

WORKSHOP

Getting Started

on Homebot

Learn how to...

- ✓ **PERFECT** YOUR HOMEBOT BRANDING
- ✓ **POWER UP** INTEGRATIONS & OPTIMIZE YOUR CLIENT EXPERIENCE
- ✓ **SET UP** YOUR WORKFLOW & MANAGE YOUR ACCOUNT
- ✓ **START SHARING** HOMEBOT

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.



homebot

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

Home Value Email

Every ~30 days, your client will receive a dynamic and personalized home value report so they can begin to understand their home as an investment:

- Track their home value over time
- Watch their equity grow
- Explore ways to save money
- Discover opportunities for leveraging their equity



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Hi Vince! Here's your current home report and tips on how to save money. Call or email with questions!

Talya Reynolds • Demo Mortgage, Inc.

720-415-4148 • talya@homebot.ai • NMLS #0001110010101

Your new home value estimate is ready.

See your value



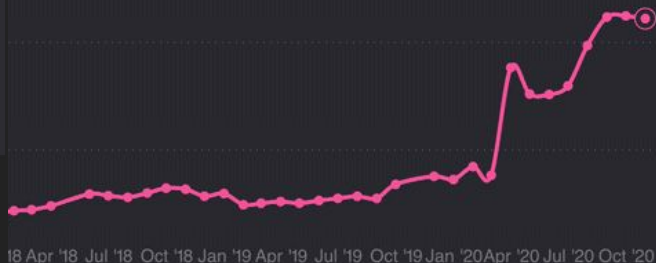
Talya Reynolds • Loan Officer
(720) 415-4148 • talya@homebot.ai
NMLS: #0001110010101
Demo Mortgage, Inc.

The estimated value of your home is

\$1,043,000



Tune value



Your Market Email

Two weeks after your client receives their home value email, they'll receive an email keeping them up to date on the market conditions in their area.

- Homeowners can compare their home to the local market by price and zip code.
- Ensure you're the first to know if your client is considering selling (and buying!)



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Buyers Report Email

Prospects and homeowners opted-in to buyers will receive an email monthly with their personalized buyer's report and access to Homebot's Market Explorer:

- Buyers can compare areas of interest, explore their buying timeline, and view homes from Homebot directly.
- Rich behavioral data is captured in their profile so you can contact your client at just the right moment.




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Markets around Greenwood Village are changing.

Keep your hand on the pulse by getting the latest market analysis.

[Explore](#)



Talya Reynolds • Loan Officer
(928) 300-4775 • talya@homebot.ai
NMLS: #0001110010101
1EG Mortgage, Inc.

Hi Jean! Here's your latest home buying analysis to help you find the best market and get the most value for your money. Call or email with questions!

Wendi Miller • Demonstration Real Estate, Inc.
970-708-0277 • nina+rea@homebot.ai

Your price point: **\$650,000** [Change](#)

OCTOBER 2020

How do your favorite markets stack up?

0 **MARKET TEMPERATURE** 100

BUYER'S MARKET **SELLER'S MARKET**

Better deals and less competition Rising values but more competition

MARKET TEMPERATURE BUYING TIMELINE SOFT YOU CAN AFFORD AVERAGE PRICE

Hampden South, Southmoor Park, The Corridor, Hampden, Greenwood Hills... **89 days** 2,405 sqft \$586k [View](#)

[Show more](#)

Exceptionally Sourced Data

HOME VALUE ESTIMATION

Homebot's data primarily comes from Black Knight, a premier provider of integrated technology, data, and analytics.

Their Paragon MLS service covers a vast majority of the U.S., and their advanced algorithms calculate the estimated values of homes.

Homebot leverages [Black Knight's](#) data and public record data to estimate home value.

MARKET DATA

We get market data from a best-in-class data company, [Altos Research](#), and listings data from our trusted partner, Ylopo.

INTEREST RATES

Interest rates are pulled every Thursday from Freddie Mac's national averages. We err on the side of conservative and provide only an estimated rate.



Checklist for Getting Started

- ❑ Perfect your branding
- ❑ Power Up your account
- ❑ Prepare & upload your client data
- ❑ Add Homebot into your workflow
- ❑ Start generating leads



PART 1

Perfecting your branding

1. Review your profile information

When the Co-Founders of Homebot asked homeowners who they wanted to receive these reports from - they said **you**.

That's why your branding is front & center for all things Homebot!

- Review your profile information to ensure all of your info is accurate.
- Upload your best headshot or team photo, so the first thing your client sees is a warm smiling face!




homebot

[PROFILE](#) [DIGEST SETTINGS](#) [BILLING INFO](#) [PASSWORD](#)

Profile

[Profile Details](#) [Brand Details](#) NEW

Set a profile photo
This photo will show up at the top and bottom of your clients' digests and enhances your personal branding. It's best to use a photo of yourself and not a logo here.

 [Update](#) [Remove](#)

First name*	Last name*
<input type="text" value="Erica"/>	<input type="text" value="Stern"/>
Email*	Mobile number*
<input type="text" value="erica@homebot.ai"/>	<input type="text" value="+1 720-432-1115"/>
Title	Your NMLS ID*
<input type="text" value="Loan Officer"/>	<input type="text" value="0000"/>
Website URL	LinkedIn URL
<input type="text" value="https://homebot.ai"/>	<input type="text" value="https://"/>

Customize your Brand Details

Enhance your profile with brand details

To attract Real Estate Agent partners and potential clients, include:

- ➔ Total years in mortgage industry
- ➔ What sets you apart from other lenders
- ➔ Personalized introduction video that will show across your partners co-branded digests.



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PROFILE

DIGEST SETTINGS

BILLING INFO

PASSWORD

Profile

Profile Details

Brand Details NEW

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?

What would my refi rate be?

Ask a question...

Mike Smith

303-555-5555

NMLS #99999999

12 YEARS IN INDUSTRY

Back to Refi options

Tell us a little bit more about your experience to use in your new branding.

ADD AN INTRO VIDEO [Customize](#)

How long have you been helping homeowners get loans?

If a prospective client asked you, what would you say sets you apart from other loan officers?

0/280 Characters

Save

2. Check your digest settings

Next up, be sure to review your digest settings.

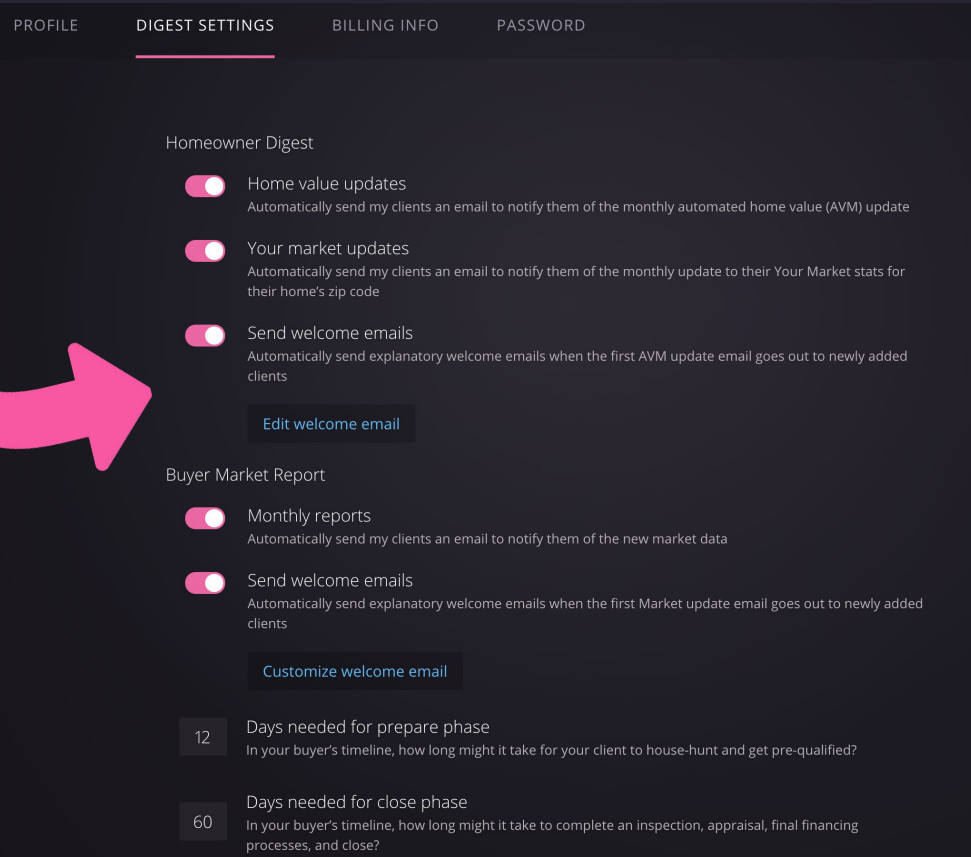
By default, Homebot has all your settings turned on so we can automatically nurture your clients monthly.

From your digest settings tab, you can:

- Turn on and off automatic emails
- Update & review your welcome emails
- Modify the prepare & close phase shown on purchase scenarios.



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A screenshot of the Homebot web application's 'DIGEST SETTINGS' page. The page has a dark theme with a top navigation bar containing 'PROFILE', 'DIGEST SETTINGS' (highlighted with a red underline), 'BILLING INFO', and 'PASSWORD'. The main content area is divided into two sections: 'Homeowner Digest' and 'Buyer Market Report'. Each section contains three toggle switches, all of which are turned on. Below the toggles in each section is a button to edit or customize the welcome emails. At the bottom, there are two input fields for 'Days needed for prepare phase' (set to 12) and 'Days needed for close phase' (set to 60). A large red arrow points from the text on the left towards the 'Homeowner Digest' section.

PROFILE DIGEST SETTINGS BILLING INFO PASSWORD

Homeowner Digest

- ☒ Home value updates
Automatically send my clients an email to notify them of the monthly automated home value (AVM) update
- ☒ Your market updates
Automatically send my clients an email to notify them of the monthly update to their Your Market stats for their home's zip code
- ☒ Send welcome emails
Automatically send explanatory welcome emails when the first AVM update email goes out to newly added clients
[Edit welcome email](#)

Buyer Market Report

- ☒ Monthly reports
Automatically send my clients an email to notify them of the new market data
- ☒ Send welcome emails
Automatically send explanatory welcome emails when the first Market update email goes out to newly added clients
[Customize welcome email](#)

12 Days needed for prepare phase
In your buyer's timeline, how long might it take for your client to house-hunt and get pre-qualified?

60 Days needed for close phase
In your buyer's timeline, how long might it take to complete an inspection, appraisal, final financing processes, and close?

3. Customize your welcome email

Reviewing the welcome email is a significant first step; understand the report's main talking points while also finding areas to add your personal touch.



The screenshot shows a user profile for Talya Reynolds with a circular profile picture. Below the name are four tabs: PROFILE, DIGEST SETTINGS (which is underlined with a red line), BILLING INFO, and PASSWORD. The DIGEST SETTINGS section is divided into two parts: Homeowner Digest and Buyer Market Report. Each part contains three toggle switches, all of which are turned on. For Homeowner Digest, the toggles are for 'Home value updates', 'Your market updates', and 'Send welcome emails'. For Buyer Market Report, the toggles are for 'Monthly reports' and 'Send welcome emails'. Below the Homeowner Digest toggles is a button labeled 'Edit welcome email'. Below the Buyer Market Report toggles is a button labeled 'Customize welcome email'.

Talya Reynolds

PROFILE DIGEST SETTINGS BILLING INFO PASSWORD

Homeowner Digest

- ☒ Home value updates
Automatically send my clients an email to notify them of the monthly automated home value (AVM) update
- ☒ Your market updates
Automatically send my clients an email to notify them of the monthly update to their Your Market stats for their home's zip code
- ☒ Send welcome emails
Automatically send explanatory welcome emails when the first AVM update email goes out to newly added clients

[Edit welcome email](#)

Buyer Market Report

- ☒ Monthly reports
Automatically send my clients an email to notify them of the new market data
- ☒ Send welcome emails
Automatically send explanatory welcome emails when the first Market update email goes out to newly added clients

[Customize welcome email](#)



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PART 2

Powering up your Homebot

Electrify & Amplify Client Engagement

Electrify & amplify client engagement by leveraging Homebot tools & integrations



Customize

POWER UPSVIDEOS

Learn about this

Make your life easier and electrify your client engagement by connecting your existing tools and adding new ones

Video Email

Engage with your clients with an impactful video message before they view their digest.

Get Started

SMS Outreach

Allow clients to sign-up and to receive Homebot updates via text message

BETA Request early access!

Mortgage Coach

Provide a personalized Total Cost Analysis directly from the refi module

Connected

BombBomb

Record and send your clients a personalized video about their digest or markets

Connected

Sales Boomerang

Make outreach easy by powering lead alerts with Homebot data

BETA Request early access!

Home Search

POWERED BY YLOPO

Allow your clients to search for homes while remaining the main point of contact

Connected

Zapier

Automate client data syncing between Homebot and your preferred CRM

BETA Request early access!

Custom Listings

Tailor your clients search listing platform to guide them to their perfect home

Get Started

Integrate with your favorite tools + take advantage of the ones we made for you!



Please note: POWER UPS may vary by plan and are only available on PRO
Email: sales@homebot.ai to upgrade
Email: customersuccess@homebot.ai with questions.



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Power Up with Mortgage Coach


Take your homeowner empowerment to the next level while furthering your clients down your funnel with Mortgage Coach's total cost analysis.

→ Clients can compare rates + savings at the click of a button, allowing them to compare options and creating an opportunity for a meaningful conversation.

Note: To enable this feature, you must have a Mortgage Coach subscription.




















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Mortgage Coach

Provide a personalized Total Cost Analysis directly from the refi module

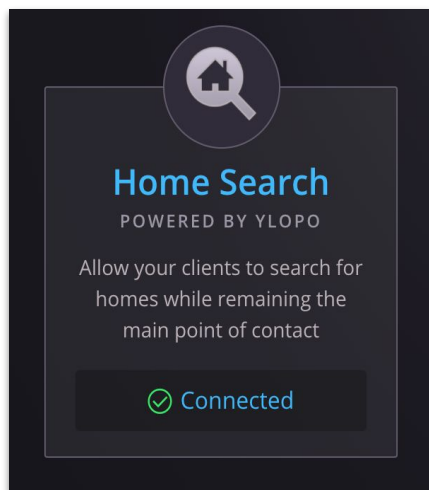
 **Connected**

15 Year Fixed \$56,463 2.50% Rate • 2.536% APR  Long term savings  Payment might go up by \$652/mo  Rate is estimated What's your rate?	25 Year Fixed \$28,641 3% Rate • 3.044% APR  Long term savings  Payment might go down by \$19/mo  Rate is estimated What's your rate?	30 Year Fixed \$25,023 3% Rate • 3.044% APR  Long term savings  Payment might go down by \$202/mo  Rate is estimated What's your rate?
5/1 ARM \$6,866 3.125% Rate • 3.297% APR  Risky after 10 years Payment might go up by \$155/mo Rate is estimated What's your rate?	7/1 ARM \$13,758 SAVED OVER 7 YEARS 3.125% Rate • 3.171% APR  Risky after 7 years  Payment might go down by \$179/mo  Rate is estimated What's your rate?	5/1 ARM \$8,643 SAVED OVER 5 YEARS 3.125% Rate • 3.171% APR  Risky after 5 years  Payment might go down by \$179/mo  Rate is estimated What's your rate?

Power Up with Home Search

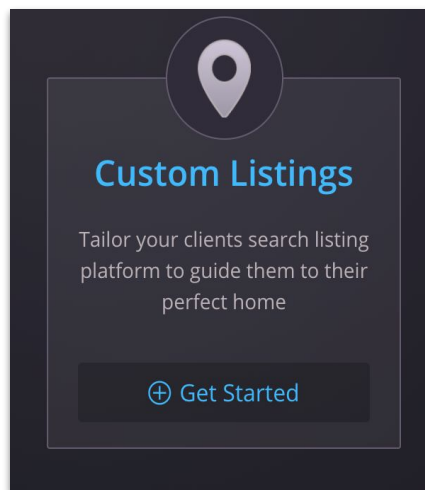
LENDERS

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

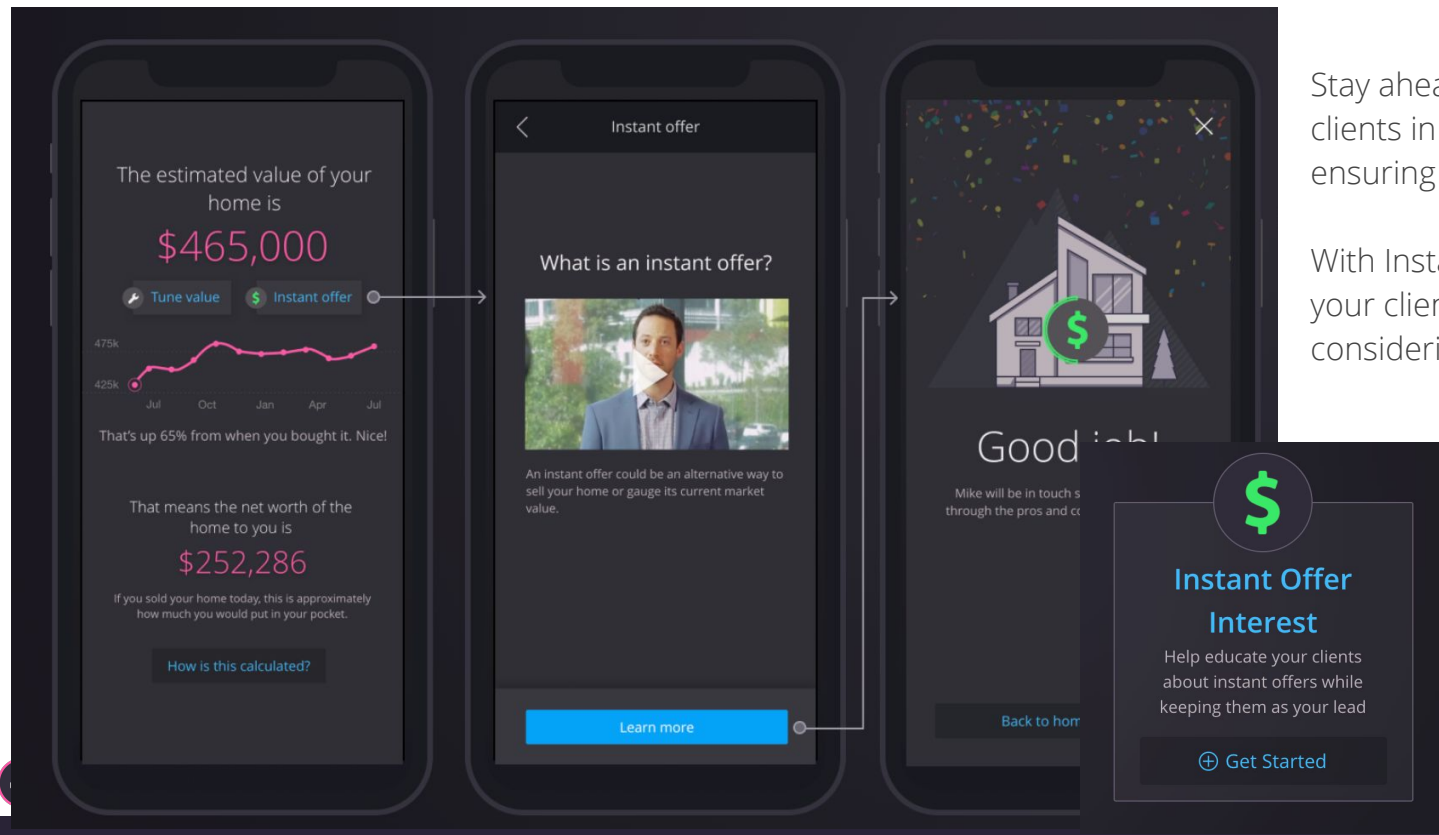
Home Search by Ylopo enables your clients to easily navigate to a custom home search right from their market explorer:

- Click on the **Customize** tab, activate the *Home Search by Ylopo* POWER UP & let it do the rest.
- **TIP:** Once powered on, send a video email to your buyers to show them the new feature!

The screenshot displays the 'Home Search' interface, which is part of the 'homebot' app. At the top, there's a navigation bar with 'Clients', 'Agents', 'Share', 'Customize' (highlighted in red), and 'Account'. Below this, the 'Home Search' title is accompanied by a magnifying glass icon and the text 'POWERED BY YLOPO'. The main content area is divided into three sections: 'HOMES', 'MARKETS', and 'BUYING REPORT'. The 'HOMES' section shows a map of a neighborhood with a red outline indicating the search area. The 'MARKETS' section displays a line graph showing home values over time, with a text overlay stating: '80027 has a **seller's advantage**, meaning there's decent competition and home values are growing steadily — probably a great investment!'. The 'BUYING REPORT' section lists three properties with their addresses, prices, and features. Below the map, there's a 'View more 80027 homes' button. On the right side, there's a 'STATUS' section with a green checkmark indicating the search is 'Added Mar 20, 2020' and a red '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 of the screen features a 'homebot' logo and a red chat bubble icon.

homebot

Instant Offer Interest



Stay ahead of competitors and keep clients in your sphere of influence by ensuring they hear from you first.

With Instant Offer Interest, ensure your client talks to you first if they're considering selling their home.

Video Email

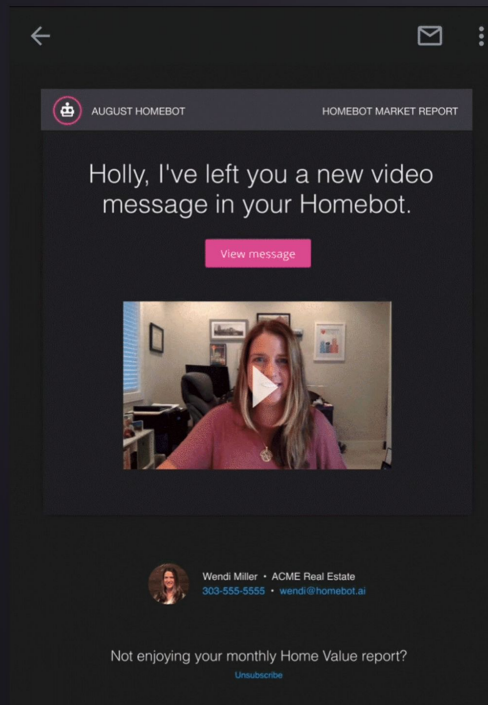
Engage clients and gain interest using **Video Email**:

1. Introduce your clients to the report they'll be receiving
2. Call attention to relevant features to capture your client's interest
3. Show them how they can use various features to discover important information
4. Follow up monthly and keep clients up-to-date on market trends
5. Call down the list once they've received their video & report



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Video Email



Video Email

Create a video with BombBomb, PitchHub or YouTube to send to all your clients. You can send up to **one** video each week for homeowners or buyers.

Your clients will view your video in their Homebot.

CHOOSE YOUR AUDIENCE

Homeowners

Send to all your clients who own a home

[Get Started](#)

Buyers

Send to all your clients who have a buyer profile

[Get Started](#)

Ripe for Refi

Send to all your clients with homes possibly eligible for a refi

[Get Started](#)

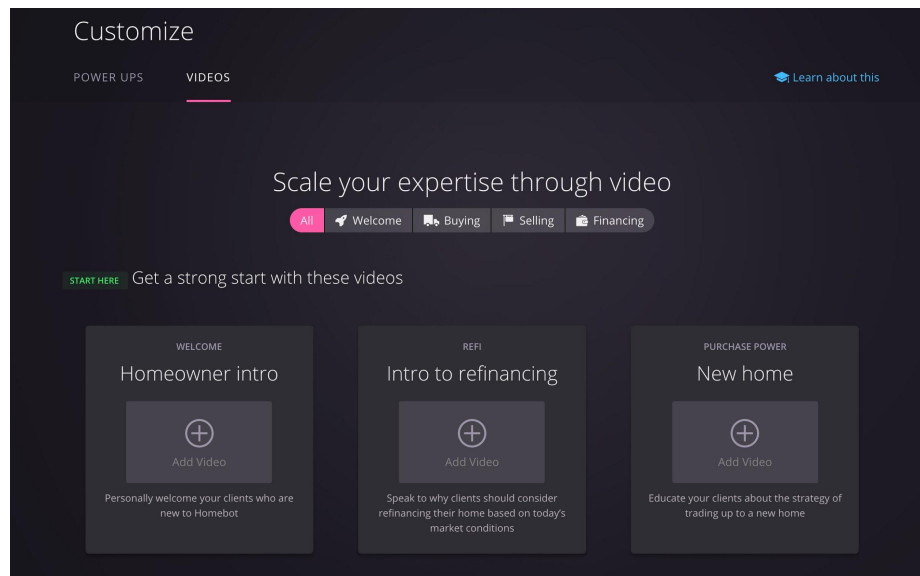
Video Manager

Communicate with your entire database by adding custom videos throughout the Homebot tool.

1. Easily scale your expertise
2. Set it & forget it
3. Position yourself as the expert
4. Weave your brand throughout the Homebot report

Types of videos that work well with Video Manager:

- Warm introduction videos - "I'm here to help!"
- Highlight Homebot features - "Discover what you can afford using the equity in your home!"



PART 3

Adding Clients to Homebot



Adding clients to Homebot

By uploading your 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























homebot

30-day performance			
 Homeowners More Details ▾	HOME SENDS 313	HOME OPENS 176 56%	HOME VIEWS 126 40%
 Buyers More Details ▾	BUYER SENDS 110	BUYER OPENS 57 51%	BUYER VIEWS 22 20%

Activity feed

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

- Jesse**   
 -  viewed home 4 days ago
 -  viewed home Over the last 30 days
- Talya Reynolds**  
 -  updated buyer profile 7 days ago
 -  updated buyer profile Over the last 30 days
 -  updated buyer profile
 -  updated buyer profile
 -  updated buyer profile
 -  updated buyer profile
- Dev**    
 -  buyer viewed markets 8 days ago
 -  viewed home Over the last 30 days
 -  buyer viewed markets

Add clients one at a time

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

For **HOMEOWNERS** (at minimum)

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

For **BUYERS** (at minimum)

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



homebot

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 or LOS tool to track your client data or leveraging our templates, 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
- Prospective clients you've talked to
- All pre-quals sitting in your database



homebot

Add Clients

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

BULK UPLOAD

[Need help?](#) [View Help Article](#)

last uploaded **June 4, 2021**

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
- ✓ Last Name
- ✓ Email Address
- ✓ Property Address
- ✓ Loan Information
- ✓ NMLS ID

NEED A REFERENCE SPREADSHEET?

[Download 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?

[Download Buyer template](#)

[Choose file](#)

or drag and drop here

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

Homeowner - Required Fields

Required Fields for Basic Import:

- Borrower First Name
- Borrower Last Name
- Borrower Email
- Property Address
- Property Zip

A unique email is required for co-borrower to be added (cannot be same as borrower's email)

If you don't have the loan details, Homebot will automatically pull loan data from public records.

Required Fields for Loan Data Import:

- Total Loan Amount
- Interest Rate
- Loan Term (# of Months)
- Loan Purpose (Refi, Purchase, Etc)
- Closing Date
- NMLS Loan Originator ID
- NMLS Loan Type
- Lender NMLS ID

We'll use your loan data in conjunction with the public record to populate the most accurate data:



Homeowner - Highly Recommended Fields

These are especially important if you are in rural areas or non-disclosure states.

- Sold Price
- Appraised Value
- Borr & Co-Borr DOBs (MM/DD/YYYY) to activate the reverse mortgage module
- Monthly Mortgage Insurance Premium
- Loan Number (can be used in the future when integrating with the Homebot API)



Buyer Fields

Required Fields for Basic Import

- First & last name
- Email

Highly Recommended Fields

- Zipcodes of interest
- Max Loan Amount
- Downpayment
- Max Home Price
- Preapproved

Additional Fields Available

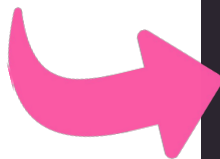
- Estimated Rate
- Loan Type
- Loan Term Months
- Loan Adjustable
- Loan ARM Years Initial
- Expires At



Uploading your clients


Once you've prepared your data, all you have to do is drag and drop it into your Homebot account!

Be sure to tell us about your client data, so we can properly import your list to the right area!



homebot

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
- ✓ Last Name
- ✓ Email Address
- ✓ Property Address
- ✓ Loan Information
- ✓ NMLS ID

NEED A REFERENCE SPREADSHEET?

[Download 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?

[Download Buyer template](#)

 Choose file
or drag and drop here

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

How do you know them? Check all that apply.

Past Clients Open House Referrals Events

Corporate Leads Purchased List Other

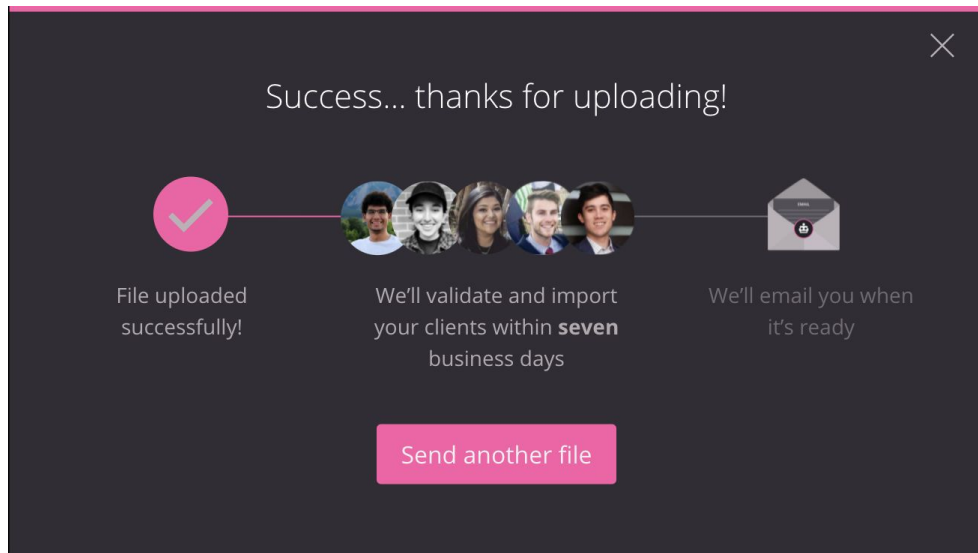
Optional

[Upload](#)

Uploading your clients

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
- Once your data is successfully imported, they'll notify you directly
- If you have any questions, you can email them directly anytime!



Maintaining Client Data



Strategy #1: Add it to your closing process

Once you have all your closed loans imported, ensure new clients are registered for Homebot once their loan closes.



Strategy #2: Upload on a schedule

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



PART 4

Prepare your workflow



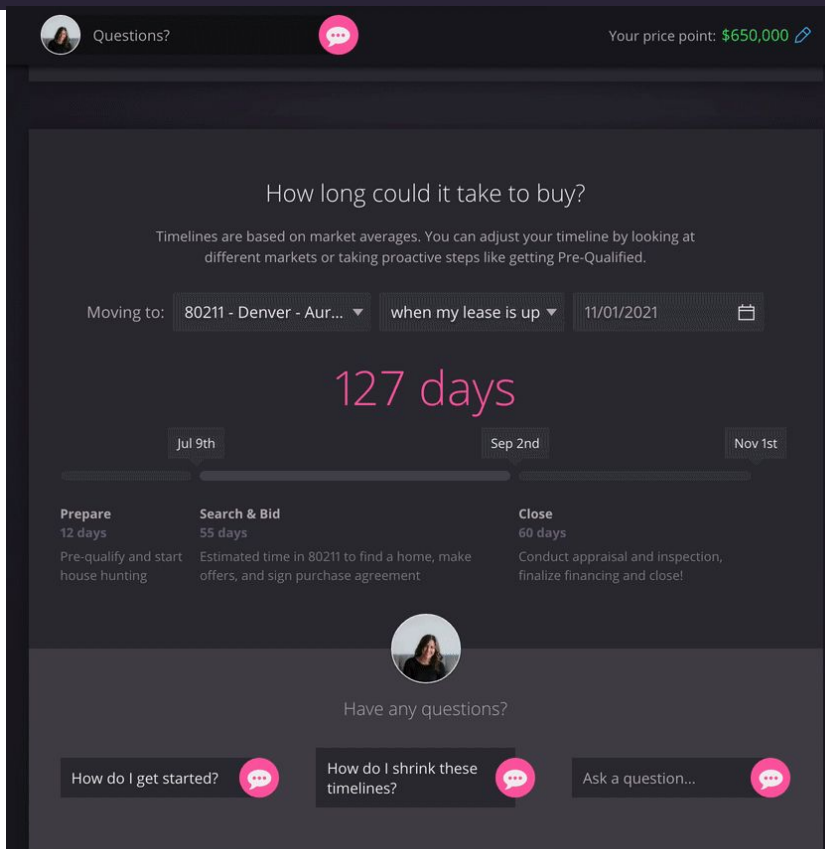
Creating clients for life

Your clients will be able to call and message you at the click of a button - prompting you with a multitude of opportunities to talk to your clients directly:

1. Leverage client messages to differentiate yourself from multi-billion dollar competitors.
2. Treat every inbound message as an opportunity to connect with your client.
3. Align your client's mortgage to their financial goals.



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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:

- Strengthen or expand your agent network.
- 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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The estimated value of your home is

\$752,000

 [Tune value](#)



That's up 63% from when you bought it. Nice!

☒ 80138 is in demand and picking up quickly 
[Take a look](#)

That means the net worth of the home to you is

\$275,796

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



Holly Homeowner wants you to verify their home value of **\$696,000**.

They need a CMA!

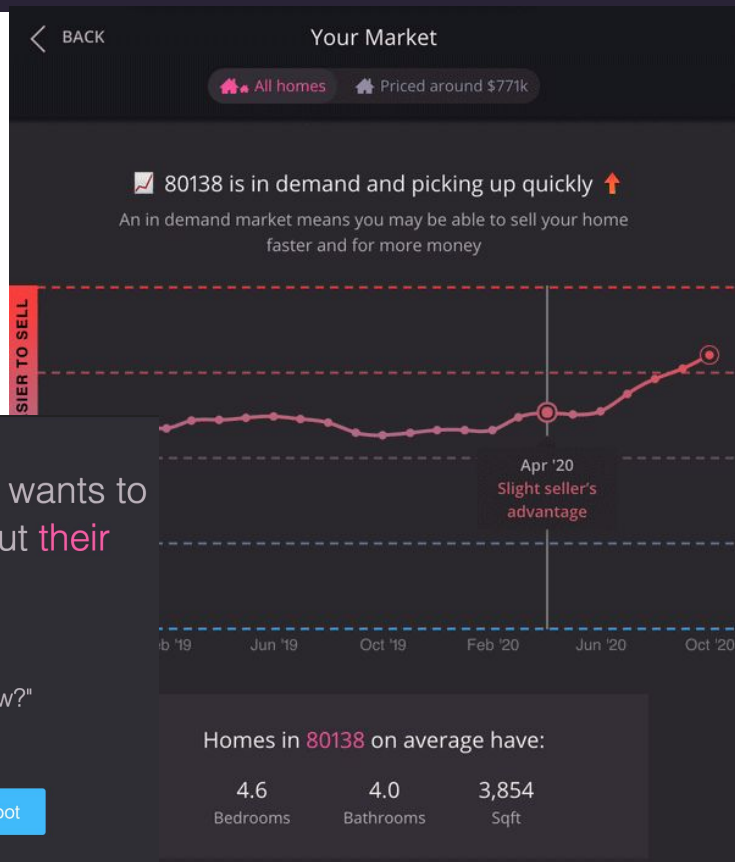
[See the details](#)

Market Conditions

1. Pick up the phone and call your client
 - ◆ See how they're doing & what they have in mind. Is your client considering selling? Do they need a realtor?
 - ◆ Get them pre-approved or pre-qualified.
2. Strengthen or expand your agent network
 - ◆ No realtor? Let me connect you w/ my realtor, who specializes in that area.
 - ◆ Have a realtor? Introduce yourself & hand them a packaged hot lead
3. Ask for a referral
 - ◆ Since your client has found it so helpful, encourage your client to share Homebot with their friends & family.



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Selling Temperature

Homeowners can better understand their selling position, based on the following factors:

1. Home appreciation or depreciation
2. Cash position
3. Market temperature or demand in the market
 - Clients can reach out to you for more information
 - Respond by asking if your client is working with an agent or if you can refer someone you trust in your network.



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THINKING OF SELLING YOUR HOME?

Now might be a good time - You have 3 strong selling signals



High appreciation

Your home value grew 8.5% / year



Good cash position

You've built around ~\$259k in equity



In demand market

Competition is high, inventory is low

[More details on this](#)

Eric Anderson wants to know more about **if they should sell:**

"How's the market for buying?"

[View client in Homebot](#)

Refinancing

Homebot is an amazing conversation starter - providing eligible client's insight into possible refi scenarios.

We'll email & text you every time your client requests more information:

1. Email your client ASAP
2. Provide a detailed estimate with their specific loan rates
3. Follow up with a phone call to see if they have any questions



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Holly Homeowner wants to know more about
Refinancing:

"What are my cashout options?"

[View client in Homebot](#)

What you've paid so far

Towards Principal
\$58,044

How much of your loan you have repaid.



Towards Interest
\$90,647

What the bank charges you for your loan.

* Based on your 30 year loan at **3.625%** for **\$343,200** from October 2012.
[Update these loan numbers](#)

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

Additional opportunities

Go beyond the call of duty for your clients while generating new referrals.

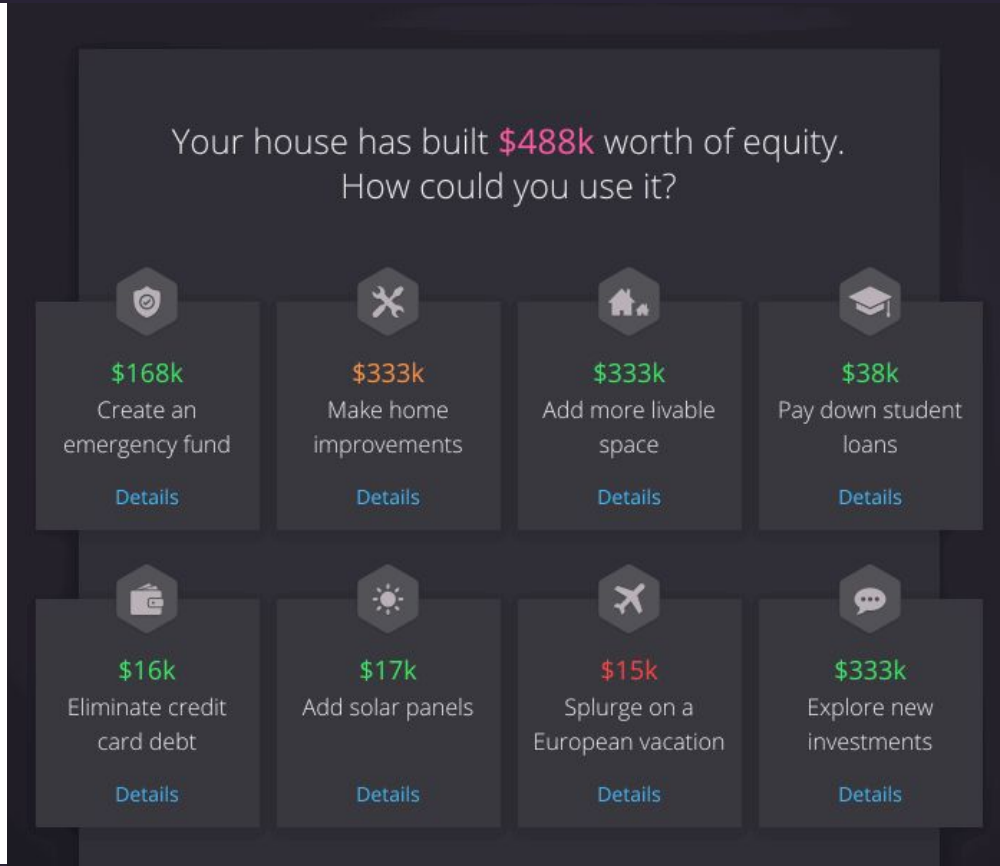
Review your contacts for:

- Financial advisors
- Debt specialists
- Contractors & green energy companies

Send inquiries to the specialists - when they say thanks, ask them to share Homebot with their family & friends!



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Managing Referrals

As your referrals start rolling in, be sure to consider your welcome strategy & if prospects need to be added to other campaigns or resources.

- ★ Pick up the phone and introduce yourself
 - See how they're enjoying the report & if they have any questions.
 - Let them know they can reach out any time with questions.



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One of your clients submitted a referral!

Shazam! Chana Homeowner just joined Homebot, and they will be associated with you as their professional. You might want to thank Breanne Cunningham!

Details:

- **Name:** Chana Homeowner
- **Address:** 3091 Promenade, 92626
- **Email Address:** talya+chanahb@homebot.ai

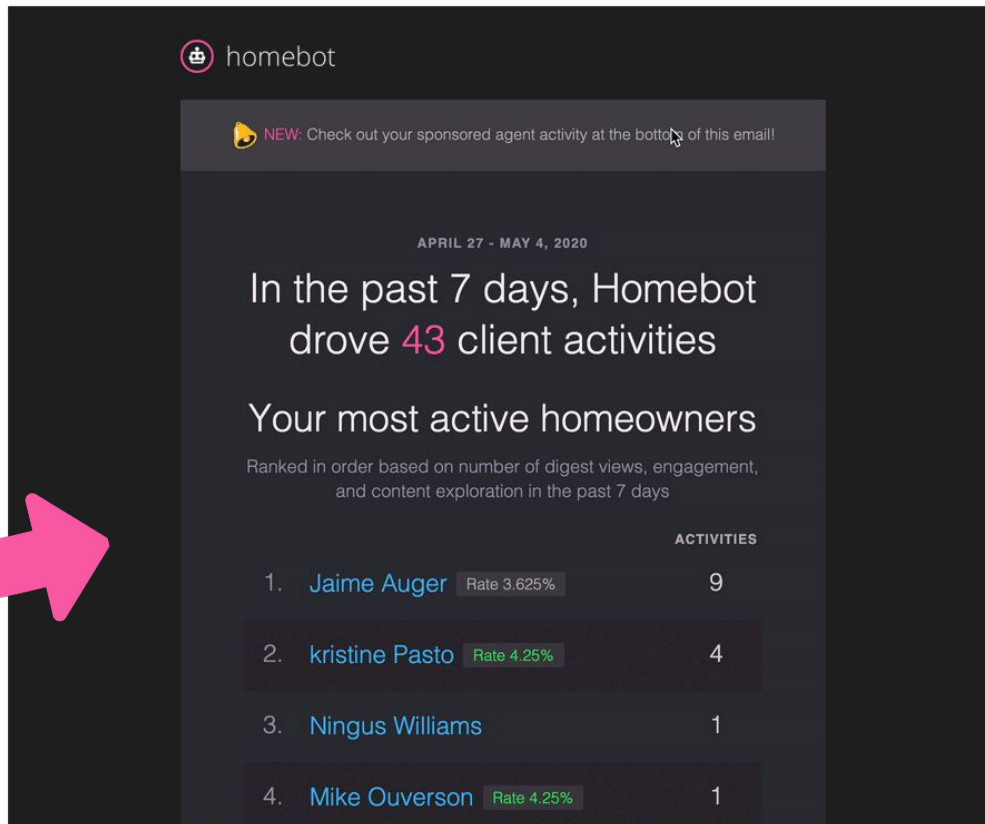
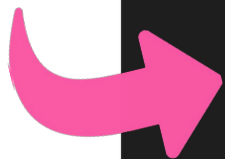
Want to see their home and loan details? Log in and view their digest:

[Go to client page](#)

Weekly lead lists

Every week, Homebot emails
you a list of your

**Top 10 most engaged
homeowners & buyers**



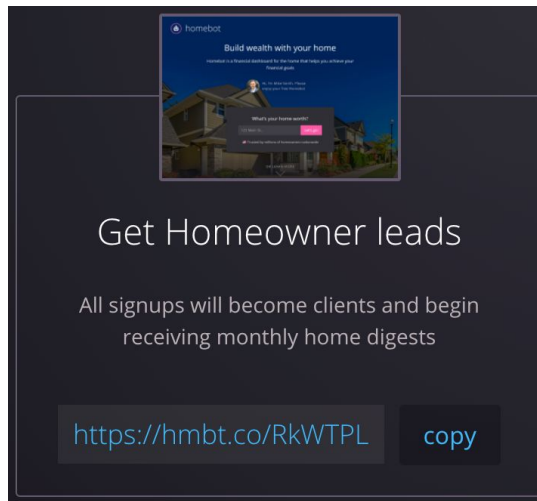
PART 5

Generating Leads with Homebot

Personalized lead capture page

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.



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Build wealth with your home

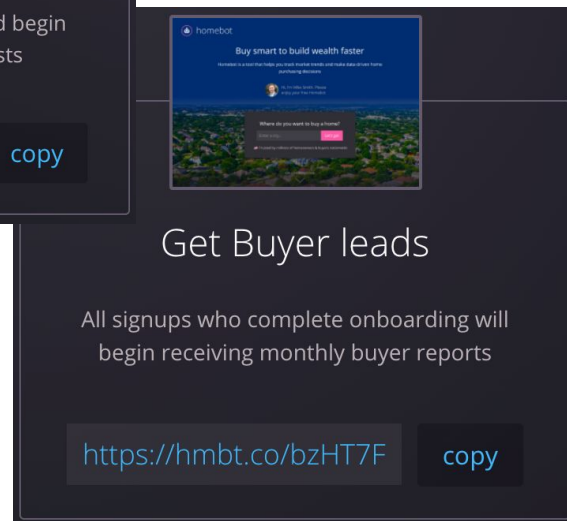
homebot is a digital dashboard for the home that helps you afford your home goals

What's your home worth?

Get Homeowner leads

All signups will become clients and begin receiving monthly home digests

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



homebot

Buy smart to build wealth faster

homebot is a digital dashboard for the home that helps you afford your home goals

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](#)



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!

The collage features three main components:

- Zillow Screenshot:** A Zillow homepage for the 80212 zip code. It displays a map of the area, a 'Typical Home Value' of \$578,873, and a '1-Year Forecasted Value Increase' of 6.9%. It also lists '63 Homes for Sale' and '25 Homes Recently Sold'. Below the map, there are sections for 'Popular homes in 80212' and 'Recently sold homes in 80212', each showing three property cards with photos, prices, and basic details.
- Homebot Screenshot:** A screenshot of a Homebot chat interface. It shows a search bar with 'Updated Home Search' and a list of search results. The first result is a 'Back On Market' listing for 4901 Decatur Street, Denver, Colorado 80221, priced at \$449,990. The second result is a 'New Listing' for 4695 Osceola Street, Denver, Colorado 80212, priced at \$440,000. The third result is another 'New Listing' for 3655 Ames Street, Wheat Ridge, Colorado 80212, priced at \$469,973. Each listing includes a brief description and a 'View Details' link.
- Market Report Graphic:** A graphic titled 'MARKET REPORT' for 'DENVER REAL ESTATE - OCTOBER 2020'. It features a large image of a modern living room. The report highlights key statistics: 'SINGLE FAMILY' average sales price of \$599,418 (13% change 1 yr), 'MEDIAN DAYS ON MARKET' of 6 (62% change 1 yr), and 'CONDO' average sales price of \$384,397 (2% change 1 yr), 'MEDIAN DAYS ON MARKET' of 9 (90% change 1 yr). It also includes a 'DENVER METRO' logo and a 'LIVEURBANDENVER.COM/MARKETREPORT' link.



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Leverage Partnerships

Take your reach to the next level
by sponsoring agents

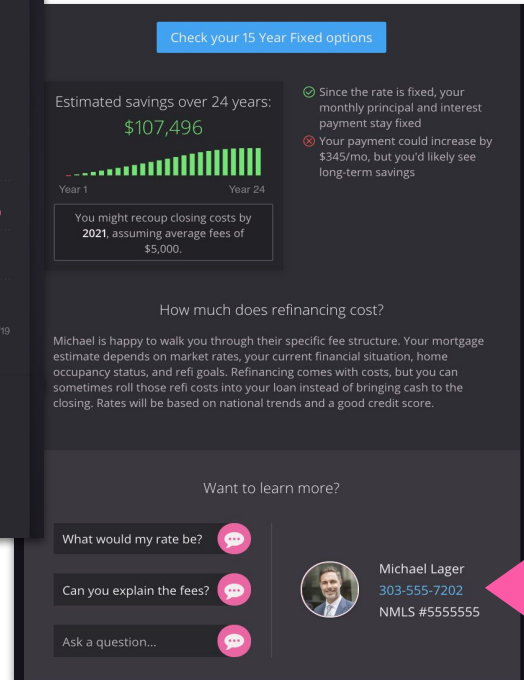
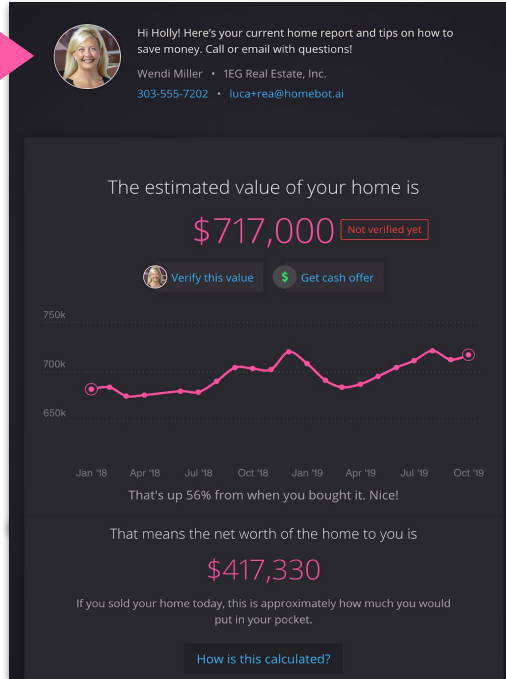
	Co-Sponsored Agents	Price Per Agent	Bonus* Agents
Tier 1	1-4	\$25 / Month	—
Tier 2	5-14	\$20 / Month	1
Tier 3	15-29	\$15 / Month	4
Tier 4	30+	\$10 / Month	14

Special pricing may apply if you're on a company account - email customersuccess@homebot.ai for details.



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AGENT



LENDER



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Build Wealth



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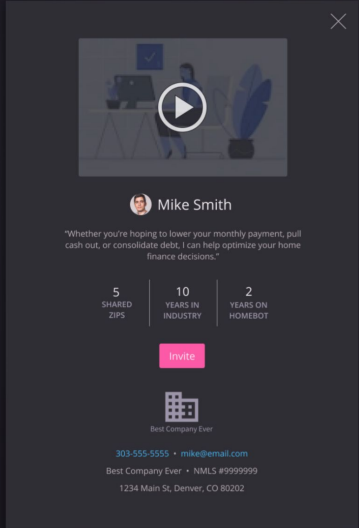
Customize your Co-Sponsorship Profile

Upload a 'Pitch an Agent' video

This video will show for eligible Real Estate Agents looking for a co-sponsor on Homebot

- Introduce yourself
- Tell the agent what makes you a great partner
- Encourage them to reach out to you or let them know you've sent them an invite.

← Pitch an Agent



Mike Smith

"Whether you're hoping to lower your monthly payment, pull cash out, or consolidate debt, I can help optimize your home finance decisions."

5 SHARED ZIPS	10 YEARS IN INDUSTRY	2 YEARS ON HOMEBOT
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Invite

Best Company Ever

303-555-5555 • mike@email.com
Best Company Ever • NMLS #9999999
1234 Main St, Denver, CO 80202

Pitch an Agent


Create a message for agents who are looking for a loan officer to co-sponsor them in Homebot. You can tell them about why you might make a great co-sponsor!

THE AUDIENCE

Eligible real estate agents looking for a co-sponsor

STATUS

✓ Added May 11, 2021 [Edit](#)






Invite your agent(s)

Enter their information to automatically send them an invite.

Invite real estate agents to accelerate your business



Send Directly
Have a Homebot crafted email sent to your favorite agents

First Name *

Wendi

Last Name *

Agent


Email *

wendi@agent.com

Phone

+1 720-432-1115

Send Invite



Share your link
Post to your social media accounts or present at an event

Your custom link

<https://join.homebot.ai/sponsor/323>

Copy

Want your agents to try Homebot for free?

☒ Let agents choose between a free or paid plan


Or, send them your custom link, which they can use to get started.



BONUS: Agent FREEMIUM

Have an agent on the fence? Want to go wide with your realtor marketing efforts? With **Freemium**, agents can test Homebot for **free**!

Invite real estate agents to accelerate your business


 **Send Directly**
Have a Homebot crafted email sent to your favorite agents

First Name *

Last Name *

Email *

Phone

 **Share your link**
Post to your social media accounts or present at an event

Your custom link

☒ **Want your agents to try Homebot for free?**
Let agents choose between a free or paid plan

- Ability to add up to 25 clients
- Unlimited access to Homebot until they're ready to upgrade
- Robust onboarding program
- Dedicated support center & phone support



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<https://admin.homebotapp.com/agents/invite>

Resources for building your agent network on Homebot

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 presentation with agents in your network!



Agent Invite Templates

Jump start your agent invite process by using our agent email invite templates. Copy and paste into your email client.



One-Pager for Inviting Agents

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

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



Bootcamp for Agents

Send this link to agents who are interested in learning more about joining you on Homebot.



Homebot for Agents One-Pager

Check out our one-pager to download and share with your agents. Be sure to link to your personal agent invite landing page.



Homebot for Agents Video Explainer

This short video is great for adding to your presentations on Homebot or sending to an agent partner for a quick explainer.

A Complete Lender's Guide to Homebot

Have you joined our Facebook Mastermind Community? [Sign up here.](#)



Getting Started

New to Homebot? Learn how to set your account up and get your first client.



Best Practices

Ready to make the most of Homebot? Discover the best practices for your business.



Mastermind Community

Stay on top of email issues and managing your business with our Mastermind Community.



Agent Sponsorship

Discover strategies to expand your reach and capture new clients with agent co-sponsorship.



Integrations + Tools

Power up your Homebot by integrating it with some of your favorite tools + discover new ones.



Account & Billing

Need to update your account? Learn how to manage your account settings and subscription.

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: 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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