WORKSHOP

Adding and Managing Clients

on Homebot

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Learn how to...

- ✓ **ADD** CLIENTS INTO HOMEBOT
- ✓ **SET UP** YOUR WORKFLOW
- ✓ **MANAGE** NOTIFICATIONS FROM CLIENTS
- ✓ **START SHARING** HOMEBOT

FOR MORE INFORMATION: Adding buyers/prospects into Homebot requires a Lender Co-Sponsor. Contact customersuccess@homebot.ai, and they will assist you with data import or any questions you may have.

PART 1

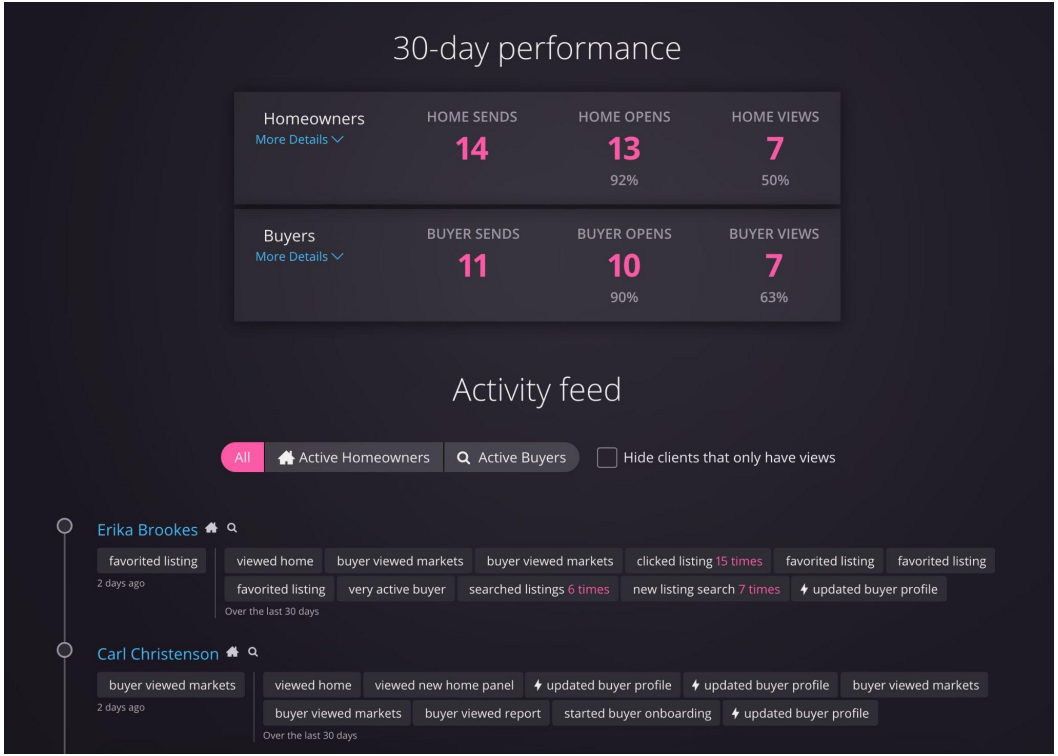
Add Clients into Homebot

Importing clients and prospects

By uploading clients and prospects to Homebot:

- ➔ Clients are automatically nurtured monthly
- ➔ Build a database with rich behavioral insights
- ➔ Clients contact you directly, no outreach necessary*
- ➔ Plus, Homebot will alert you weekly with your most engaged clients

*though highly recommended



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Add clients one at a time

You can manually add clients with just a bit of information:

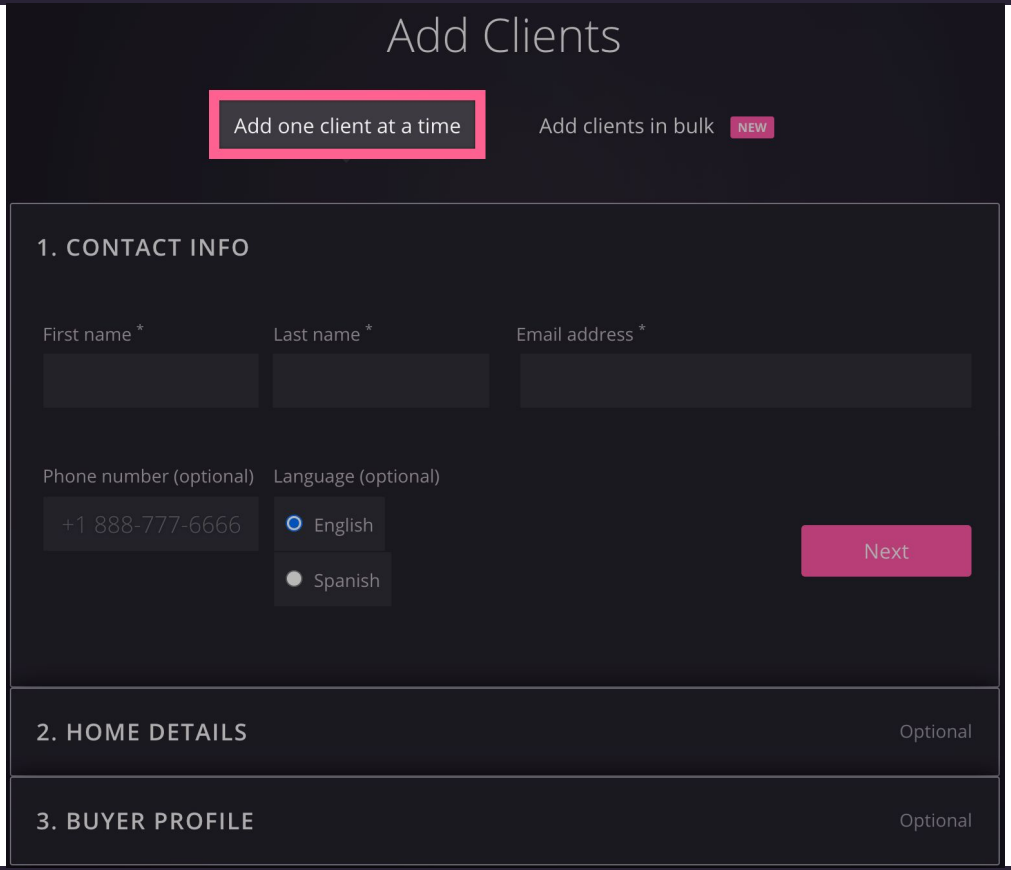
For HOMEOWNERS

- ❑ First & last name
- ❑ Email address
- ❑ Property address

For BUYERS (available with a Lender Co-Sponsor)

- ❑ First & last name
- ❑ Email address
- ❑ Activate Buyer Profile in Step 3

Be sure to add yourself as a client!



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Upload your clients in bulk

Whether you're using a CRM/LOS tool or a spreadsheet to track your client data, it couldn't be easier to transfer your clients into Homebot.

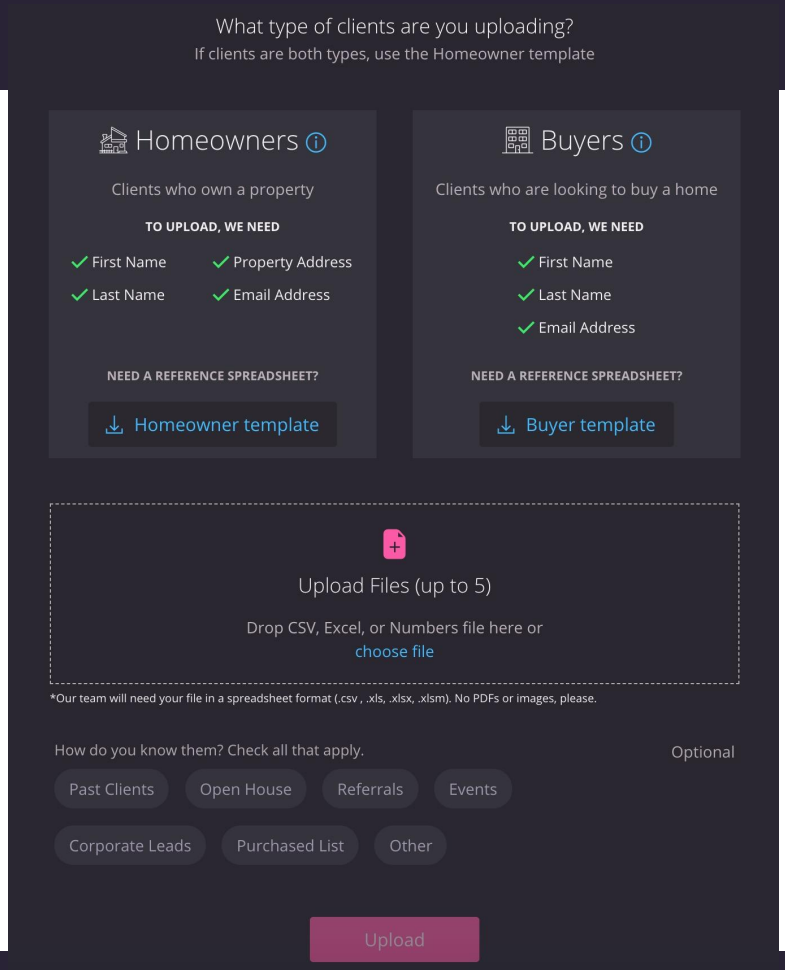
★ See our resources for exporting your data or contact us directly for support, customersuccess@homebot.ai

Be sure to add:

➔ Your past clients, sphere of influence, and opted-in leads (networking, farming, open houses, internet)

➔ Prospects interested in purchasing*

*available with a Lender Co-Sponsor



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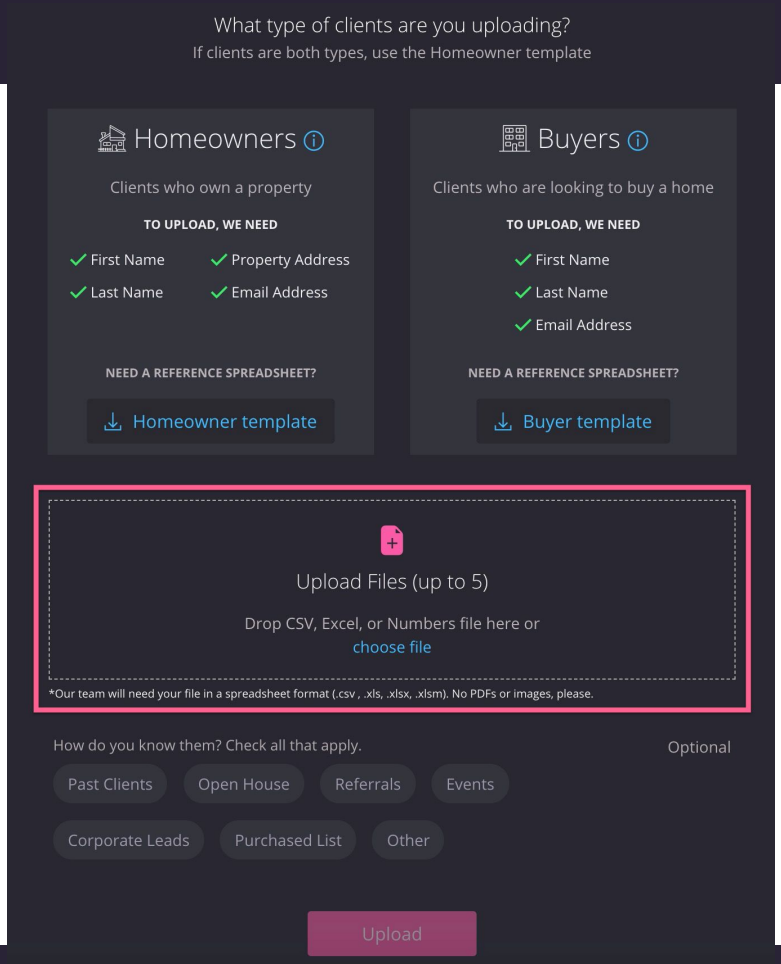
Upload your clients in bulk

Now that your data is prepared and ready to go, you can upload it directly into your Homebot account via .xlx, .xlxs, or .csv

- ➔ Our data team will confirm your upload via email
- ➔ Give the team 3-5 business days to go ensure the team has everything they need
- ➔ Once your data is successfully imported, they'll notify you directly
- ➔ If you have any questions, you can email the team anytime



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Maintaining Client Data

Strategy #1: Add it to your closing process

Once you have all your past clients imported, ensure new clients are registered for Homebot once they close on a home.

Strategy #2: Upload on a schedule

Depending on your volume of business, plan to upload your recent closings monthly or quarterly.

PART 2

Managing Notifications from Clients

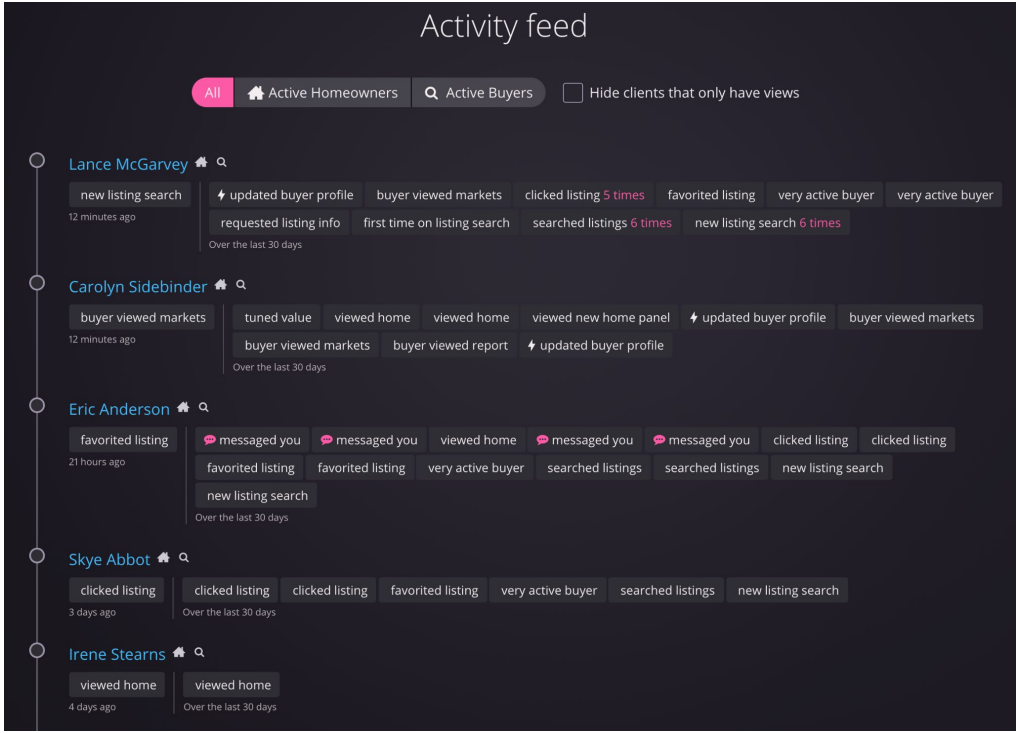
Leverage rich behavioral data

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

- Filter by client type
- Check box to 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.

- Make time in your week to check your feed



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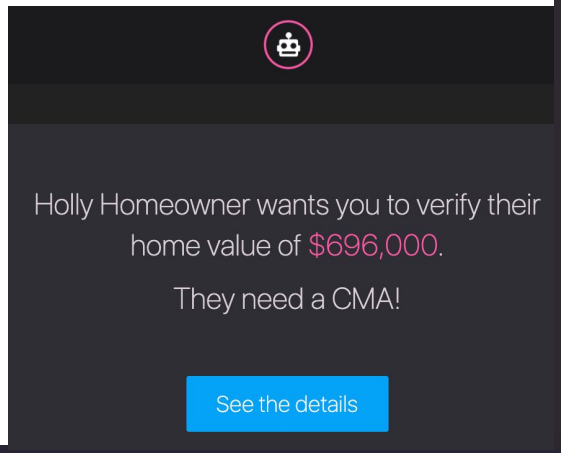
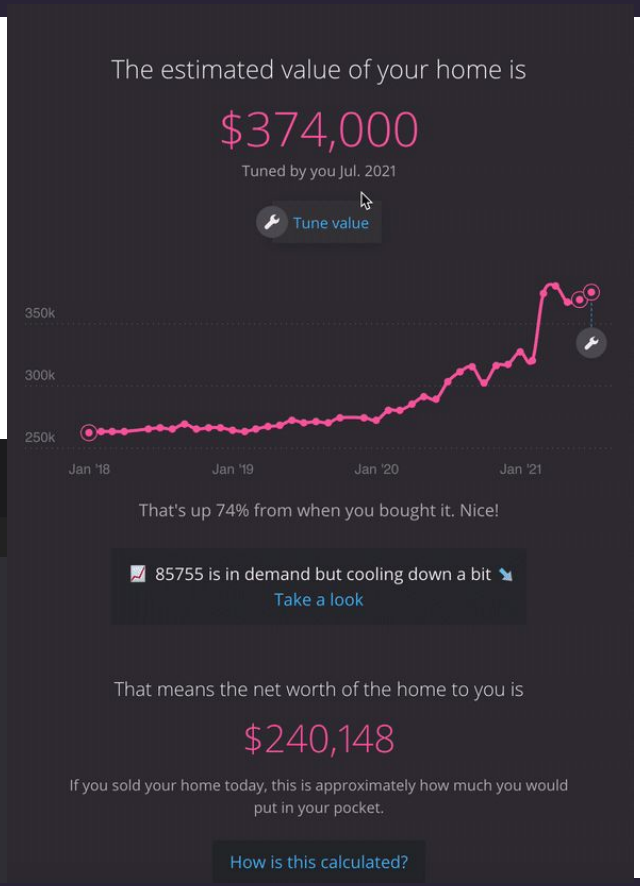
Managing CMA requests

Homeowners can request a CMA (Comparative Market Analysis) through the "Tune Your Value" feature in their digest.

CMA's are wonderful opportunities to:

- ➔ Ensure you stay top of mind if the homeowner is making any home changes.
- ➔ Touch base with your client and discuss their goals.





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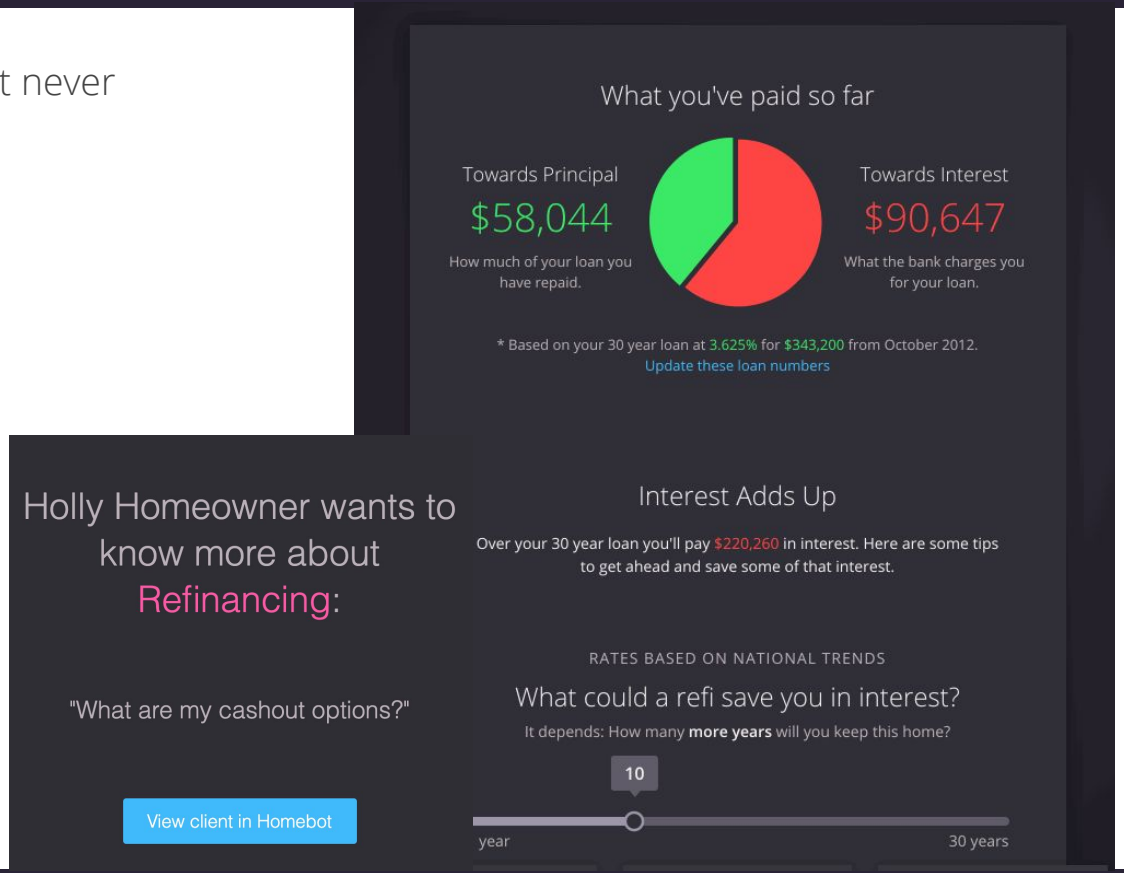
Managing financial inquiries

Create a full circle experience so your client never has to go anywhere else for help

Go above and beyond for your client by assisting them with their refinance needs

1. Call your client ASAP to see if they have a preferred lender
2. If not, connect them with a Lender in your network or add a Co-Sponsored Lender on Homebot

Click here to find out more about Lender Co-Sponsorship on Homebot



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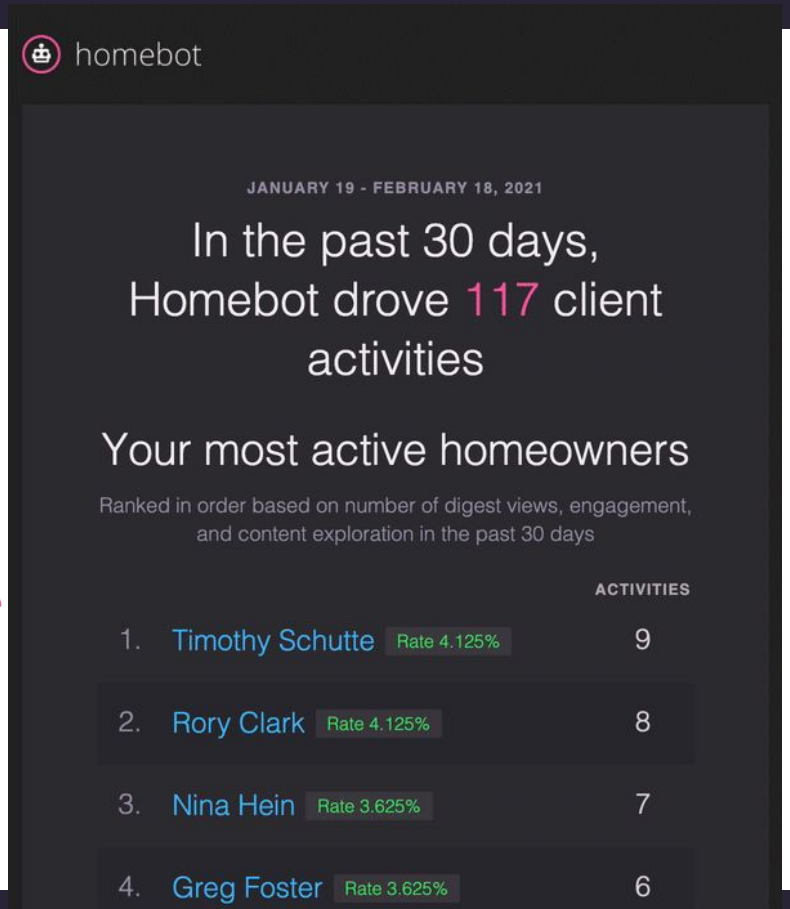
Weekly leads list

Every week, Homebot emails you a list of your

Top 10 most engaged homeowners & buyers



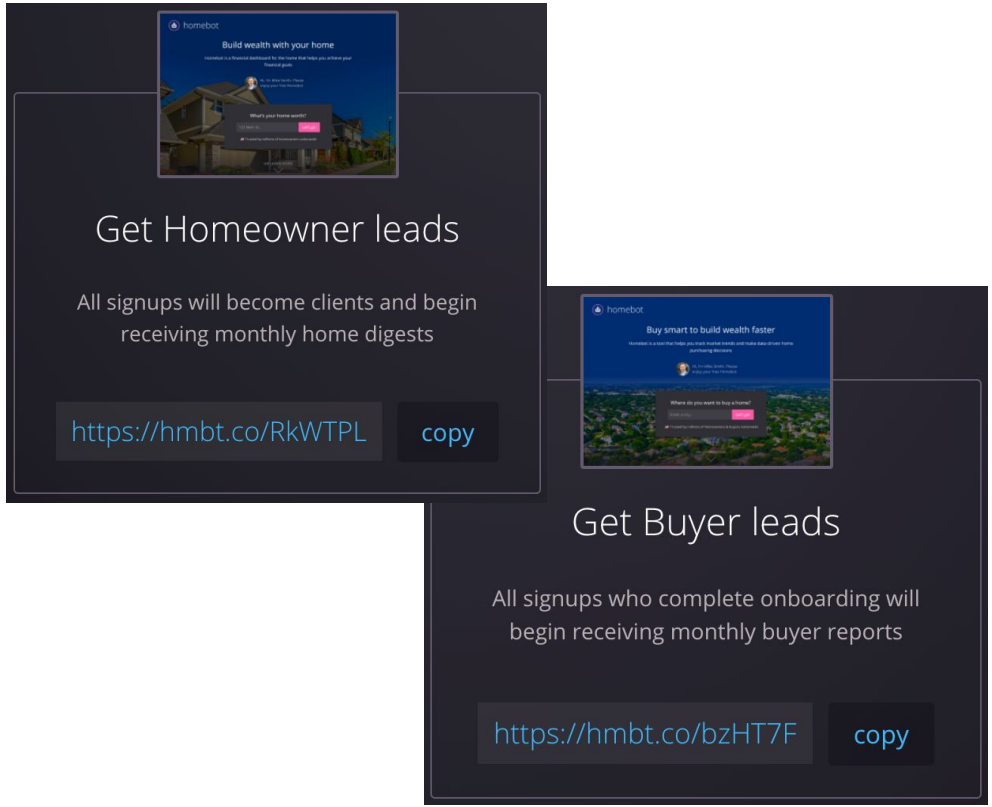
PART 3

Generating Leads with Homebot

Start sharing Homebot

Available in your **Share tab** are lead capture pages. 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 and as a nurture-resource for those leads



Bookmark our Learning Center for easy access to resources, shareable content, and best practices!

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Have additional questions?

For support with your account - CustomerSuccess@homebot.ai

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

DISCLAIMER: For more information on what is specifically available for your account, please contact customersuccess@homebot.ai and they will assist you accordingly.