

WORKSHOP

Creating Clients for Life

with Homebot for Buyers



homebot

Learn how to...

- ✓ **CREATE CLIENTS FOR LIFE** BEFORE THE TRANSACTION
- ✓ **LEVERAGE BUYER DATA** TO DRIVE TRANSACTIONS
- ✓ **GENERATE & NURTURE** NEW BUYER LEADS

DISCLAIMER: Specific features including Agent Sponsorship and Power Ups may vary due to your company's compliance standards. For more information on what is specifically available for your account, please contact customersuccess@homebot.ai and they will assist you accordingly.

Meet Holly Homeowner

Holly just bought a new home for \$385,000. Follow her journey as she uses Homebot to build wealth over time.



\$ 102,000

HOME EQUITY

HOME DIGEST

Holly receives Homebot from her loan officer or real estate agent



Personalized home financial data



Track home value and equity



Hi Holly, Here's your current home digest and tips on how to save money!

The estimated value of your home is

\$410,000

450k

400k

350k



homebot

The background features two thin, light-colored wavy lines that sweep across the frame. Each line has several small circular dots placed at intervals along its path.

60% of buyers in the U.S. are repeat buyers

Start scheduling next year's business today.



Homebot for Buyers

Homebot for Buyers gives your clients detailed market insights at the click of a button.

Allowing your clients to:

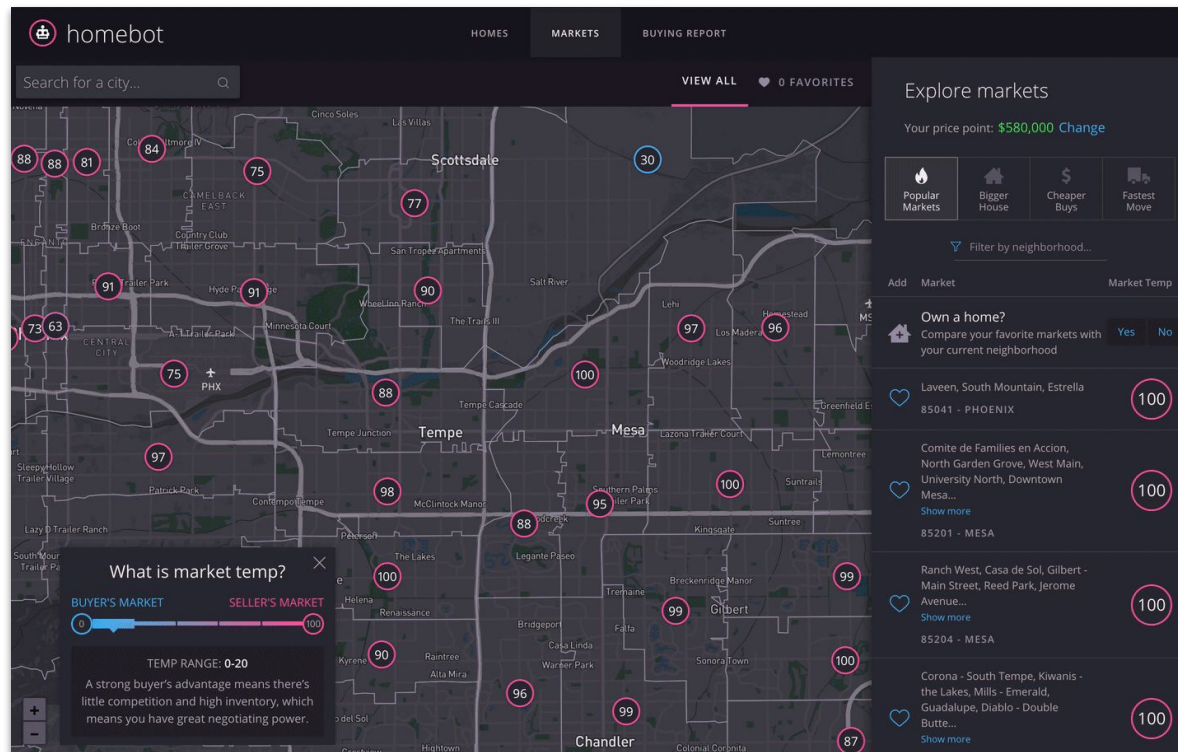
- Search markets based on their purchasing goals
- Compare areas of interest
- Learn about the market firsthand
- Ask educated questions

The screenshot displays the Homebot app interface. At the top, there's a navigation bar with 'homebot' logo, 'HOMES', 'MARKETS', and 'BUYING REPORT'. Below this is a search bar 'Search for a city...' and a 'VIEW ALL' button. The main area shows a map of Denver with various neighborhoods highlighted by colored circles and numbers. A modal window is open in the center, displaying 'homebot' logo, 'WELCOME, JULIE!', and 'Ready to buy smart?'. Below this, it says 'Great! We believe you can build wealth without sacrificing the right home. A few more details can help customize your buying journey:'. There's a section 'Where are you house hunting?' with a search bar. To the right, there's a sidebar titled 'Explore markets' showing 'Your price point: \$650,000 Change'. Below this are four buttons: 'Popular Markets', 'Bigger House', 'Cheaper Buys', and 'Fastest Move'. Further down is a table with columns 'Market' and 'Market Temp'. The table lists several neighborhoods with their market scores in circles: Northeast Lakewood, Two Creeks, North Alameda, Barths, Edgewater... (97); North Park Hill, South Park Hill, Northeast Park Hill, East 29th Avenue, East Colfax... (96); Deer Creek, Homestead, Hilldale Pines, Pleasant Park Corridor, Indian Hills... (96); Del Mar Parkway, Northwest Aurora, Highland Park, Highline Villages, Expo Park... (95).

Leveraging Market Explorer

Your prospects become primed for buying as they dive deeper into markets of interest:

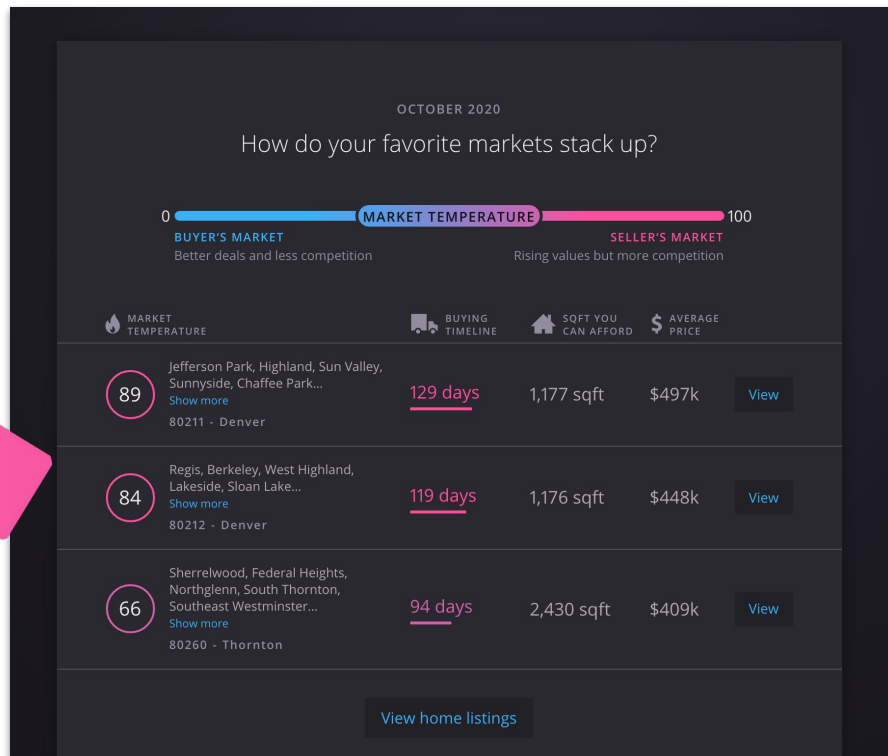
- Getting detailed property and market insight
- Favoriting markets to add them to their buyers report
- Viewing homes — directly from Homebot



Market Insight Delivered

With the **Homebot buyers report**, your clients can track & compare markets of interest throughout their buying journey.

Keeping you top of mind the entire time.



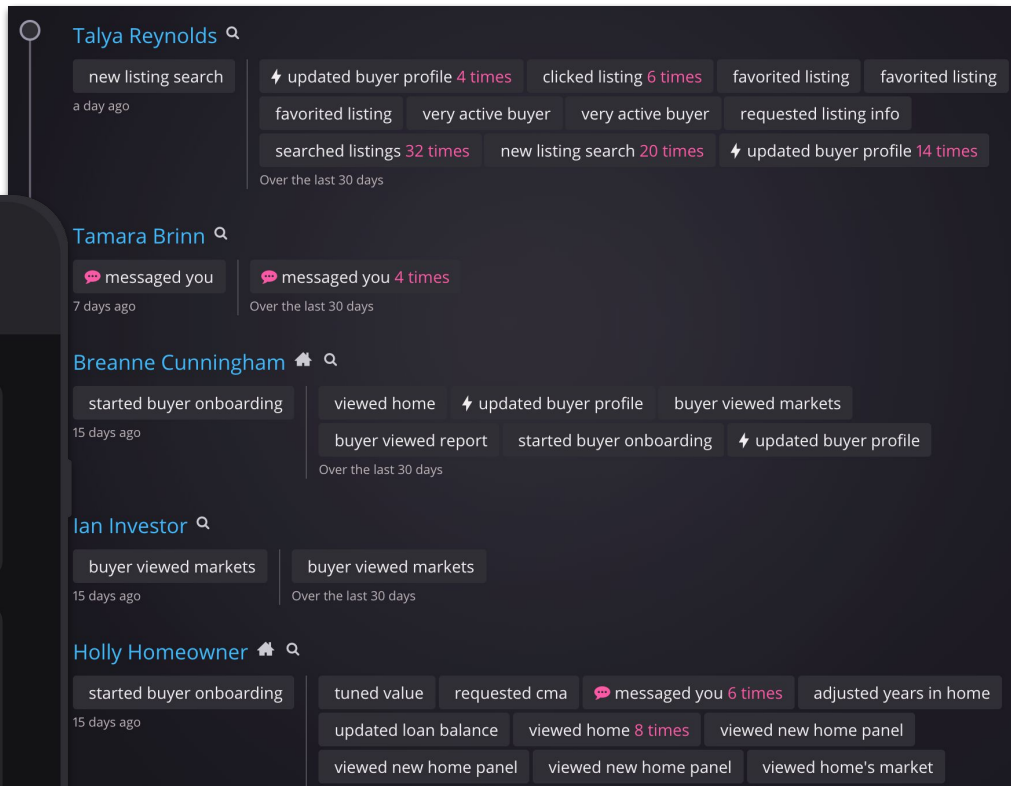
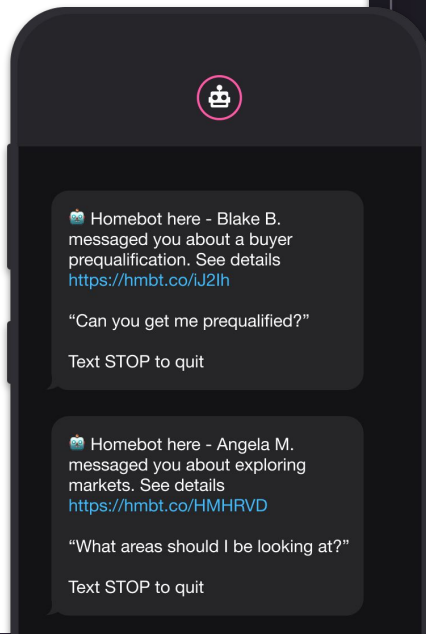
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Always be the first to know

Whether your buyer is ready for pre-qualification or your homeowner is considering downsizing, you'll be the first to know.



homebot



Your Buyers = Your Buyer Data

As your clients engage with Homebot for Buyers it captures, stores, and continually updates important buyer data:

- Providing you direct insight into their buyers journey
- Allowing you to leverage behavioral data to drive transactions
- Ensuring your prospect stays in your sphere of influence



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Tamara Brinn

Buyer profile

Price point: 650K

Buyer type: Buy different home

Move date: Aug 01, 2020

Priorities: Right timing, Minimal money down, Outdoor space

Sent 10/10

Next report: 11/12 - 11/22

Favorite markets: 80211, 80212, 80260

Pre-Quals

Add Pre-Qual

You haven't added any Pre-Quals yet

Activity Feed

Tamara messaged you about buyer prequalification: "Can you get me prequalified?"

4 hours ago

Tamara was sent the buyers report email

12 days ago

Uploading your clients

Start nurturing prospective buyers by uploading all of your prospects to Homebot! All we need is their:

- ❑ First & last name
- ❑ Email address

Be sure to add:

- Prospective buyers you've talked to
- All pre-quals sitting in your database
- Clients thinking about investing in real estate
- Homeowners that may be looking to upsize or downsize



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And capture new homeowners!

The screenshot displays the Homebot 'Clients' management interface. At the top, a navigation bar includes 'ACTIVITY', 'HOMEOWNERS', 'BUYERS', 'LEADS', 'ISSUES', and 'ADD CLIENT' (highlighted with a pink 'NEW' tag). The main heading is 'Add Clients', with options to 'Add one client at a time' or 'Transfer clients in bulk' (also with a pink 'NEW' tag). Below this, a modal titled 'Explore markets' is open, showing a price point of '\$380,000' with a 'Change' link. It features four filter buttons: 'Popular Markets' (flame icon), 'Bigger House' (house icon), 'Cheaper Buys' (dollar sign icon), and 'Fastest Move' (truck icon). A 'Filter by neighborhood...' dropdown is also present. At the bottom of the modal, there's a section 'Own a home?' with a house icon, a description 'Compare your favorite markets with your current neighborhood', and 'Yes'/'No' buttons. To the right of the modal, another section titled 'ARE YOUR DATA' and 'ABOUT THESE CLIENTS' shows green checkmarks. Below that, an 'ADD FILE' section includes a 'Choose file' button, a dashed box for file upload, and an 'Upload' button. A note specifies: 'Upload your file in a spreadsheet format (.csv, .xls, .xlsx). No PDFs or images, please'.

PART 1

Creating Clients for Life

5 ways Homebot creates clients for life


1. Homebot turns eligible homeowners into repeat buyers
2. Homebot keeps your clients' data safe & you top of mind
3. Homebot differentiates you from competitors by providing valuable, easy-to-understand market insights your clients can't access elsewhere
4. Homebot Home Search POWER UP keeps clients in your sphere of influence as they browse properties
5. Homebot nurtures your clients throughout the buying journey with automatic market updates



1. Turning Homeowners into Buyers

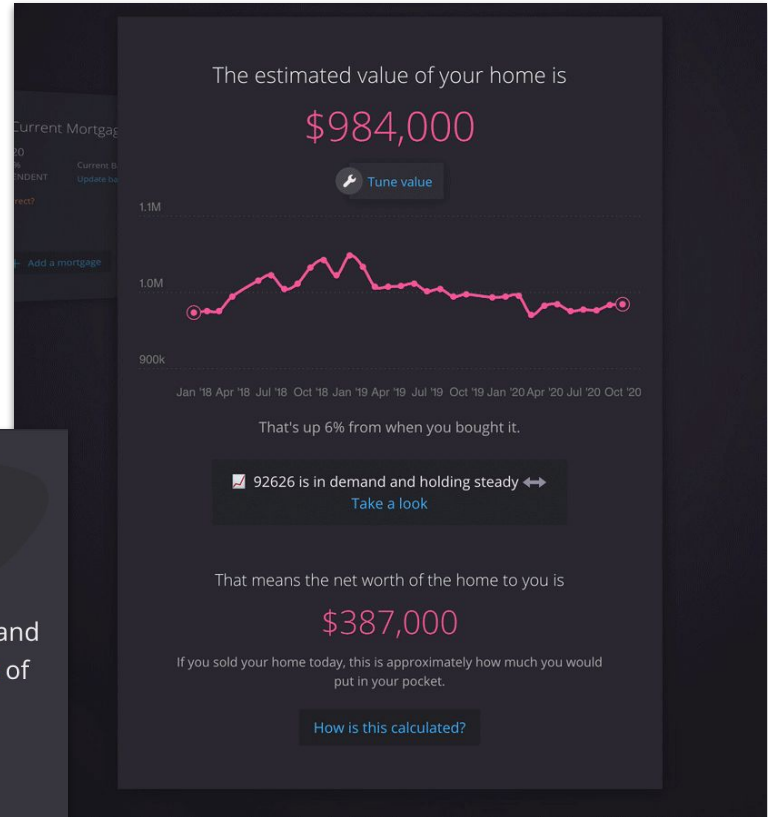
From Homebot's Home Value Report, homeowners can view the selling temperature of their home and compare it to other homes in their area:

- Identify your “down-size” & “move up” clients
- Follow your clients through the selling & buying journey
- Drive listings for yourself or a real estate agent partner



You could downsize and pocket around **\$131k** of cash

[Get more details](#)

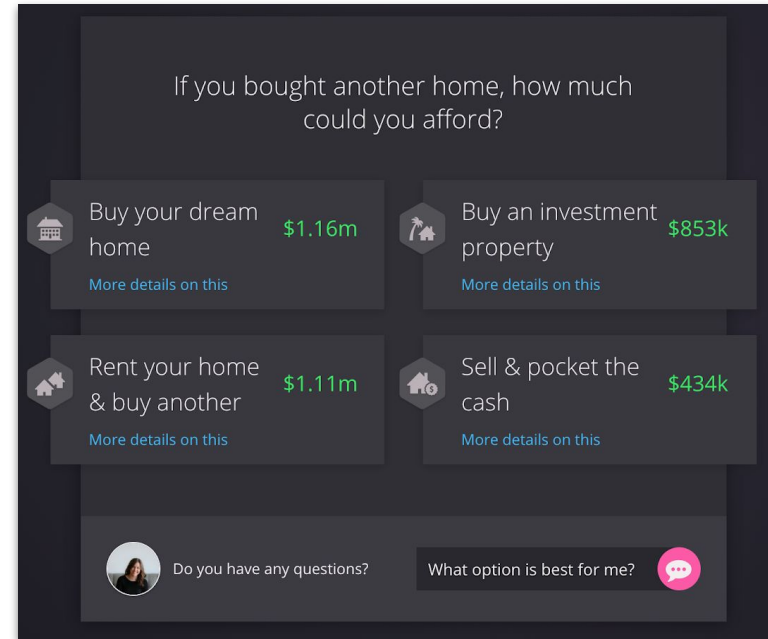


1. Turning Homeowners into Buyers

As your homeowner's equity grows to 35% or more, they can begin to explore their purchasing power.

Homebot sparks ideas about how to leverage their equity to grow their wealth. Ensuring:

- You're always the first to know when a client is thinking of buying
- Clients rely on you as their trusted expert
- Client data remains in your hands only



2. Keep your clients data

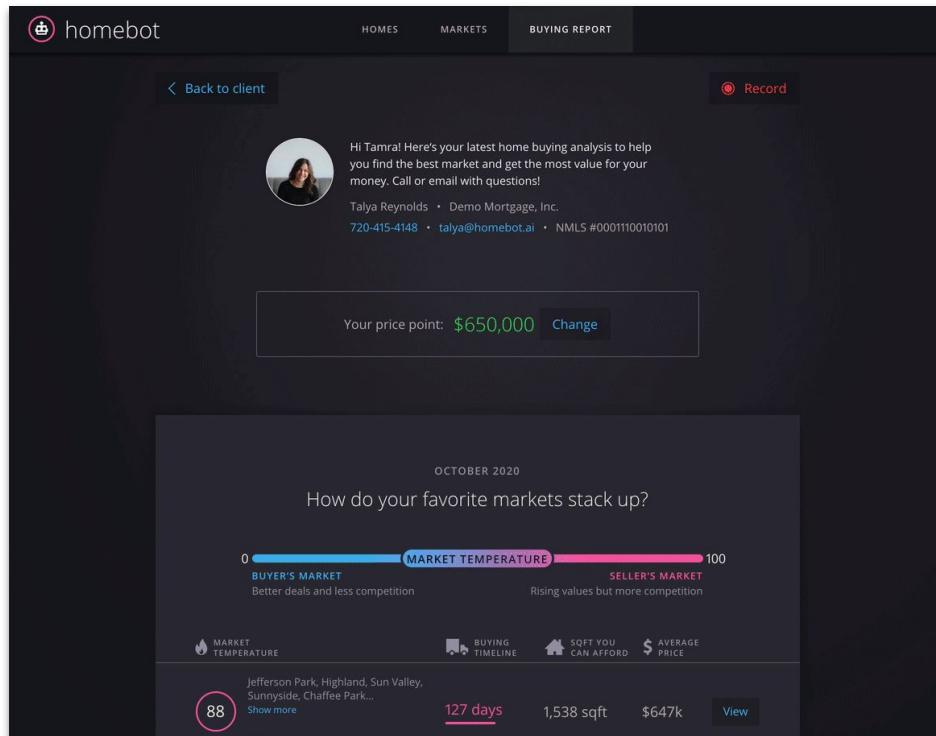
By uploading your prospects to Homebot:

- Your client's data remains protected in your hands rather than sold off to the highest bidder
- Build a database with rich behavioral insights

Tip: Activate Home Search by Ylopo or Custom Home Search to ensure your clients can view properties from their buyers report.



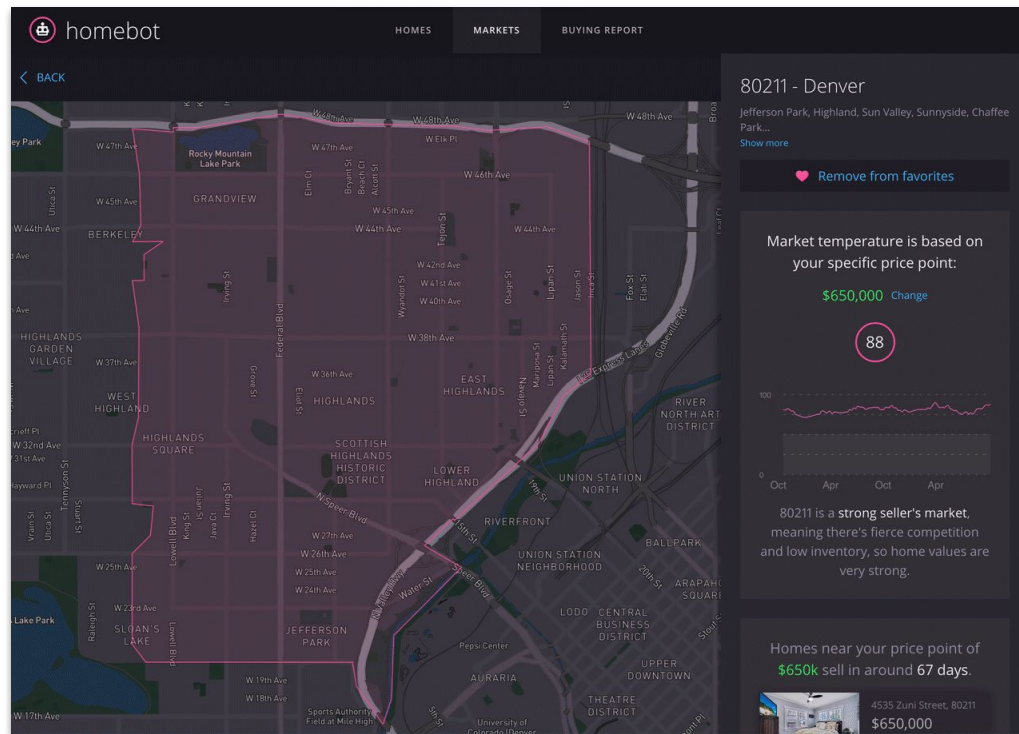
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3. Stand out from competitors

Homebot's in-depth buyers report & market explorer **empower your clients with information:**

- Market conditions + timeline to buy
- Side-by-side market comparisons
- Home search ability
- Pre-qualification at the click of a button

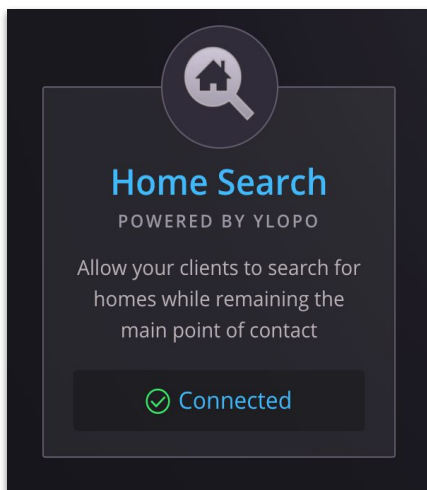


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4. Power Up with Home Search

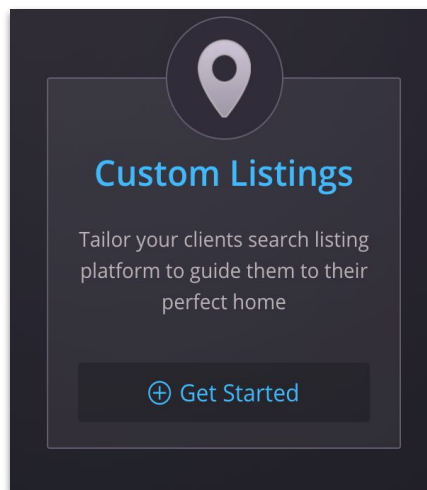
LENDERS

Home Search by Ylopo allows clients to view homes directly from Homebot while storing their data for your eyes only:



REALTORS

Custom Listings allows you to sync your custom IDX with Homebot, keeping buyers in your sphere of influence while they browse properties:



Home Search by Ylopo

Home Search by Ylopo enables your clients to easily navigate to a custom home search right from their market explorer:

- ➔ Click on the **Customize** tab, activate the *Home Search by Ylopo* POWER UP & let it do the rest.

The screenshot displays the 'Home Search' interface, powered by YLOPO, within the homebot application. The top navigation bar includes 'Clients', 'Agents', 'Share', 'Customize' (highlighted with a red 'NEW' badge), and 'Account'. The main header shows a back arrow, a magnifying glass icon, and the text 'Home Search POWERED BY YLOPO'. Below this, the 'homebot' logo is visible, along with tabs for 'HOMES', 'MARKETS', and 'BUYING REPORT'. The 'MARKETS' tab is active, showing a map of the Louisville area with a red outline indicating the search area. To the right of the map, a section titled '80027 has a seller's advantage' provides a line graph and text indicating that home values are growing steadily. Below this, a list of homes near the user's price point of \$550k is shown, including details like address, price, and features. A 'View more 80027 homes' button is at the bottom of this list. On the right side of the interface, there is a 'STATUS' section with a green checkmark indicating the search was added on Mar 20, 2020, and a 'Disconnect' button. Below this is a 'View in Market Explorer' button. The 'KEY FEATURES' section at the bottom lists three features: 'Guide your client through the entire buying process', 'Get notified when clients request a showing or more info', and 'See client search activity and Put your marketing on Auto'. The bottom right corner features a pink circular icon with a white speech bubble.

Custom Listings

For those with a preferred IDX, provide one-click access to your property listings website from the buyers report & Market Explorer:

- ➔ Click on your **Customize** tab to power up Custom Listings
- ➔ Open up your property site and search a zip code, copy the URL
- ➔ Add your url to Homebot
<https://www.realtor.com/realestateandhomes-search/{zipcode}>
- ➔ Substitute **{zipcode}** for the actual #



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The screenshot shows the Century 21 Denver website. The main heading is "Your preferred IDX". Below it, there's a search bar with "Denver" selected. The map shows various property listings with prices. On the right, there's a sidebar with "80203 - Denver" and a "Market temperature" section. A pink arrow points to the "View all 80203 listings" button at the bottom right.

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HOMES MARKETS BUYING REPORT

BACK

Your preferred IDX

CENTURY 21 FIND A HOME SELL A HOME MORTGAGE JOIN C21 MORE

Denver Price Beds Baths Filter Keyword MAP GRID

Search Entire Map

Denver Homes for Sale (318) Sort: Newest First

NEWLY LISTED

FOR SALE \$535,000
3 beds
2 baths
2,322 sq. ft.
4200 Lowell Blvd
Denver, CO 80202
Contact

NEWLY LISTED

FOR SALE \$395,000
or rent \$2,500/mo est.
3 beds
2 baths
1 half bath
2,569 sq. ft.
3847 E 13th Ct
Thornton, CO 80241
Contact

80203 - Denver
Capitol Hill, Speer, Five Points, Downtown Denver, Baker...
Show more
Add to favorites

Market temperature is based on your specific price point:
\$273,000 Change
69
New Jan Mar May Jul Sep
80203 has a seller's advantage, meaning there's decent competition and home values are growing steadily — probably a great investment.

There are 3 homes near your price point of \$273k and they're selling in around 41 days.

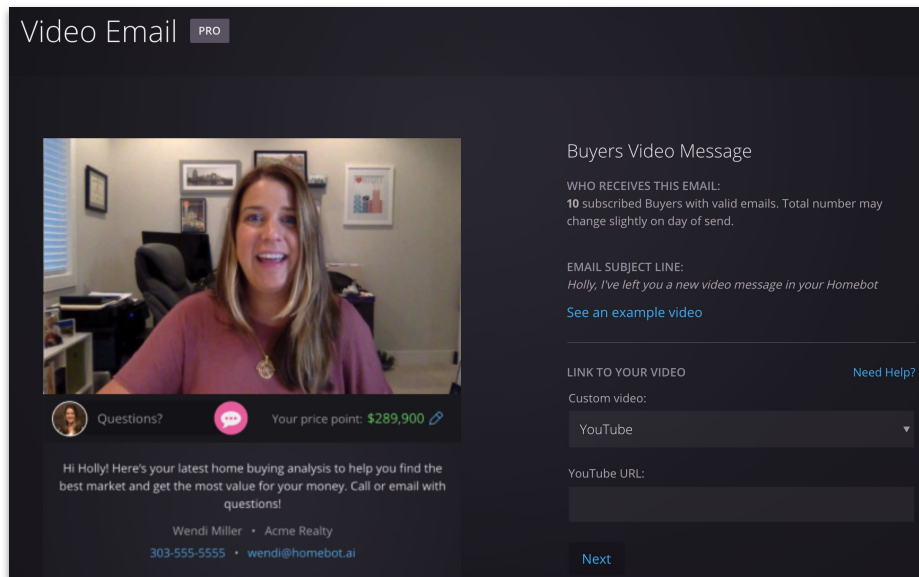
View all 80203 listings

5. Create engaged buyers

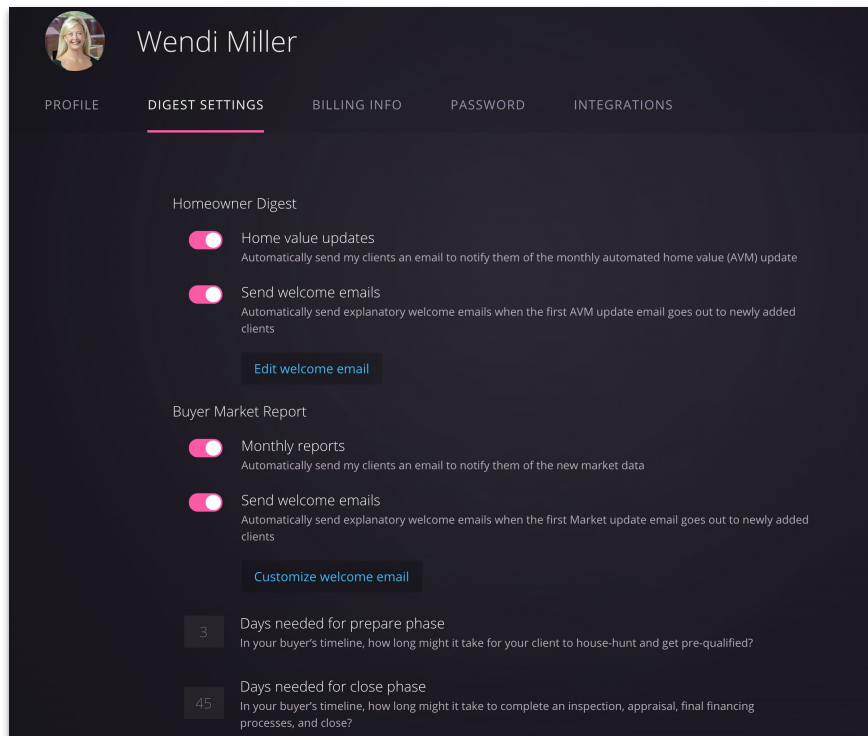
With access to Market Explorer, buyers finally have a way to understand the market they're buying in.

Use Homebot **Video Email** to empower your clients to make the most of Homebot for Buyers:

1. Introduce your clients to the buyers report
2. Call attention to relevant features to capture your buyers' interest
3. Follow up monthly and keep clients up-to-date on market trends
4. If you've recently activated a Home Search POWER UP, show them how to use it!



Set it & Forget it



It can take some buyers months — or even years — to finally make a purchase.

Homebot for Buyers:

- Automatically sends your clients their buyers report monthly
- Notifies you every time your client wants to talk to you
- Alerts you to any significant activity so you can follow up at just the right time



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PART 2

Leveraging Buyer Data

Search for a city...



VIEW ALL 0 FAVORITES

Thinking of selling your home?

Enter your address and Homebot will estimate what you can afford to buy next.

Add your current home address:

[Go](#)[< BACK](#)[SKIP FOR NOW >](#)

What is market temp?

BUYER'S MARKET

SELLER'S MARKET

0

100

TEMP RANGE: 0-20

A strong buyer's advantage means there's little competition and high inventory, which means you have great negotiating power.

Explore markets

Your price point: **\$289,900** [Change](#)



Popular Markets



Bigger House



Cheaper Buys



Fastest Move

[Filter by neighborhood...](#)[Add](#) [Market](#)[Market Temp](#)**Own a home?**

Compare your favorite markets with your current neighborhood

[Yes](#) [No](#)

Buffalo Run, Second Creek, Turnberry, Reunion, Aberdeen...

[Show more](#)

80022 - COMMERCE CITY

100



Twin Lakes, Chaffee Park, Sunnyside, Sherrelwood, Federal Heights...

[Show more](#)

80221 - DENVER

100



Quimby, Welby, South Thornton, North Washington, Northglenn...

[Show more](#)

80229 - DENVER

100



Montbello, Morris Heights, Gateway, Eastbridge, Northeast Aurora...

[Show more](#)

80239 - DENVER

100



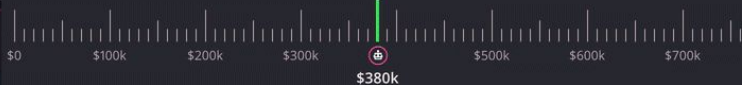
Search for a city...



What's your ideal price point?

Based on Homebot's quick analysis of Tempe's average home price, we've set your price point to:

\$380,000



Let's go!



Along the way, Wendi Miller is here to answer any questions you have!

970-708-0277 • nina+rea@homebot.ai

Explore markets

Your price point: **\$289,900** [Change](#)



Popular
Markets



Bigger
House



Cheaper
Buys



Fastest
Move

Filter by neighborhood...

Add Market

Market Temp

Own a home?

Compare your favorite markets with your current neighborhood

Yes No

Buffalo Run, Second Creek, Turnberry, Reunion, Aberdeen...
[Show more](#)

100

80022 - COMMERCE CITY

Twin Lakes, Chaffee Park, Sunnyside, Sherrelwood, Federal Heights...
[Show more](#)

100

80221 - DENVER

Quimby, Welby, South Thornton, North Washington, Northglenn...
[Show more](#)

100

80229 - DENVER

Montbello, Morris Heights, Gateway, Eastbridge, Northeast Aurora...
[Show more](#)

100

80239 - DENVER

What is market temp?

BUYER'S MARKET

SELLER'S MARKET



TEMP RANGE: 0-20

A strong buyer's advantage means there's little competition and high inventory, which means you have great negotiating power.



Q Search buyers... X

Prev 1 2 3 4 5 6 ... 9 Next

CLIENT (86) REPORT STATUS MOVE DATE NUMBER OF ZIPS PRICE POINT

Allen, jacqueline
jallen@rpm-mtg.com ✓ Sent 10/18 - 1 994K

Auger, Jaime
Jaime@timshermanlaw.com ✓ Sent 11/05 Mar 01, 2021 3 444K

Barley, John
jbarley2424@gmail.com ✓ Sent 10/22 - 1 114K

Bartolomea, Robert
robert@strategichomeloans.c Not sent Nov 01, 2020 1 850K

Bastian, Lori
lori@nickbastian.com ✓ Sent 11/08 - 1 1.38M

Bayle, Justin
justin@LendLA.com ✓ Sent 11/01 - 2 1.70M

Beisner, Derek
dbeisner@lend.us ✓ Sent 10/18 Sep 01, 2020 1 617K

Tamara Brinn ✎

Buyer profile

👁 Preview Report

✈ Send Report

\$ Price point: 650K

★ Buyer type: Buy different home

📅 Move date: Aug 01, 2020

★ Priorities: Right timing, Minimal money down, Outdoor space

✓ Sent 10/10

📅 Next report: 11/12 - 11/22

♥ Favorite markets: 80211, 80212, 80260

Pre-Quals

➕ Add Pre-Qual

\$ You haven't added any Pre-Quals yet

Activity Feed



Tamara messaged you about buyer prequalification: "Can you get me prequalified?"

4 hours ago



Tamara was sent the buyers report email

12 days ago



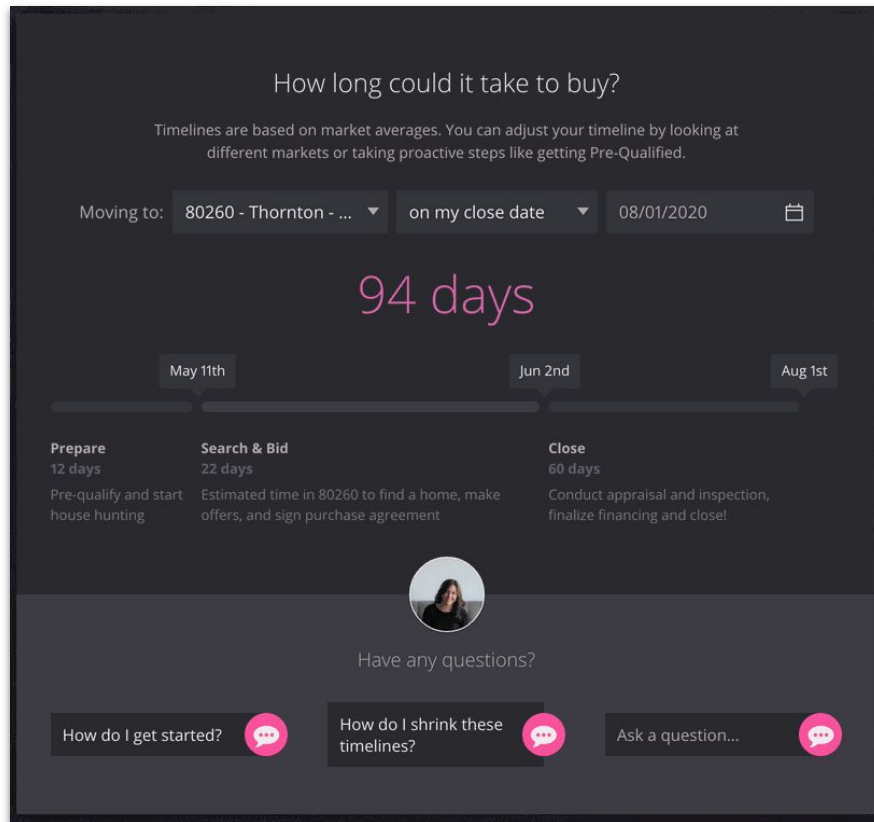
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From database, to “data-bank”

As clients engage with the buyers report, their activity is recorded and saved in their buying profile, giving you:

- Quick & easy access to behavioral data
- Insight into where your buyers are in the buying journey
- Detailed information about their buying preferences

Drive transactions by engaging at just the right time and turn your dataBASE into a “dataBANK”.



Leveraging the data

The Activity Feed helps you know who to contact and when!

- ❑ Filter by Active Buyers
- ❑ Hide clients that only have views

You can click on a client's name to view their personalized Activity Feed, letting you know what to talk about when you reach out.



homebot

Activity feed

All 🏠 Active Homeowners 🔍 Active Buyers ☐ Hide clients that only have views

○ Chana Homeowner 🏠

updated loan balance an hour ago added home Over the last 30 days messaged you updated loan balance viewed home 4 times viewed home's market

○ Talya Reynolds 🔍

searched listings 2 hours ago ⚡ updated buyer profile ⚡ updated buyer profile ⚡ updated buyer profile clicked listing 5 times very active buyer Over the last 30 days searched listings 23 times new listing search 16 times ⚡ updated buyer profile 12 times

○ Tamara Brinn 🔍

messaged you 2 hours ago messaged you 4 times Over the last 30 days

○ Dev Reynolds 🏠 🔍

viewed home 5 days ago viewed home viewed home Over the last 30 days

○ Breanne Cunningham 🏠 🔍

started buyer onboarding 8 days ago viewed home ⚡ updated buyer profile buyer viewed markets buyer viewed report started buyer onboarding Over the last 30 days ⚡ updated buyer profile

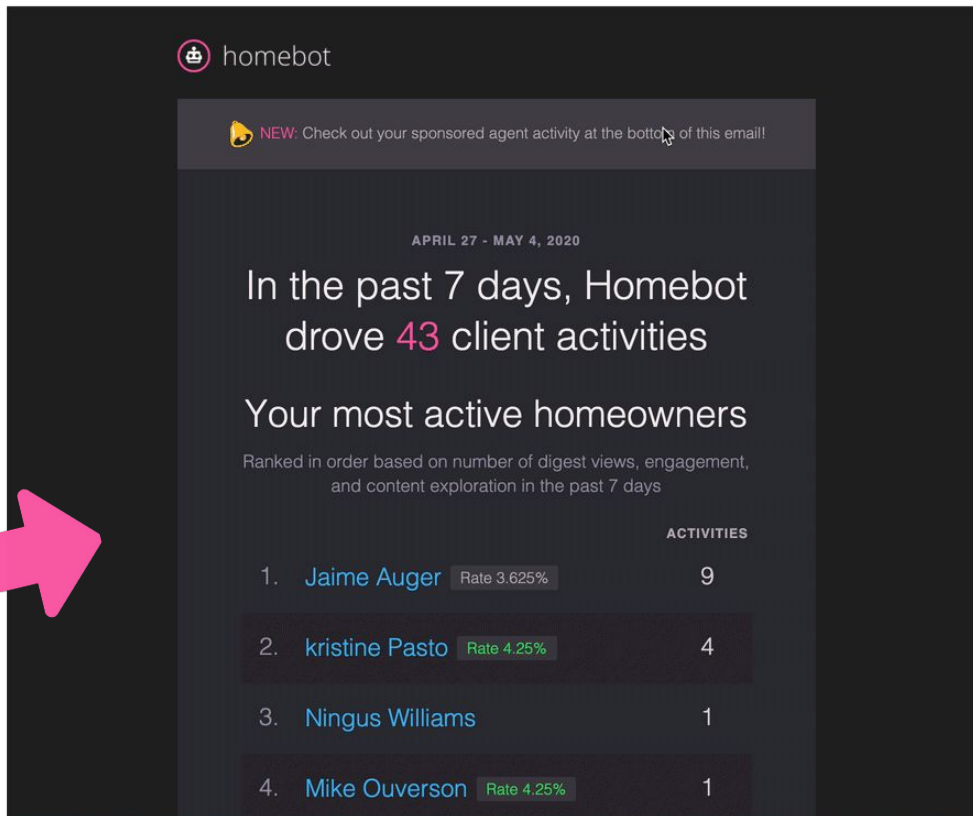
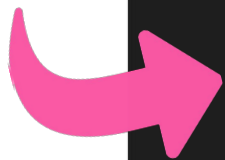
○ Ian Investor 🔍

buyer viewed markets 8 days ago buyer viewed markets Over the last 30 days

Weekly lead lists

Every week, Homebot emails
you a list of your

**Top 10 most engaged
homeowners & buyers**



The screenshot shows an email from Homebot. At the top, it says 'homebot' with a logo. Below that is a notification bar: 'NEW: Check out your sponsored agent activity at the bottom of this email!'. The main content is dated 'APRIL 27 - MAY 4, 2020'. The headline reads: 'In the past 7 days, Homebot drove 43 client activities'. Below this is the section 'Your most active homeowners' with a subtext: 'Ranked in order based on number of digest views, engagement, and content exploration in the past 7 days'. A table follows with the header 'ACTIVITIES'.

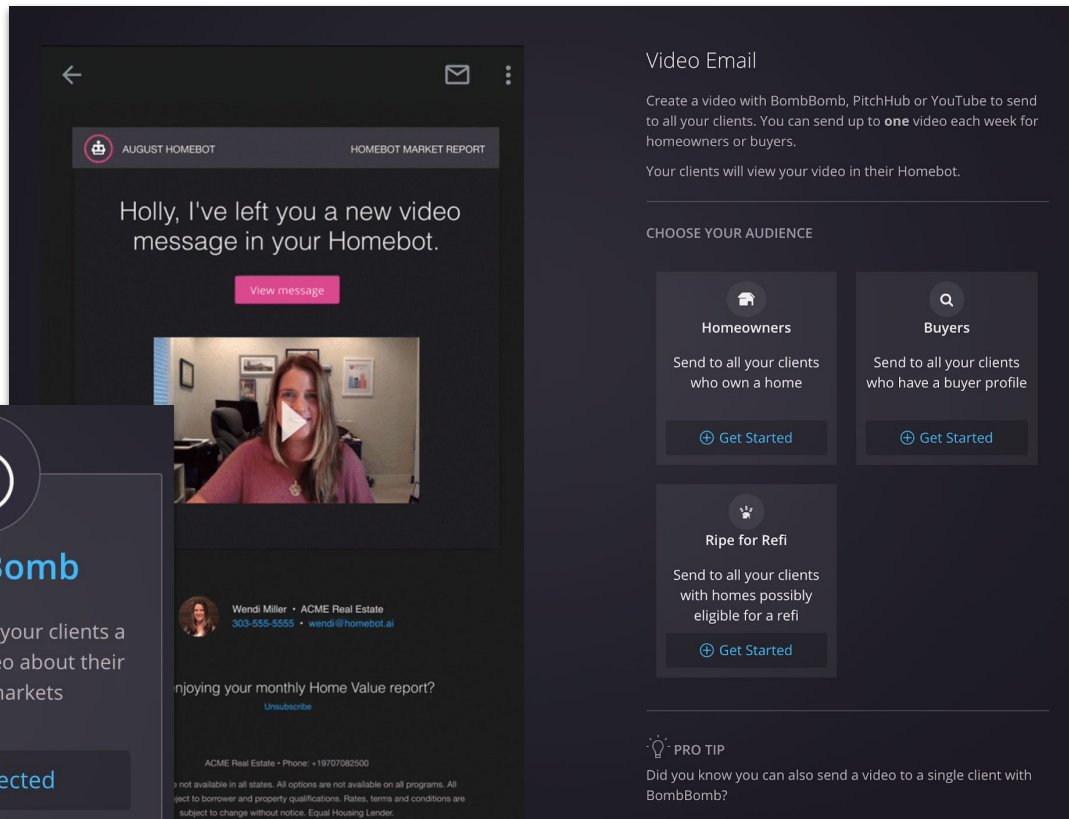
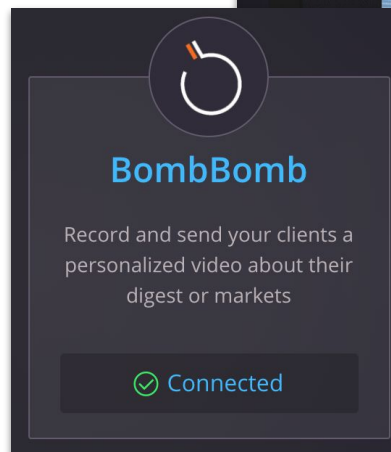
	ACTIVITIES
1. Jaime Auger Rate 3.625%	9
2. kristine Pasto Rate 4.25%	4
3. Ningus Williams	1
4. Mike Ouverson Rate 4.25%	1

Personalize the engagement

- Send clients with high engagement a personalized video driving them towards the next step in your funnel
- Alert all your buyers to changes in rates or the market via Video Email
- Use the buyer's report to encourage pre-qualifications and explain the market temperature



homebot



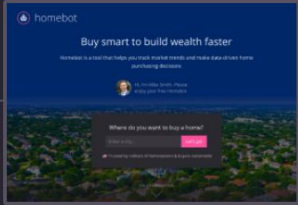
PART 3

Generating Buyer Leads

Capture New Leads

Available in your Share tab is a buyer lead capture page. Use it to add new prospects into Homebot to be nurtured for life.

- ➔ Homebot's lead capture pages are great for open houses, social media, and more!
- ➔ Use it as a call-to-action in a lead-generating campaign.

A screenshot of the Homebot lead capture page. The page has a dark blue header with the Homebot logo and the text "Buy smart to build wealth faster". Below the header is a form with a question "Where do you want to buy a home?" and a "Sign Up" button. The background of the page is a dark, textured image.

Get Buyer leads

All signups who complete onboarding will begin receiving monthly buyer reports

<https://hmbt.co/bzHT7F> [copy](#)



Lead Capture Best Practice



Incorporate Homebot into your (or your partners') top-of-funnel marketing

- ➔ Open houses, Real Estate classes: Rent vs. Buy, Saving for purchase, RE-investment
- ➔ Recycle content and coaching on social media
- ➔ Use Homebot as a call for action and a nurture-resource for those leads

Lead Capture Best Practice

Too much technology? Not another email...

- Integrate your customer experience
- Put all resources (with descriptions; short videos are best) on your website
- Activate or tie existing listings-search to Homebot for Buyers
- If you are savvy, take advantage of Zapier, or manage your lists.
- Ask for help!

Zillow
Here's a monthly local update based on homes you viewed in 80212

\$578,873
TYPICAL HOME VALUE

\$554,466
TYPICAL VALUE ONE YEAR AGO

+ 6.8%
1-YEAR FORECASTED VALUE INCREASE

63
HOMES FOR SALE

25
HOMES RECENTLY SOLD

Updated Home Search [Link](#)

to me
Hi Jay,

One or more new/updated listing(s) match your search

Back On Market
4901 Decatur Street, Denver, Colorado 80221
\$449,990 - Status: Active
3 Beds - 2 Baths - 963 Finished Sq Ft
4 Parking Spaces - .14 Acres
Single Family Residence (House) for Sale
[View Details](#) Listing ID: 9045720

New Listing
4695 Osceola Street, Denver, Colorado 80212
\$450,000 - Status: Active
2 Beds - 1 Bath - 2,002 Finished Sq Ft
2 Parking Spaces - .14 Acres
Single Family Residence (House) for Sale
[View Details](#) Listing ID: 2727120

New Listing
3655 Ames Street, Wheat Ridge, Colorado 80212
\$469,973 - Status: Active
3 Beds - 2 Baths - 1,512 Finished Sq Ft
1 Parking Spaces - .18 Acres
Single Family Residence (House) for Sale
[View Details](#) Listing ID: 9375478

[Click to View All Listings](#)

MARKET REPORT
DENVER REAL ESTATE - OCTOBER 2020

SINGLE FAMILY

\$599,418 AVERAGE SALES PRICE
+ 13% change 1 yr

6 MEDIAN DAYS ON MARKET
- 62% change 1 yr

CONDO

\$384,397 AVERAGE SALES PRICE
+ 25% change 1 yr

9 MEDIAN DAYS ON MARKET
- 50% change 1 yr

DENVER METRO
LIVEURBANDENVER.COM/MARKETREPORT



homebot

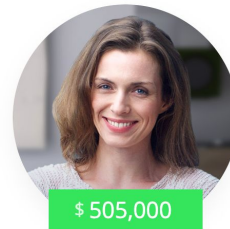
Create & Strengthen Partnerships

Whether you're a Loan Officer or Real Estate Agent, Homebot for Buyers works best with partnerships:

- Clients can request pre-qualification, signaling that they're ready to get serious
- Buyer data is used to inform your clients' buying experience & ensure a smooth transaction



Mike, Loan Officer



HOME EQUITY



Together is better.

With Homebot, Loan Officers and Real Estate Agents can work together to help their clients maximize wealth.



Wendi, Real Estate Agent



homebot

Bonus: Take advantage of our referral program!



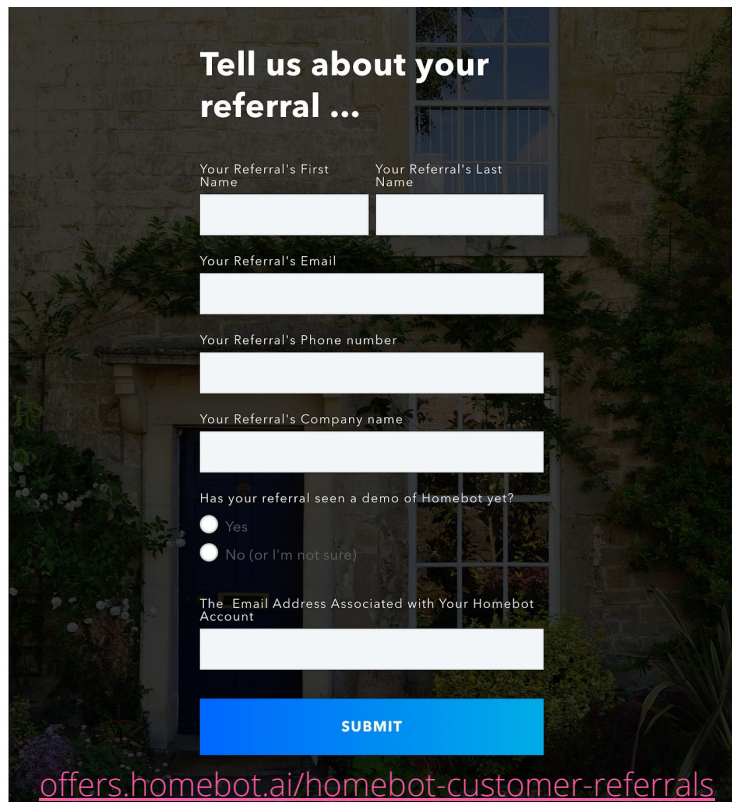
Homebot's Loan Officer Referral Program

Do you have a friend, family member, or peer who would love Homebot? Refer new loan officers to Homebot! They will get \$100 off their signup fee, and you will receive \$100 per referral.*

How it works:

- **STEP 1:** Fill out the form to let us know who your referral is. The first step to getting them on board is to show them how it works, so let us know if they need a demo.
- **STEP 2:** Once they're ready to signup, we'll provide them with a \$100 discount code.
- **STEP 3:** We'll keep you updated on when they become a customer! As soon as they qualify, we'll send you a \$100 Amazon gift card.

**In order to qualify new customers must stay on Homebot for 90 days and load a minimum of 25 clients to their database.*

A screenshot of a referral form overlaid on a background image of a house. The form is titled "Tell us about your referral ..." and contains several input fields and a submit button. The background image shows a two-story house with a stone wall and a window with a balcony.

Tell us about your referral ...

Your Referral's First Name

Your Referral's Last Name

Your Referral's Email

Your Referral's Phone number

Your Referral's Company name

Has your referral seen a demo of Homebot yet?

☐ Yes

☐ No (or I'm not sure)

The Email Address Associated with Your Homebot Account

SUBMIT

offers.homebot.ai/homebot-customer-referrals



homebot

Have additional questions?

For support with your account - CustomerSuccess@homebot.ai

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

DISCLAIMER: Specific features including Agent Sponsorship and Power Ups may vary due to your company's compliance standards. For more information on what is specifically available for your account, please contact customersuccess@homebot.ai and they will assist you accordingly.



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