

WORKSHOP

Becoming the Go-to Lender

with Homebot

Learn how to...

- ✓ **LEVERAGE** YOUR RESOURCES
- ✓ **BUILD** YOUR STRATEGY
- ✓ **DELIVER** PRO-LEVEL PRESENTATION
- ✓ **ADD VALUE** AFTER THE MEETING

DISCLAIMER: Agent Co-Sponsorship is only available to PRO Homebot users. For questions or support related to your account, contact customersuccess@homebot.ai.



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Why Co-Sponsor Agents



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Build Wealth

Why Co-Sponsor Agents

Benefits to Lender

1. Become the go-to Lender in your community
2. Help your Real Estate Agents grow their business
3. Organically expand your reach
4. Complete the trusted triad

Benefits to Agents

1. Create a listings machine with your past client database
2. Streamline the prospecting process with your leads
3. Supercharge your brand with Homebot's Video capabilities



STEP 1 Leverage your resources

Coach yourself up on the Homebot system

- Facebook Mastermind Group for Lenders
- Help Center articles and videos
- 1-1 Homebot Trainings
- Homebot Account Manager



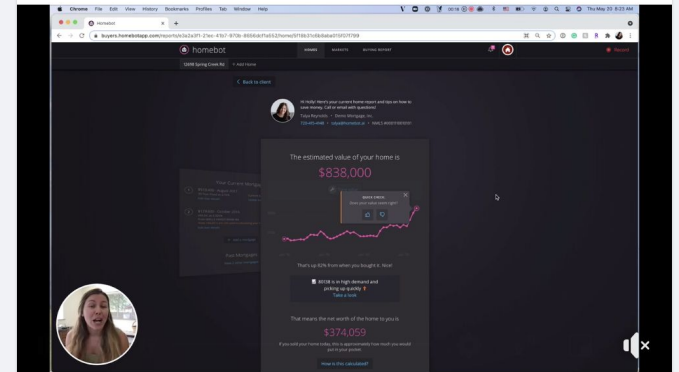
Homebot Mastermind Community for Lenders



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May 20 at 9:29 AM · 🌐

Check out our latest feature enhancement for clients in high-demand markets! Be sure to add a personalized video explaining why the valuation could be off and facilitate better conversations with your clients!



View Insights

192 Post Reach >

👍 5

2 Comments



Like



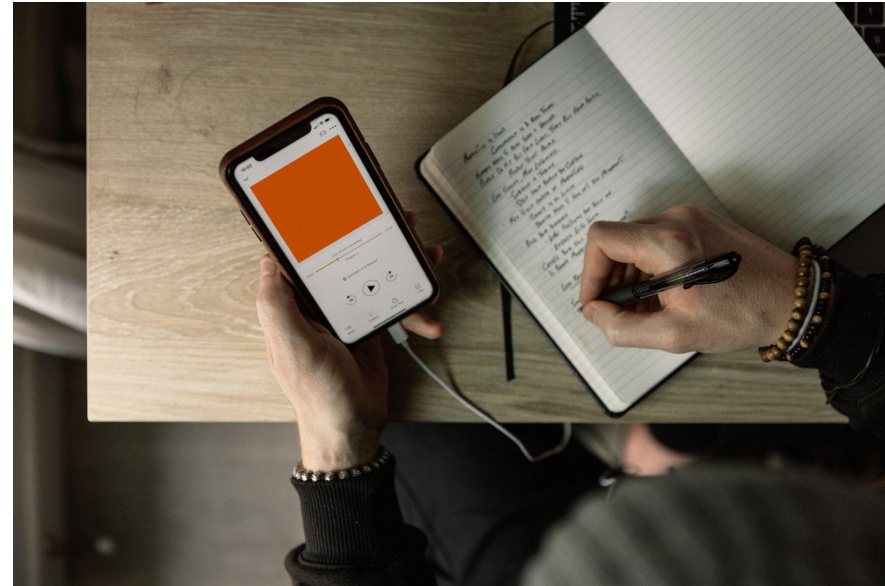
Comment

All Comments ▾

STEP 2 Build your strategy

Consider how you'll fill seats for your events and gain interest:

1. Where do you connect with Real Estate Agents
2. Gain interest by demonstrating value
3. Consider presentation location
4. Leverage Homebot to stay connected & stand out to Real Estate Agents




Where You Connect with Real Estate Agents

- Phone Calls
- Email Campaigns
- Social Media
- Events
- Desk Rentals
- Open Houses



Gain Interest by Demonstrating Value

1. Send a Sample Digest
2. Shoot a Custom Video
3. Send Screenshot of your Activity Feed
4. Email a Testimonial Video
5. Handoff a Homebot CMA Request



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Build wealth with your home

Send us a personalized request for the homebot that helps you achieve your financial goals

What's your home worth?

Get Homeowner leads

All signups will become clients and begin receiving monthly home digests

<https://hmbt.co/mYX9GQ> copy



Homebot Testimonial - Spire Financial + Compass Real...

21 views • 2 months ago



Consider Presentation Location

1. Virtually

Zoom

Google Meet

Microsoft Teams

2. In-person

Lunch and Learns

Appreciation Events



Leverage Homebot to stand out

Stand out to Agents in your area by customizing your Co-Sponsorship profile

1. Customize Brand Details to include the following:
 - Your total years in the mortgage industry
 - A personal bio about what sets you apart from other Lenders
 - A personalized introduction video that will show across your partners co-branded digests
2. Add 'Pitch an Agent' video



Click [HERE](#) to learn how to customize Brand Details and add the 'Pitch an Agent' video



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Introduction

12 CLOSED LOANS IN 80202 | 40 CLIENTS HELPED IN LAST 60 DAYS

"I enjoy working with people and always knew it was what I was meant to do! Originally from Ohio and have been living in Colorado since 2012. I look forward to connecting you to your dream home!"

Any questions for Mike?

What are my cashout options? | Mike Smith | 303-555-5555 | NMLS #9999999 | 12 YEARS IN INDUSTRY

What would my refi rate be?

Ask a question...

Back to Refi options

STEP 3 Deliver PRO level presentation

Make your pitch irresistible

- Show value
- Highlight how you'll work together
- Offer Freemium sign up at the event



STEP 4 Add value after the meeting

Continue the discussion after the meeting

- Help get their clients loaded in Homebot
- Provide Homebot Resources
- Suggest/set up 1-1 coaching with a Homebot Representative



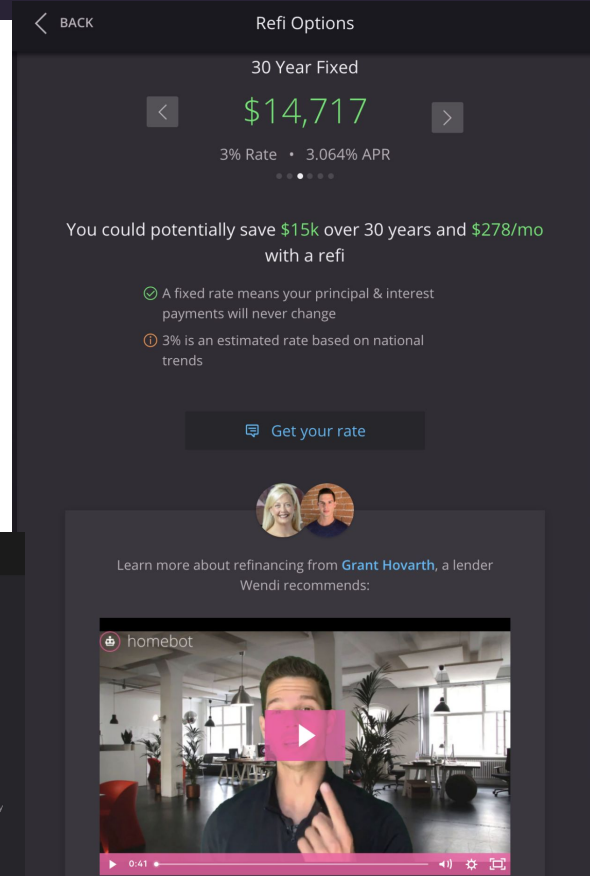
BONUS Co-Sponsored videos

Add value to the Agent's digests using Video Manager*

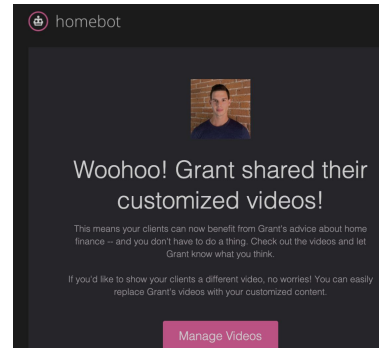
Applies to prequalification and 30 year fixed refi videos:

- Agent's clients will hear direct from you
- Agent will be notified when you add video
- Agents can choose to add their own videos

*This feature can be disabled



The screenshot shows a mobile application interface. At the top, there is a navigation bar with a back arrow and the text "Refi Options". Below this, the text "30 Year Fixed" is displayed. A large green number "\$14,717" is shown, flanked by left and right navigation arrows. Below the number, it says "3% Rate • 3.064% APR". A progress indicator shows five dots, with the first one filled. Below this, a message states: "You could potentially save \$15k over 30 years and \$278/mo with a refi". Two bullet points provide details: "A fixed rate means your principal & interest payments will never change" and "3% is an estimated rate based on national trends". A button labeled "Get your rate" is visible. Below the button, there are two circular profile pictures of a woman and a man. Text below the photos reads: "Learn more about refinancing from Grant Hovarth, a lender Wendi recommends:". At the bottom, a video player is shown with a play button overlay. The video player has a progress bar at the bottom showing "0:41" and standard video controls.



The screenshot shows a mobile application interface. At the top, there is a navigation bar with a home icon and the text "homebot". Below this, there is a notification card. The card features a small profile picture of a man and the text: "Woohoo! Grant shared their customized videos!". Below the text, it says: "This means your clients can now benefit from Grant's advice about home finance – and you don't have to do a thing. Check out the videos and let Grant know what you think." At the bottom of the card, there is a button labeled "Manage Videos".

Can't find what you're looking for? [Let us know here.](#)



Agent Pitch Deck

Make a copy of our agent pitch deck and setup a presentations with agents in your network!



Agent Invite Templates

Jump start your agent invite process by using our agent email invite templates. Copy what you like and make it your own.



Strategies for Inviting Agents

Learn how to leverage your personal agent invite landing page and make the most of Freemium.

Bookmark our [Agent Pitch Kit](#) for easy access to resources, shareable content, and best practices!

Bootcamp for Agents

Learn how to successfully pitch agents to your Homebot.

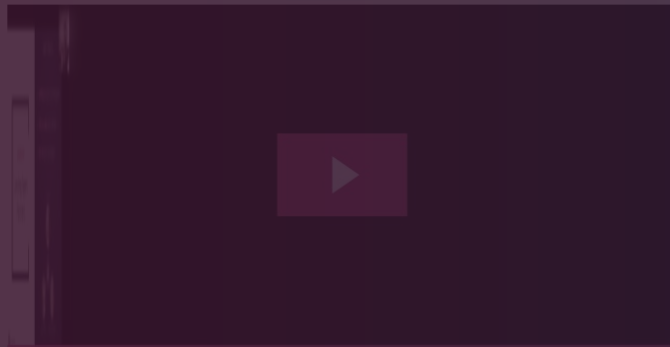
Homebot for Agents One-Pager

Use this one-pager to pitch your personal agent invite landing page.

Homebot for Agents Video Explainer

Use this video explainer to pitch your personal agent invite landing page to an agent partner for a quick explainer.

Learn how to successfully pitch agents



Join Homebot Pros, Grant & Erin to **learn the top 4 steps** to landing agent partners and expanding your business.

In this workshop, we cover:

1. How to create & nurture agent relationships
2. Using value adds to land the meeting
3. Successfully pitching agents on joining Homebot
4. Once landed, how to ensure your agents are successful

Register for a live event or download this presentation!



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Q&A with Scott Schang

For support with your account - customersuccess@homebot.ai

To upgrade, sign-up, or see a demo - sales@homebot.ai

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