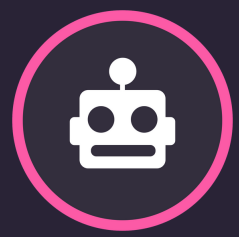


FROM LIST TO PURCHASE

HOW TO WORK WITH
YOUR HOMEBOT
PARTNER TO TURN
LISTINGS INTO
PURCHASES



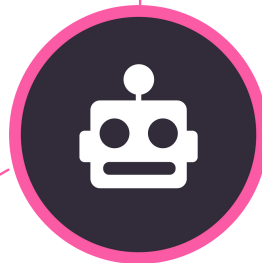


the trusted triad

THE BENEFITS OF THE AGENT-LENDER PARTNERSHIP

Create ease for your clients to build wealth through homeownership. Give them one-click access to the right expert at the right time.

Holly Homeowner
Empowered client



Wendi
Real Estate Agent



Michael
Loan Officer

Additional benefits for Agents:

- Can load up to 500 clients
- Access to Homebot for Buyers
- Optimized experience with POWER UPS
- Provide on-demand financial expertise

1

find leads

USE THE ACTIVITY FEED TO IDENTIFY CLIENTS SHOWING BUYING AND SELLING INTENT

1. Click on Active Homeowners.
2. Check the 'Hide clients that only have views' box to display your most high-intent homeowners.
3. Review the Activity Feed tags to discover potential sellers.

Activity feed

All Active Homeowners Active Buyers Hide clients that only have views

Eric Stanton explored market temperature explored cash position explored market temperature adjusted cash position viewed home viewed home 11 minutes ago

Angie Angel messaged you messaged you messaged you adjusted years in home adjusted years in home adjusted years in home viewed home 18 hours ago

Eric Anderson messaged you messaged you viewed home clicked listing clicked listing favorited listing very active buyer first time on listing search searched listings searched listings new listing search new listing search 18 hours ago

Skye Abbot messaged you 8 times messaged you 7 times first time on listing search searched listings searched listings 18 hours ago

Adam Adams buyer viewed markets tuned val updated updated Over the last 30 days

Eric Stanton training+erica@homebot.ai

HOME 2705 W 33rd Ave, 80211 Sold on Aug 17, 2010 for \$287,000 2 Beds, 2 Baths, 1014 Total SqFt 30 Year Loan for \$283k at 4.625% \$536k Estimated Value - (\$312k in equity) Preview Digest Manage

ALL ACTIVITY

Eric messaged you about what they could sell for: "Do you know any buyers who would be interested in my home?" a few seconds ago

Eric viewed home's market stats a few seconds ago

Eric viewed the digest from the email a few seconds ago

Eric viewed your Homeowner video message a few seconds ago

Eric explored market temperature 25 minutes ago

Eric adjusted cash position scenario 25 minutes ago

Eric explored cash position scenarios 25 minutes ago

Eric viewed home's market stats 25 minutes ago

GIVE ERIC A CALL

2 create call lists

Review your Activity Feed for key indicators & create a list of potential sellers:

Client Name	Phone Number	Zipcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

KEY INDICATORS

requested cma

viewed new home panel

viewed home's market

explored cash position

started buyer onboarding

explored home appreciation

adjusted cash position

viewed home's market

explored market temperature

Example questions to ask your clients:

"I noticed you tuned the value of your home, are you interested in a professional CMA?"

"I noticed you've been looking at the purchase module, is your home still working for you?"

3 filter by equity

PART 1: TURN HOMEOWNERS INTO LISTINGS

1. Farm leads by sorting homeowners by *highest equity*.
2. Preview clients digest and review their selling position.
3. Call clients in good selling positions and ask them if they're interested.

Your homeowners

All (16) Needs CMA (3) Shared Clients

Search name or address... x

1 double click arrows

CLIENT	VALUE	EST. EQUITY	EST. BALANCE	RATE
Angel, Angie 840 E Elm St Sent 3/8	\$320,000	\$143k • 44.6%		
McGarvey, Lance 4138 E Wading Pond Dr Sent 3/16	\$292,000	\$144k • 49.2%		
Stearns, Irene 8182 N Streamside Ave Sent 3/9	\$214,000	\$172k • 80.3%		
McGregory, Karol 11532 N Kriscott Ct Sent 3/12	\$331,000	\$191k • 57.8%		

2 80211 is in demand and holding steady ↔
Take a look

3 There are 27 homes in your market that are selling in around 76 days

Homes in 80211 on average have:

3.6	3.3	2,790
Beds	Baths	Sqft

THINKING OF SELLING YOUR HOME?

Now might be a good time - You have 2 strong selling signals

- Slow home value growth
Your home grew only 1.9% / year
- Good cash position
You've built around ~\$312k in equity
- In demand market
Competition is high, inventory is low

More details on this

4 cross-reference clients

PART 2: DISCOVER POTENTIAL BUYERS FOR YOUR HOMEOWNERS

Pull up your laptop screens side-by-side (or screen share on Zoom) and cross-reference your database of Homeowners and Buyers:

- Sorting your buyers by *price point*
 - Do you have or know of any listings you could present to them?
- Sorting your homeowners by *value*
 - Click to view their details and understand their positioning.
 - Reach out: Are they willing to sell and match a buyer's purchase price?
 - Do you have homeowners from step 1 willing to sell?

TIP: Focus on Buyers with potential move dates.

REVIEW HOMEOWNERS

Smith, Lauren 807 E 10th Ave Sent 3/11	\$574,000	\$574k • 100.0%	No data	No data
McGregory, Karol 11532 N Kriscott Ct Sent 3/12	\$331,000	\$191k • 57.8%	\$140k	4.875% Estimated

MATCH TO BUYERS

Angie Angel ✎	
<div>Buyer profile</div> <ul style="list-style-type: none">\$ Price point: 350K★ Buyer type: Buy different home📅 Move date: Sep 01, 2021✅ Viewed 3/16📅 Next report: 4/15 - 4/25❤️ Favorite markets: 85741, 85719	<div>Preview Report</div> <div>Send Report</div>

5 create call lists

Review your Homeowners tab for high equity clients and create a list of potential sellers. Compare to your list of Buyers & partners Buyers in Homebot.

Potential Seller	Phone Number	Zipcode	Buyer

Example questions to ask your clients:

"I noticed your market is in high demand and you're in a great cash-out position, are you interested in exploring selling? I have an Agent partner with some interested buyers."

"I wanted to check in, I was reviewing my past accounts and noticed you're in a great cash position - have you considered selling and pocketing the cash?"

collaborate on videos

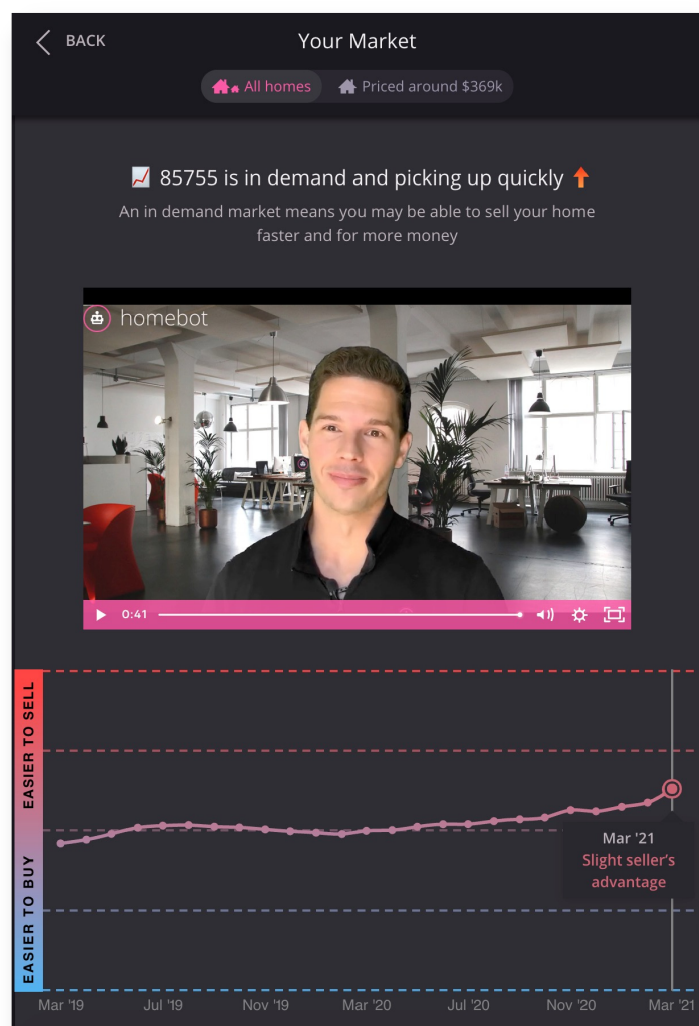
SCALE YOUR EXPERTISE WITH VIDEO MANAGER

When working strategically alongside your partner, create videos that supplement each other's real estate knowledge and expertise.

How it works

- Upload short and engaging videos to Homebot.
- Clients will see your custom videos while viewing their Homebot reports.

The Lender's finance-related videos will show for the Agents' clients, creating a closed loop of communication!



Best Practice

- Pick a date to get together to create your videos for Homebot.
- Download our [Video Manager scripting workbook](#) for a list of our video options.
- Get on camera together & do what you do best: give clients the information they need to make the right decisions at the right time.
- Edit, upload, and high-five! You've just leveled up your Homebot!

Learn more about Video Manager [here](#).



VISIT OUR [HELP CENTER](#)

for tutorials, videos, and step-by-step best practices.

Some of our most popular & relevant resources:

- How to farm Homeowners for leads ([LINK](#))
- How to farm Buyers for leads ([LINK](#))
- Use Your Activity Dashboard to Understand Client Engagement ([LINK](#))
- How to use Video Manager ([LINK](#))
- Everything you need to know about the 'Should You Sell' feature ([LINK](#)).

Ready to get started? [Login](#).

CONTACT US

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Email us at customersuccess@homebot.ai