

## WORKSHOP

# Ultimate Guide to Prospecting

on Homebot

Learn how to...

- ✓ **LEVERAGE** YOUR ACTIVITY FEED
- ✓ **CREATE** WEEKLY CALL LISTS OF HOT LEADS
- ✓ **BUILD** A REFERRAL NETWORK
- ✓ **GO PRO** WITH HOMEBOT CUSTOMIZATIONS

**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](mailto:customersuccess@homebot.ai), and they will assist you accordingly.



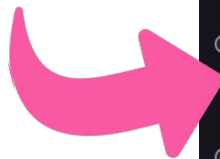
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# TIP 1 Leverage your Activity Feed

Your Activity Feed is the ultimate call list for the week

1. Build a strategy around your Activity Feed
2. Good content = good conversations
3. More conversations = more transactions

Let's check out some [live examples](#)



The screenshot displays the 'Activity feed' interface with the following details:

- Filters:** All (selected), Active Homeowners, Active Buyers, Hide clients that only have views.
- Pat Casey (3 hours ago):** clicked listing, viewed home, viewed home, viewed home, viewed home's market, clicked listing, clicked listing, first time on listing search, searched listings, searched listings, new listing search, new listing search. Over the last 30 days.
- Mike Brown (19 hours ago):** buyer viewed report, added home, viewed home 7 times, updated buyer profile, updated buyer profile, updated buyer profile, buyer viewed markets, buyer viewed markets, buyer viewed report, buyer viewed report, started buyer onboarding, updated buyer profile. Over the last 30 days.
- Jim Schmidt (21 hours ago):** viewed home's market, viewed home 5 times, viewed new home panel, viewed home's market, viewed home's market, updated buyer profile, buyer viewed markets, buyer viewed markets, buyer viewed report, buyer viewed report. Over the last 30 days.
- Kasey Griese (a day ago):** viewed home, viewed home. Over the last 30 days.
- Lauren Beam:** (Activity items partially visible).

In the bottom right corner, there is a pink chat bubble icon with a red notification badge containing the number '3'.

# TIP 2 Use rate filters to create a call list

The next best place to create a call list is under your **Homeowners** tab:

- Sort by rate
- Rank your past clients' equity from high-to-low
- Click on a client's profile to check their eligibility & activity

**LENDER PRO TIP:** Send them a personalized BombBomb about potential refi savings!

## Your homeowners

All 368

Needs CMA 36

Shared Clients

🔍 Search name or address... ✕

CLIENT ▲	VALUE ⇅	EST. EQUITY ⇅	EST. BALANCE ⇅	RATE ⇅
Adams, Brian 6008 Lee St NE <span>✓ Sent 12/10</span>	\$234,000	\$136k • 58.3%	\$98k	3.25%
Affolter, Trey 7208 66th Ave W <span>✓ Sent 1/1</span>	\$615,000	\$359k • 58.4%	\$256k	3.5% Estimated
Agbayani, Kris 1512 Monterey St <span>✓ Sent 12/16</span>	\$316,000	-\$3.4k • -1.1%	\$319k	3.85%

# TIP 3 Use equity filters to create a call list

When rates are low, proactively encourage clients to *unlock their equity*.

- Create a list of clients to trade up, buy investment properties, upsize or downsize.

From your **Homeowners** tab:

- Sort by equity rate
- Rank your past client's equity from high-to-low
- View their profile to dig in & gather information for your call

## Your homeowners

All (368)

Needs CMA (36)

Shared Clients

Search name or address... x

CLIENT	VALUE	EST. EQUITY	EST. BALANCE	RATE
LeBlanc, Sue 2 Rivercrest Ct Sent 12/11	\$335,000	\$296k • 88.3%	\$39k	8% Estimated
Rodriguez, Jorge 3022 Blanchard Ln Sent 12/25	\$475,000	\$172k • 36.2%	\$303k	7.78%
Gray, Tony 6212 Wagner Ln Sent 1/5	\$787,000	\$741k • 94.1%	\$46k	7.25% Estimated
Jones, Judy 4078 Bittersweet Dr NE	\$405,000	\$63.5k • 15.7%	\$342k	6.875% Estimated

# 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.



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](#)

# TIP 4 Generate business with Buyers


From the **Buyers tab**, look for signs of intention!


- Focus on the move date field
- Review their activity & buyers profile
- Each action they take is a talking point



Jean Johnson 

Buyer profile

 Preview Report

 Send Report

- \$ Price point: **560K**
- ★ Buyer type: Purchase first home
- 📅 Move date: Feb 01, 2021
- ✅ Viewed 10/16
- 📅 Next report: 11/15 - 11/25
- ♥ Favorite markets: 80237, 80014

Pre-Quals [Add Pre-Qual](#)

\$ You haven't added any Pre-Quals yet

Activity Feed

- Jean changed their price point to \$560,000.  
a few seconds ago
- Jean added 80014 to their favorite markets  
a minute ago
- Jean viewed the buyer report  
2 minutes ago
- Jean added 80237 to their favorite markets  
2 minutes ago
- Jean viewed the markets tab  
14 minutes ago



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# TIP 5 Use Homebot to grow partnerships

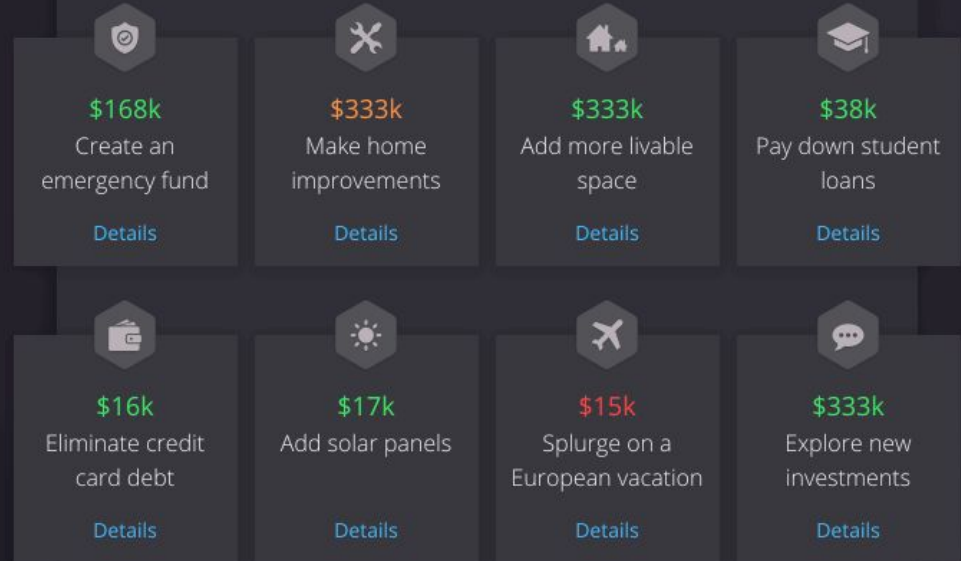
Go beyond the call of duty for your clients while generating new referrals.

Review your contacts for:

- Financial advisors (CPAs & CFPs)
- BNI groups
- Debt specialists
- Contractors & green energy companies

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

Your house has built **\$488k** worth of equity.  
How could you use it?



# How to create clients & partners for life

Clients can call and message you at the click of a button - providing endless opportunities to have a conversation:

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.
4. Connect them with the right resource & create a referral network.



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A screenshot of a homebot interface. At the top, there's a navigation bar with a profile picture and the text "Questions?", a pink chat bubble icon, and "Your price point: \$650,000" with a pencil icon. The main content area has a title "How long could it take to buy?" followed by a subtext: "Timelines are based on market averages. You can adjust your timeline by looking at different markets or taking proactive steps like getting Pre-Qualified." Below this is a form with "Moving to:" followed by a dropdown menu showing "80211 - Denver - Aur...", another dropdown menu showing "when my lease is up", and a date field showing "11/01/2021" with a calendar icon. The central part of the screen displays "127 days" in large pink text. Below this is a horizontal timeline with three markers: "Jul 9th", "Sep 2nd", and "Nov 1st". Underneath the timeline are three columns representing different stages: "Prepare" (12 days, "Pre-qualify and start house hunting"), "Search &amp; Bid" (55 days, "Estimated time in 80211 to find a home, make offers, and sign purchase agreement"), and "Close" (60 days, "Conduct appraisal and inspection, finalize financing and close!"). At the bottom, there's a profile picture and the text "Have any questions?". Below that are three buttons: "How do I get started?", "How do I shrink these timelines?", and "Ask a question...", each with a pink chat bubble icon.



# Example: 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.




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](#)

# #1 The Mortgage Coach Approach

Jumpstart the refi process & save yourself some time by creating a TCA for your client through Homebot!:

1. Filter by rates to find client's that are likely eligible
2. Use a Homebot refi scenario to generate a TCA from your client's digest
3. Follow up with TCA from Mortgage coach and call your client!

Let's see an example - [live.](#)

**GOOD EVENING, TALYA!**

Badges News Videos (6 New)

Clients NEW CLIENT SEARCH ALL

Recent Clients Recent Views **Automated 36** Strategy Templates

Source	First Name	Last Name	Presentation	Email	Date Created
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	1/7/2021 2:35:09 PM
	Jerry	Simonson	Refi for Primary Residence	jsimonson@loandepot.com	1/5/2021 8:08:18 PM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	12/22/2020 10:15:13 AM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	12/15/2020 9:17:19 AM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	12/2/2020 3:21:56 PM
	nina	hein	Refi for Primary Residence	nina+test@homebot.ai	12/1/2020 2:15:17 PM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	11/23/2020 12:48:58 PM
	Sue	LeBlanc	Refi for Primary Residence	sue.leblanc@benchmark.us	11/16/2020 12:59:18 PM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	11/9/2020 7:39:47 AM
	Holly	Homeowner	Refi for Primary Residence	nina+holly1@homebot.ai	11/3/2020 3:11:44 PM
	Jim	Schmidt	Refi for Primary Residence	jim.schmidt@raveis.com	10/21/2020 5:35:51 PM

#2

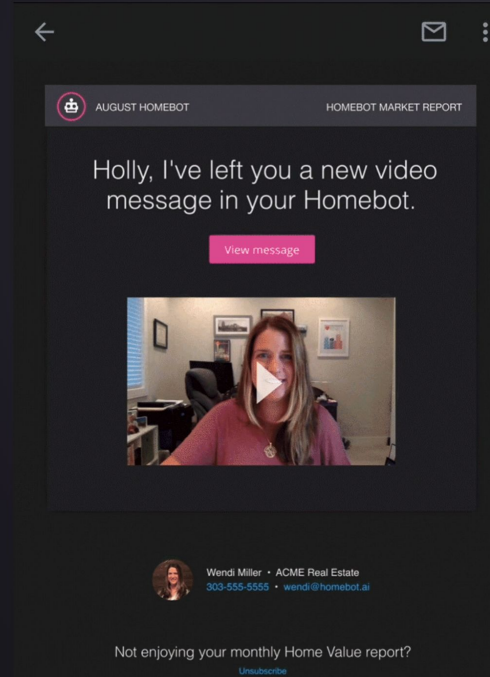
# Maximize engagement with Video Email

Plant seeds before you reach out by cultivating their 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



## 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

 <b>Homeowners</b> Send to all your clients who own a home <a href="#">Get Started</a>	 <b>Buyers</b> Send to all your clients who have a buyer profile <a href="#">Get Started</a>
 <b>Ripe for Refi</b> Send to all your clients with homes possibly eligible for a refi <a href="#">Get Started</a>	

# BONUS: 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

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](#)

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

[Invite](#)

Best Company Ever

303-555-5555 • [mike@email.com](mailto:mike@email.com)  
Best Company Ever • NMLS #9999999  
1234 Main St, Denver, CO 80202

# 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**

< BACK

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 #9999999  
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

# Three steps you can take right now:

1. Go into your activity feed & start making calls!
2. Sort your homeowner's for a cherry picker list of highest rates
3. If you're using **Lender Pro**, send your first video email!



# 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 started.



## Best Practices

Ready to make the most of Homebot? Discover our best practices for success.



## Mastermind Circle

Stay on top of email issues and managing your account with our Mastermind Circle.



## 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!



# 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:** 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](mailto:customersuccess@homebot.ai) and they will assist you accordingly.



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