

## WORKSHOP

# Adding and Managing Clients

on Homebot

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](mailto:customersuccess@homebot.ai), and they will assist you with data import or any questions you may have.



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PART 1

# Add Clients into Homebot

# Importing clients and prospects

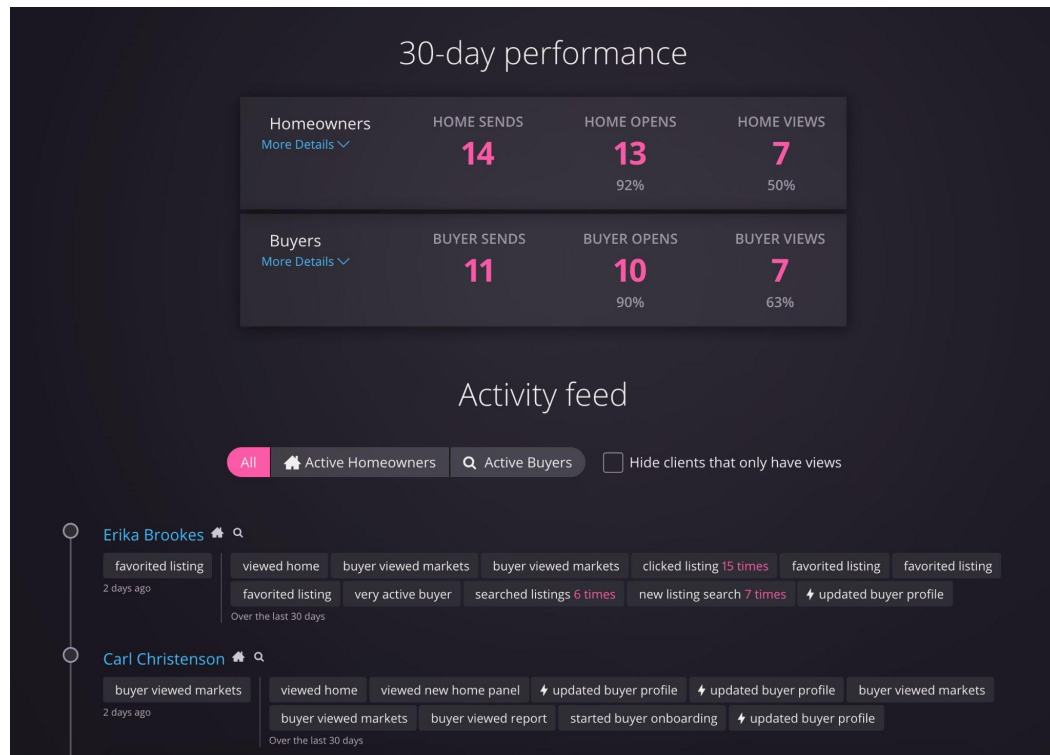
By uploading clients and prospects to Homebot:

- 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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## Add Clients

[Add one client at a time](#)[Add clients in bulk](#)NEW

### 1. CONTACT INFO

First name \*

Last name \*

Email address \*

Phone number (optional)

Language (optional)

+1 888-777-6666

☒ English  
☐ Spanish

Next

### 2. HOME DETAILS

Optional

### 3. BUYER PROFILE

Optional

# 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](mailto: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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What type of clients are you uploading?  
If clients are both types, use the Homeowner template

### Homeowners ⓘ

Clients who own a property

**TO UPLOAD, WE NEED**

- ✓ First Name
- ✓ Property Address
- ✓ Last Name
- ✓ Email Address

NEED A REFERENCE SPREADSHEET?

[↓ Homeowner template](#)

### Buyers ⓘ


Clients who are looking to buy a home

**TO UPLOAD, WE NEED**

- ✓ First Name
- ✓ Last Name
- ✓ Email Address

NEED A REFERENCE SPREADSHEET?

[↓ Buyer template](#)



Upload Files (up to 5)

Drop CSV, Excel, or Numbers file here or  
[choose file](#)

\*Our team will need your file in a spreadsheet format (.csv, .xls, .xlsx, .xlsm). No PDFs or images, please.

How do you know them? Check all that apply. Optional

Past Clients Open House Referrals Events

Corporate Leads Purchased List Other

[Upload](#)

# 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 .xlsx, .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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What type of clients are you uploading?  
If clients are both types, use the Homeowner template

 Homeowners ⓘ


Clients who own a property

**TO UPLOAD, WE NEED**

- ✓ First Name
- ✓ Property Address
- ✓ Last Name
- ✓ Email Address

NEED A REFERENCE SPREADSHEET?

[↓ Homeowner template](#)

 Buyers ⓘ


Clients who are looking to buy a home

**TO UPLOAD, WE NEED**

- ✓ First Name
- ✓ Last Name
- ✓ Email Address

NEED A REFERENCE SPREADSHEET?

[↓ Buyer template](#)



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Corporate Leads Purchased List Other

[Upload](#)

# 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

The screenshot displays the 'Activity feed' interface. At the top, there are filters: 'All' (selected), 'Active Homeowners', 'Active Buyers', and a checkbox for 'Hide clients that only have views'. The feed lists five clients, each with a vertical timeline of their activities:

- Lance McGarvey** (12 minutes ago): new listing search, updated buyer profile, buyer viewed markets, clicked listing 5 times, favorited listing, very active buyer, very active buyer, requested listing info, first time on listing search, searched listings 6 times, new listing search 6 times.
- Carolyn Sidebinder** (12 minutes ago): buyer viewed markets, tuned value, viewed home, viewed home, viewed new home panel, updated buyer profile, buyer viewed markets, buyer viewed markets, buyer viewed report, updated buyer profile.
- Eric Anderson** (21 hours ago): favorited listing, messaged you, messaged you, viewed home, messaged you, messaged you, clicked listing, clicked listing, favorited listing, favorited listing, very active buyer, searched listings, searched listings, new listing search, new listing search.
- Skye Abbot** (3 days ago): clicked listing, clicked listing, clicked listing, favorited listing, very active buyer, searched listings, new listing search.
- Irene Stearns** (4 days ago): viewed home, viewed home.



# Managing CMA requests

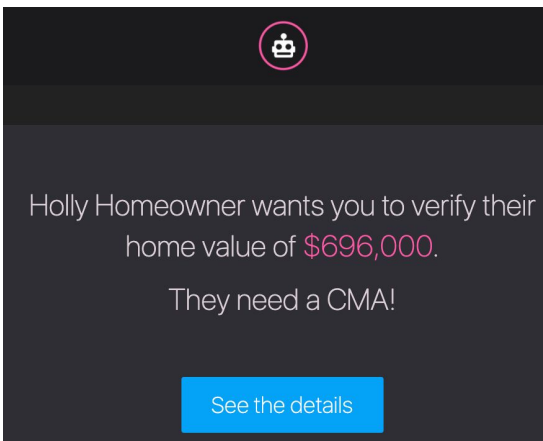
Homeowners can request a CMA (Comparative Market Analysis) through the "Tune Your Value" feature in their digest.

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.

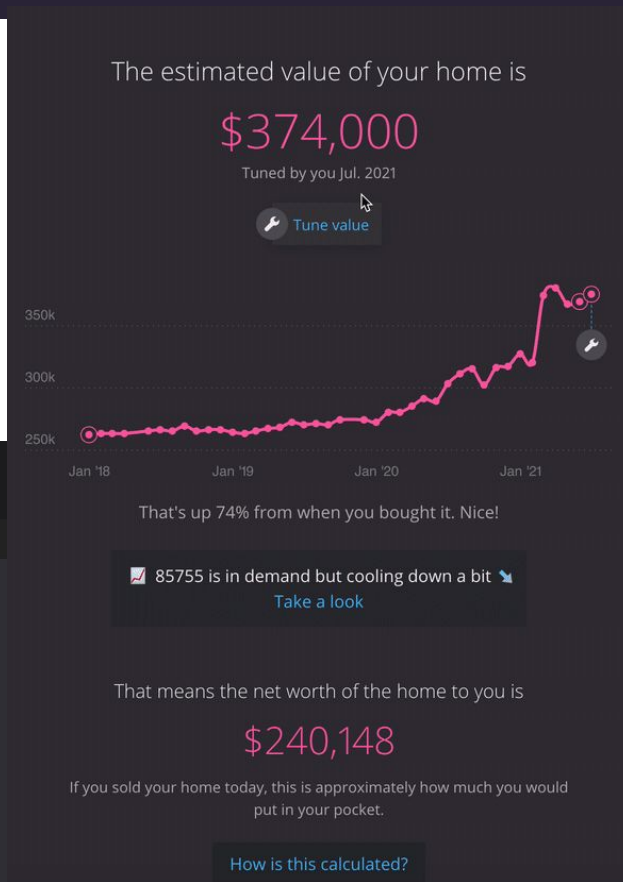


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A screenshot of the Homebot app interface. At the top, there is a circular icon with a robot head. Below it, the text reads: "Holly Homeowner wants you to verify their home value of \$696,000. They need a CMA!". At the bottom, there is a blue button that says "See the details".

Holly Homeowner wants you to verify their home value of \$696,000. They need a CMA!

[See the details](#)

A screenshot of the Homebot app interface showing a home value and market trends. The text reads: "The estimated value of your home is \$374,000 Tuned by you Jul. 2021". Below this is a "Tune value" button. A line graph shows the value trend from Jan '18 to Jan '21, with a significant increase. The text below the graph says: "That's up 74% from when you bought it. Nice!". Below the graph is a notification: "85755 is in demand but cooling down a bit" with a "Take a look" link. At the bottom, the text reads: "That means the net worth of the home to you is \$240,148". Below this is a note: "If you sold your home today, this is approximately how much you would put in your pocket." and a "How is this calculated?" link.

The estimated value of your home is \$374,000 Tuned by you Jul. 2021

[Tune value](#)

350k  
300k  
250k

Jan '18 Jan '19 Jan '20 Jan '21

That's up 74% from when you bought it. Nice!

85755 is in demand but cooling down a bit [Take a look](#)

That means the net worth of the home to you is \$240,148

If you sold your home today, this is approximately how much you would put in your pocket.

[How is this calculated?](#)

# 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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Holly Homeowner wants to know more about **Refinancing:**

"What are my cashout options?"

[View client in Homebot](#)

Interest Adds Up

Over your 30 year loan you'll pay **\$220,260** in interest. Here are some tips to get ahead and save some of that interest.

RATES BASED ON NATIONAL TRENDS

What could a refi save you in interest?

It depends: How many **more years** will you keep this home?

10

year

30 years

# Weekly leads list

Every week, Homebot emails  
you a list of your

**Top 10 most engaged  
homeowners & buyers**



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JANUARY 19 - FEBRUARY 18, 2021

In the past 30 days,  
Homebot drove **117** client  
activities

## Your most active homeowners

Ranked in order based on number of digest views, engagement,  
and content exploration in the past 30 days

### ACTIVITIES

- |    |                 |             |   |
|----|-----------------|-------------|---|
| 1. | Timothy Schutte | Rate 4.125% | 9 |
| 2. | Rory Clark      | Rate 4.125% | 8 |
| 3. | Nina Hein       | Rate 3.625% | 7 |
| 4. | Greg Foster     | Rate 3.625% | 6 |


## 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




Build wealth with your home

What's your home worth?

Get Homeowner leads

All signups will become clients and begin receiving monthly home digests

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



Buy smart to build wealth faster

Where do you want to buy a home?

Get Buyer leads

All signups who complete onboarding will begin receiving monthly buyer reports

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



# Homebot Learning Center for Agents

Find everything you need to become a master of your Homebot account. Don't have an account yet? [Get started!](#)

## A Complete Real Estate Agent's Guide to Homebot

Bookmark our [Learning Center](#) for easy access to resources, shareable content, and best practices!



### Getting Started

New to Homebot? Learn how to set your account up and get clients added.



### Best Practices

Ready to make the most of Homebot? Discover top producers Homebot hacks.



### Managing Clients

Stay on top of email issues and managing your client data.



### Lender Partnership



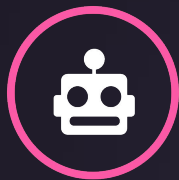
### Integrations + Tools



### Account & Billing



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# homebot

## Have additional questions?

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For support with your account - [CustomerSuccess@homebot.ai](mailto:CustomerSuccess@homebot.ai)

To upgrade, sign-up, or see a demo - [Sales@homebot.ai](mailto:Sales@homebot.ai)

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



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