

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:

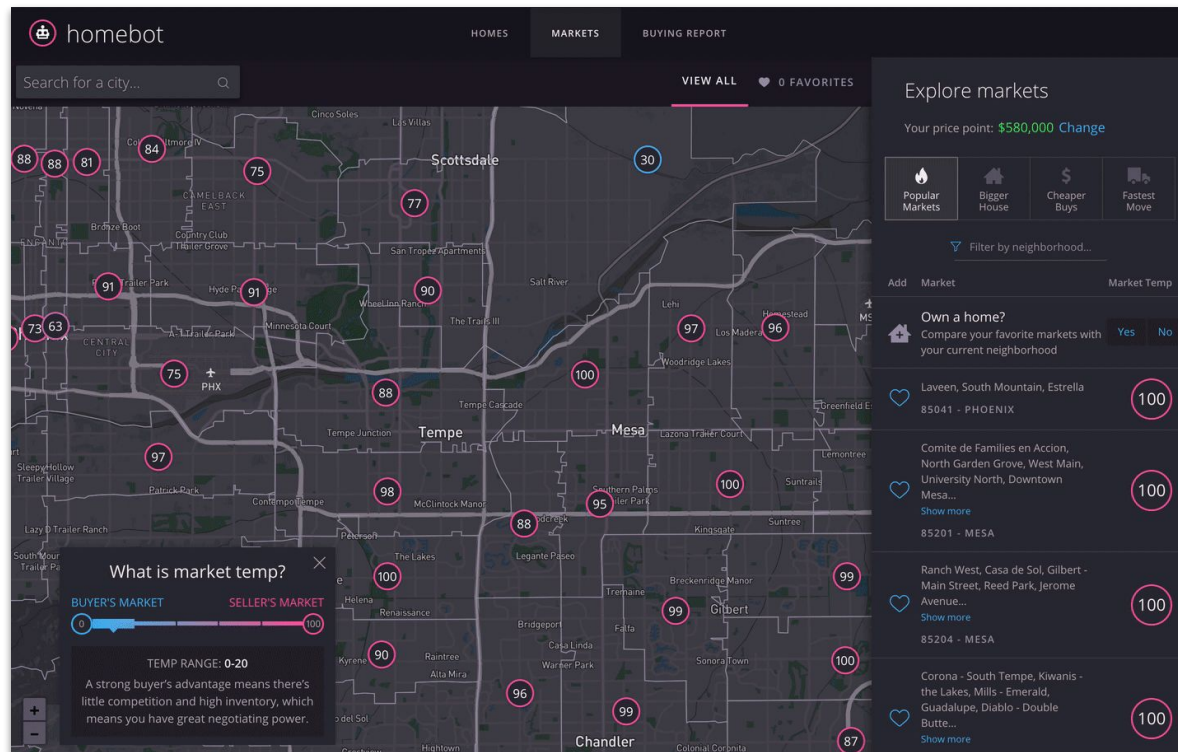
- Search markets based on their purchasing goals
- Compare areas of interest
- Learn about the market firsthand
- Ask educated questions

The screenshot displays the Homebot app interface. At the top, there's a navigation bar with 'homebot' logo, 'HOMES', 'MARKETS', and 'BUYING REPORT' tabs. 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 a welcome message to 'JULIE' and asking '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:'. Then, it asks 'Where are you house hunting?' with another search bar. To the right, there's a sidebar titled 'Explore markets' showing a 'Your price point: \$650,000 Change' and a list of neighborhoods with their market scores. The neighborhoods listed are: Northeast Lakewood, Two Creeks, North Alameda, Barths, Edgewater... (score 97), 80214 - LAKEWOOD, North Park Hill, South Park Hill, Northeast Park Hill, East 29th Avenue, East Colfax... (score 96), 80207 - DENVER, Deer Creek, Homestead, Hilldale Pines, Pleasant Park Corridor, Indian Hills... (score 96), 80465 - MORRISON, Del Mar Parkway, Northwest Aurora, Highland Park, Highline Villages, Expo Park... (score 95), and 80010 - AURORA.

Leveraging Market Explorer

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

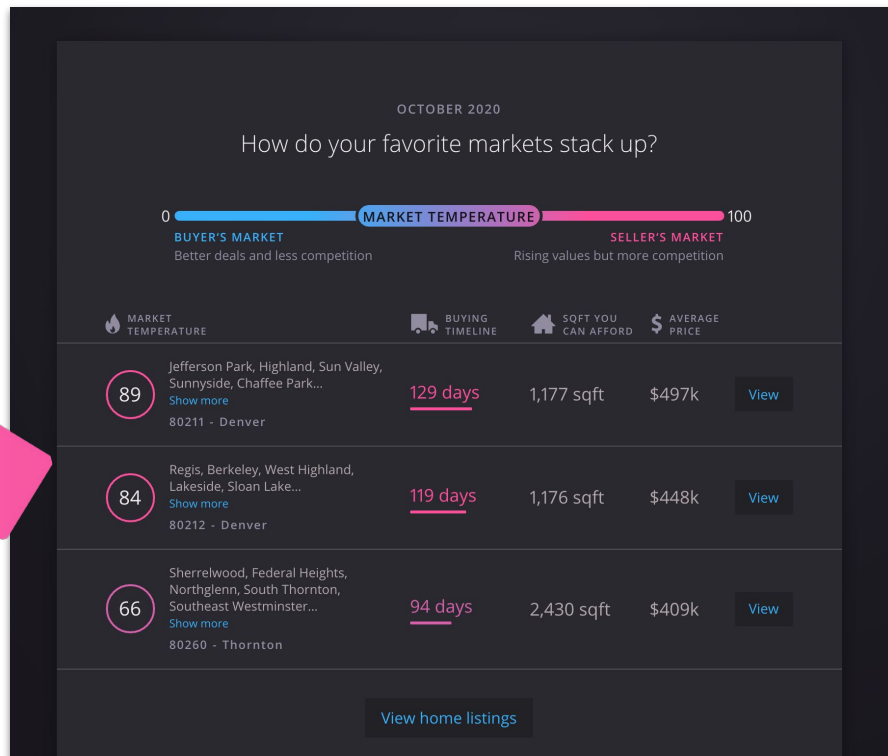
- Getting detailed property and market insight
- Favoriting markets to add them to their buyers report
- Viewing homes — directly from Homebot



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.



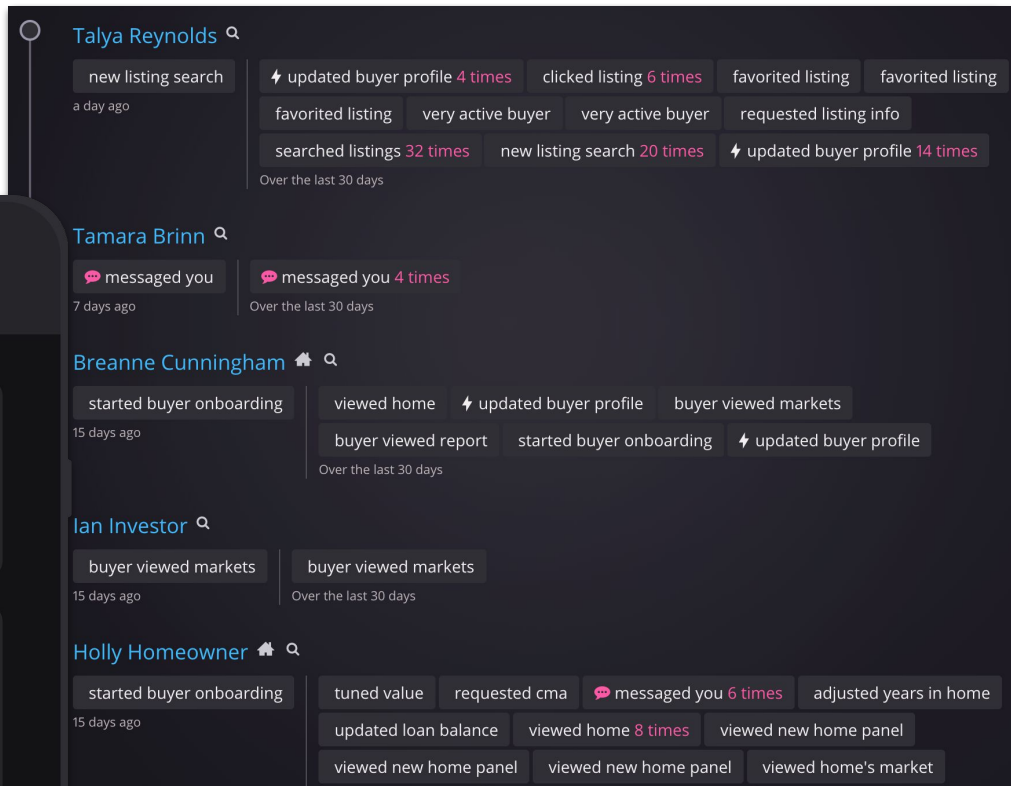
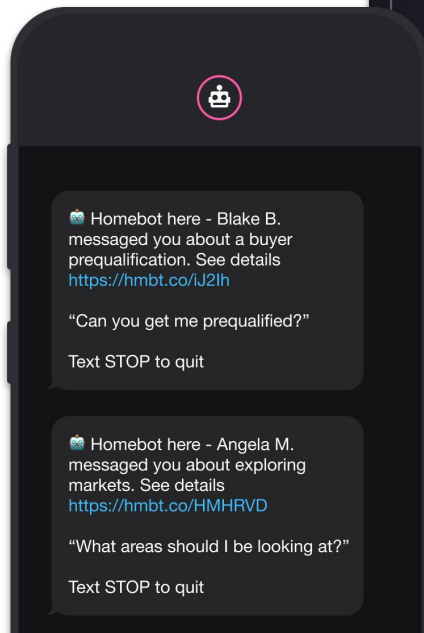
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Always be the first to know

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



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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](#)[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

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!

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 ⓘ

who own a property

TO UPLOAD, WE NEED

- ✓ Property Address
- ✓ Loan Information
- ✓ NMLS ID

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

Choose file
or drag and drop here

Your file in a spreadsheet format (.csv, .xls, .xlsx, .xlsm). No PDFs or images, please

Explore markets

Your price point: \$380,000 [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


PART 1

Creating Clients for Life

1. Turning Homeowners into Buyers

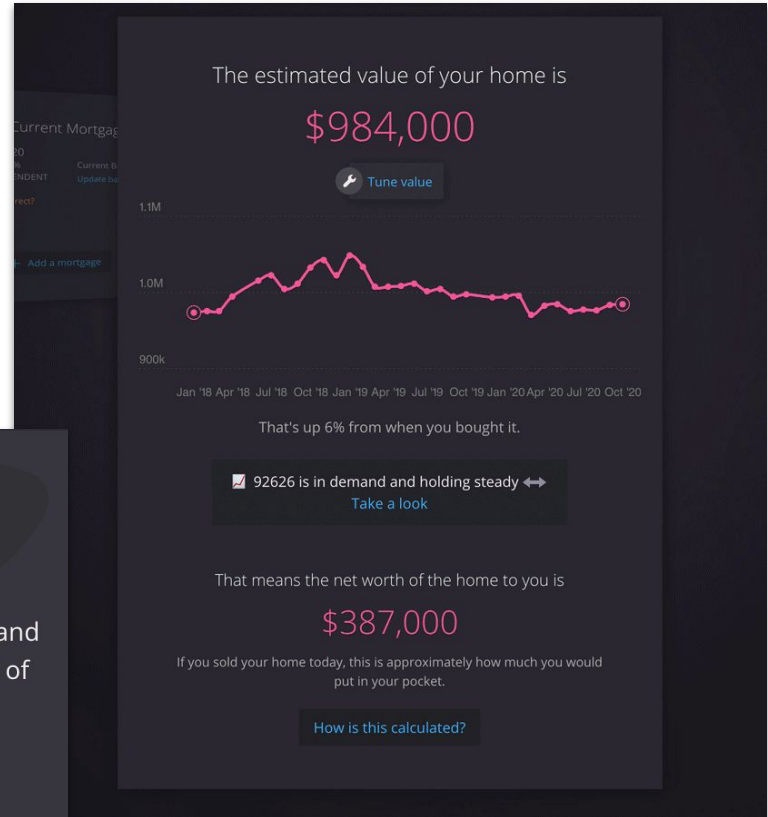
From Homebot's Home Value Report, homeowners can view the selling temperature of their home and compare it to other homes in their area:

- 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](#)



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?"

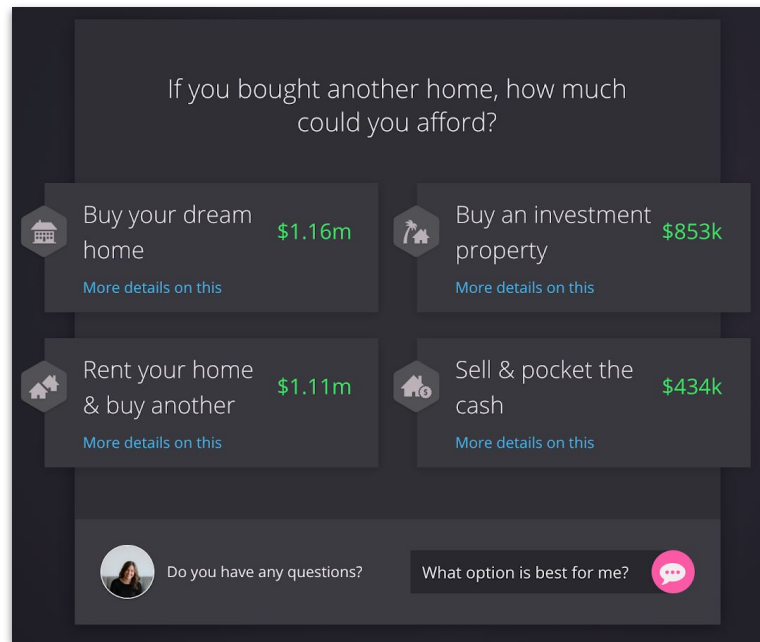
[View client in Homebot](#)

Turning Homeowners into Buyers cont'd

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

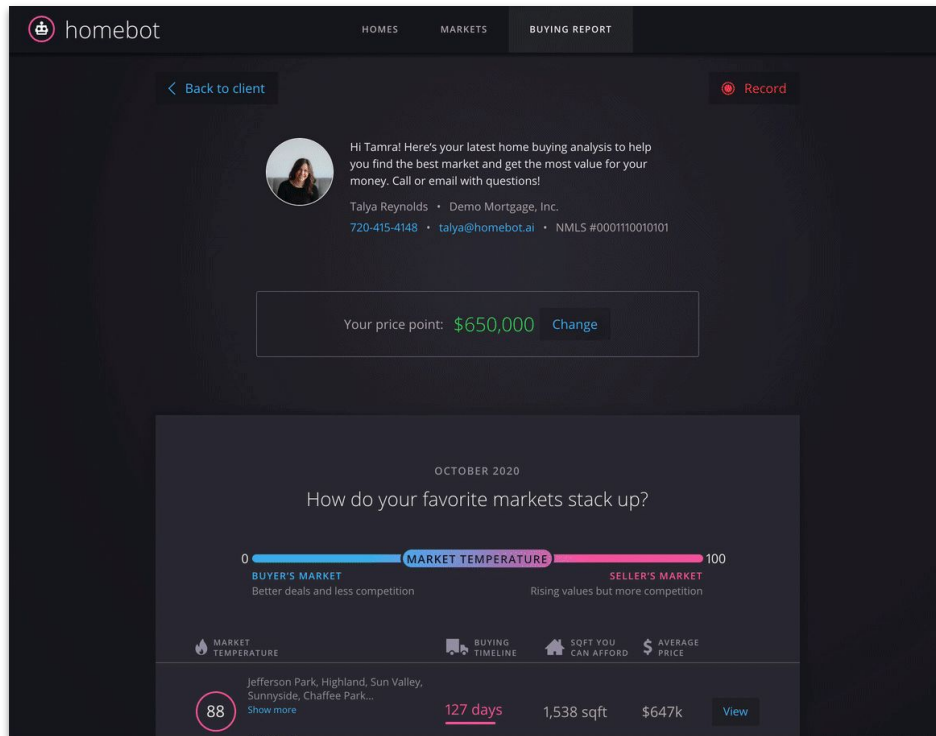
By uploading your prospects to Homebot:

- 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.



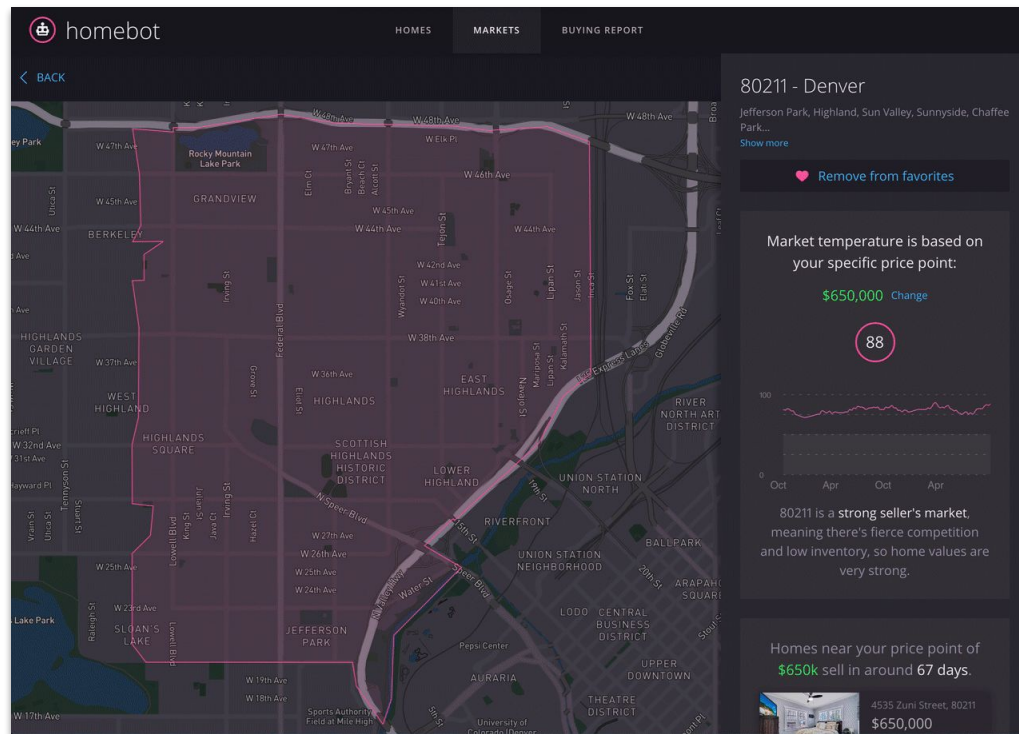
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3. Stand out from competitors

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

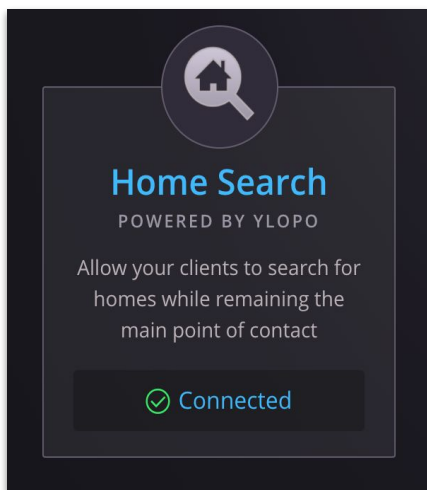


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4. Power Up with Home Search

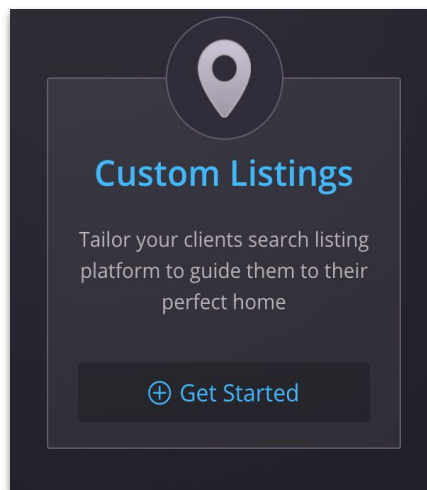
LENDERS

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.

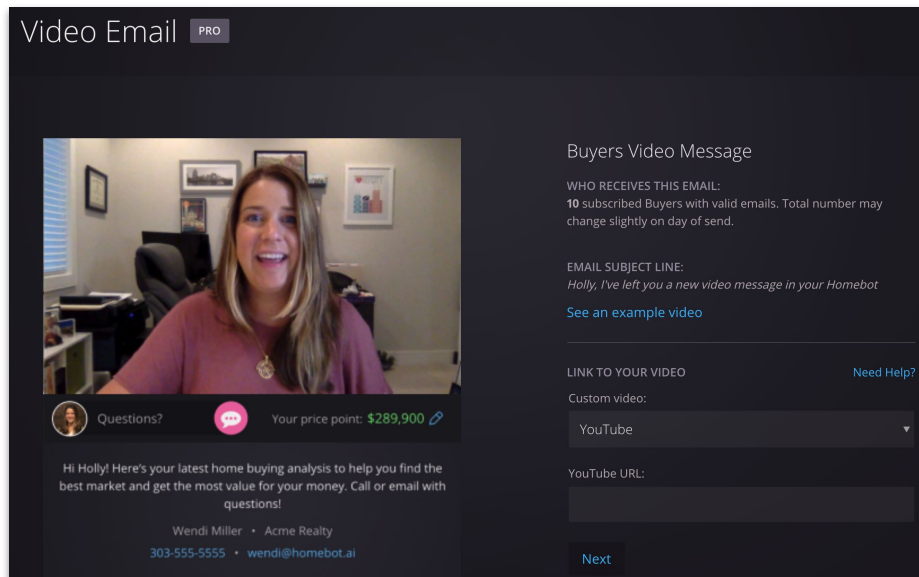
The screenshot displays the 'Home Search' interface, powered by YLOPO, within the homebot application. The top navigation bar includes 'Clients', 'Agents', 'Share', 'Customize' (highlighted with a red 'NEW' badge), and 'Account'. The main header shows a back arrow, a magnifying glass icon, and the text '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 Superior, Louisiana area. A sidebar on the right provides a 'BUYING REPORT' for '80027', noting it has a 'seller's advantage' and that home values are growing steadily. Below the map, a section titled 'Homes near your price point of \$550k sell in around 52 days.' lists three properties: 1471 Lantier Ln, \$640,000; 1461 Lantier Ln, \$579,000; and 1507 Snap Dragon Ct, \$575,000. 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 'Added Mar 20, 2020' and a 'Disconnect' button. Below this is a 'View in Market Explorer' button. The 'KEY FEATURES' section includes icons and descriptions for guiding clients through the buying process, receiving notifications for showings, and seeing client search activity.

5. Engage clients through Video

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!



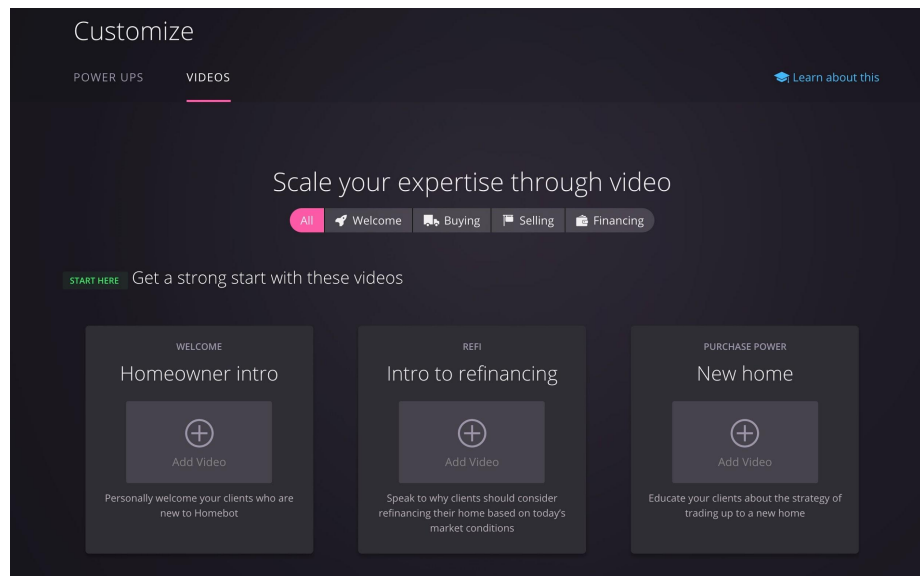
Video Manager

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

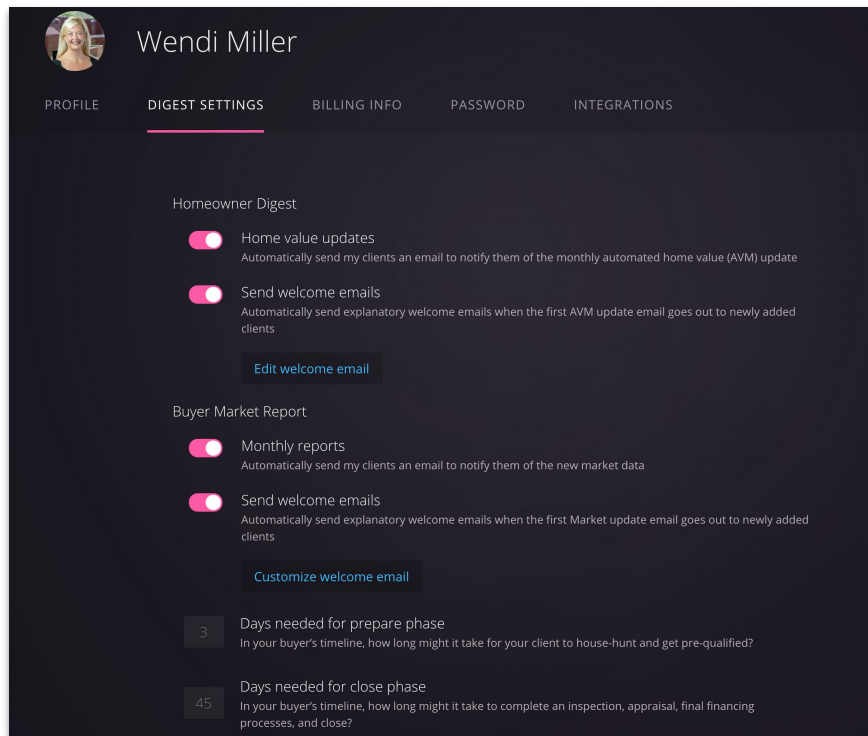
1. Easily scale your expertise
2. Set it & forget it
3. Position yourself as the expert
4. Weave your brand throughout the Homebot report

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!"



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



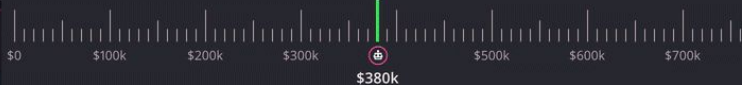
Search for a city...



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



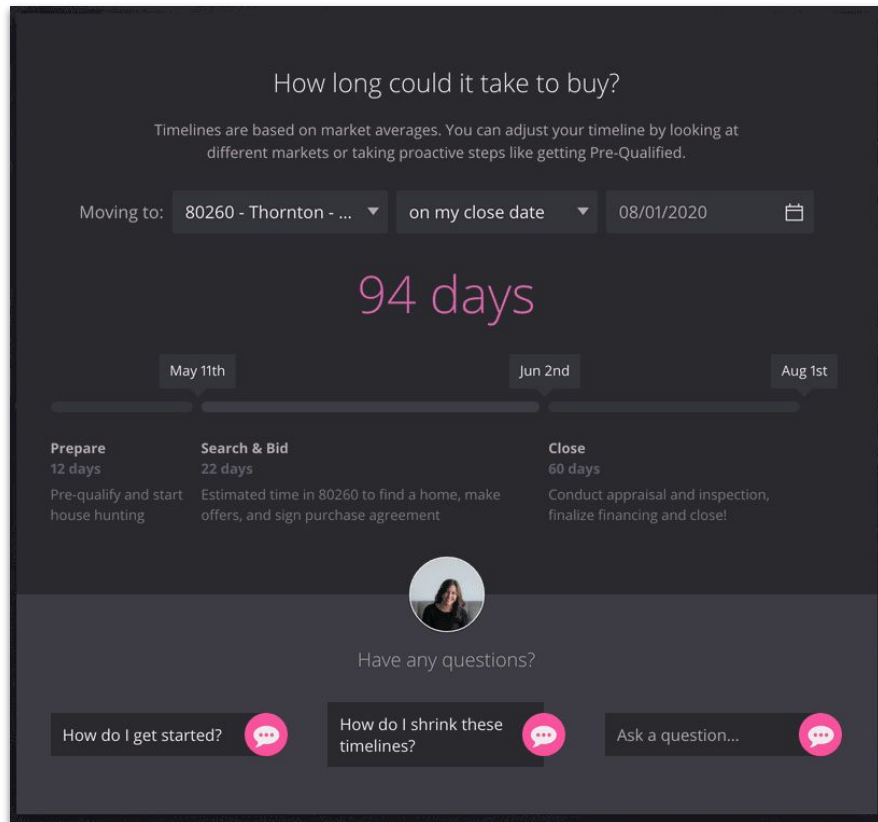
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From database, to “data-bank”

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”.



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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.



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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

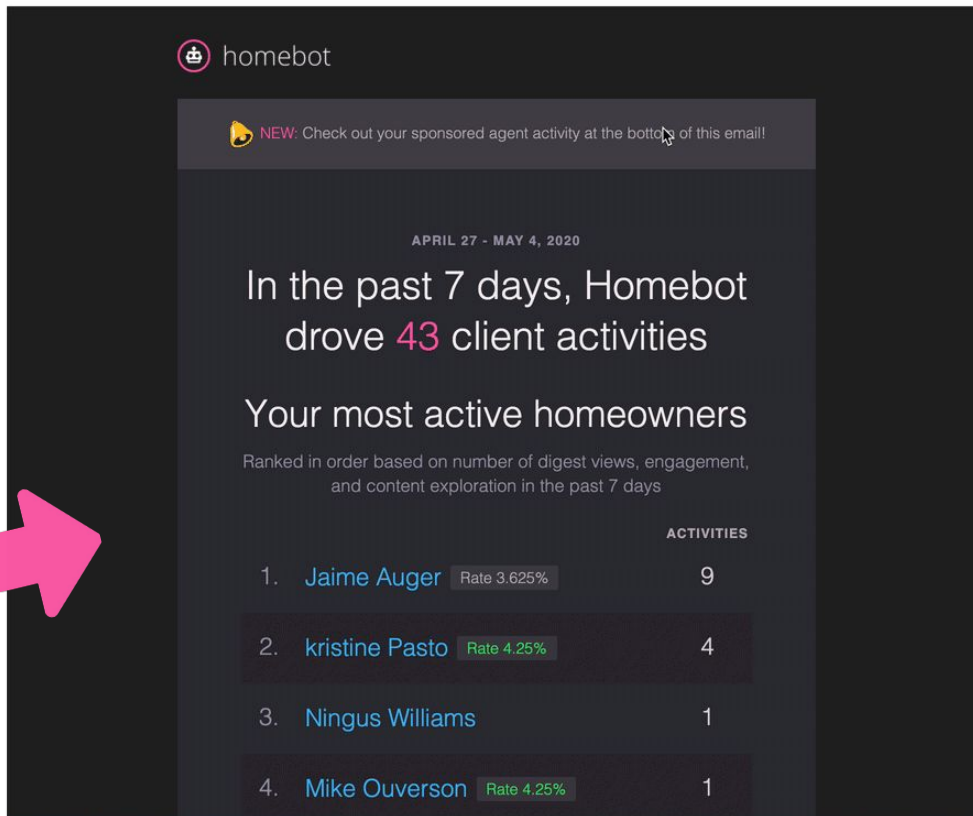
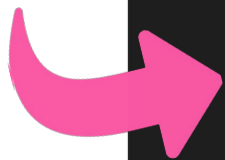
○ Ian Investor 🔍

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**



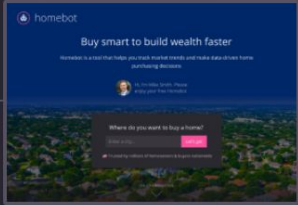
PART 3

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 search](#)

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



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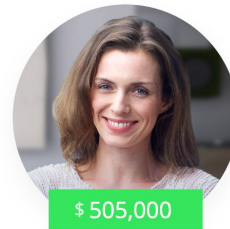
BONUS: Create & Strengthen Partnerships

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

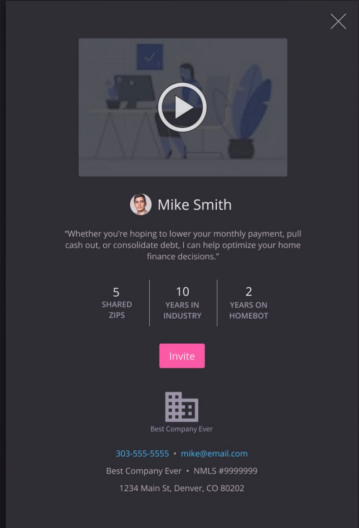
Customize your Co-Sponsorship Profile

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](#)







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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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