed viewings, then link paid closings back to those same buyers.

This voice scenario sits outside the US$19,200 foundation budget. Any participation for Fidel in net commission received on business originated by Factory Internet requires a separate agreement covering attribution, shared credit and refunds.

ElevenLabs · monthly plans and minutes

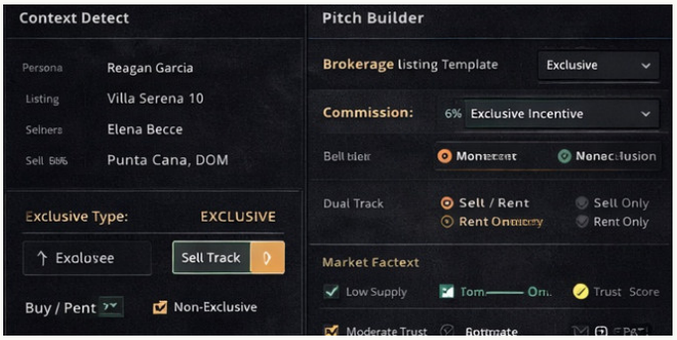
ElevenLabs · additional call costs

CHAPTER 06 / FUTURE HORIZONS & AI ENABLEMENT / 22 JUN – 13 SEP 2027

Horizon 3 / Seller acquisition

A valuation request becomes a signed instruction and a verified listing. Your listing agent can see which owner decision is needed and which details still require approval.

WORKSPACE DESIGN REFERENCE



A26 · Seller Pitch Composer

PRIME REALTY / HORIZON EXPERIENCE



AIM 01 / 22 JUN – 19 JUL

Seller enquiry & valuation

Record the owner, property and source. The listing agent agrees the valuation appointment and attaches approved comparable evidence.

AIM 02 / 20 JUL – 16 AUG

Pitch & signed instruction

Compose an exclusive or non-exclusive proposal. Track terms through owner review and record the signed instruction against the listing.

AIM 03 / 17 AUG – 13 SEP

Verified publication

Prepare the description, price and media from owner-approved facts. The listing lead authorises publication and tracks buyer interest.

EVIDENCE FOR THE NEXT INVESTMENT

Compare valuation requests, signed instructions and published listings from the same seller cohort.

See the affiliate horizon ›

CHAPTER 06 / FUTURE HORIZONS & AI ENABLEMENT / 14 SEP – 6 DEC 2027

Horizon 4 / Affiliate operations

An interested affiliate could adopt the proven Cap Cana workflows while retaining its own data boundaries. Office leaders would see comparable funnel and receipt measures.

WORKSPACE DESIGN REFERENCE



PGA11 · Daily Summary / PGA14 · Capital Flow

PRIME REALTY / HORIZON EXPERIENCE



AIM 01 / 14 SEP – 11 OCT

Office onboarding & controls

Agree local stage definitions and configure permissions, ownership and finance visibility. Restore a sample export before first use.

AIM 02 / 12 OCT – 8 NOV

Comparable performance & receipts

Show viewing conversion, aged opportunities and outstanding commission by participating office. Use traceable invoices and receipts.

AIM 03 / 9 NOV – 6 DEC

Supervision & rollout

Review exceptions and action owners each week. Use adoption, service quality and cost per confirmed outcome to choose the next workflow or office.

EVIDENCE FOR THE NEXT INVESTMENT

A participating office can trace each permitted total to its own records and can resolve an exception with a named owner.

Optional platform assessment · OpenAI Frontier

CHAPTER 07 / ENGAGEMENT CONFIRMATION

Confirm the implementation

Please review the Cap Cana foundation scope, budget and start date below. To approve the programme, return a signed copy of this page to Fidel by WhatsApp.

FIRST DESIGN SESSION / CAP CANA OFFICE

Tuesday, 1 December 2026

2:00–3:00 pm AST · Michael Heuser and Fidel Ion

DESIGN

Four weeks of co-design and team formation

At the 22 December session you review the designs, team selection and January priorities. Fidel's first US$3,000 retainer is due on 29 December, after the four design weeks.

IMPLEMENTATION

Twelve active build weeks

The engineers build under Fidel's direction. Your office pays them weekly through Upwork. Review each completed week on Tuesday afternoon, with a strategy discussion at each four-week close.

INVESTMENT

Up to US$19,200 for services and technology

US$12,000 for Fidel's four retainers, up to US$4,800 for engineering including Upwork client fees, and US$2,400 for technology. Fidel bills every four active weeks in arrears. No services payment is due at kickoff.

CONFIRMATION

I confirm the Cap Cana foundation scope, budget and proposed 1 December start. Michael and Fidel will agree the weekly outputs during design. Each later horizon requires separate approval.

Michael Heuser / authorised representative

Date