

WORKSHOP

Landing Agent Partners

Learn how to...

- ✓ **APPROACH** AGENTS FOR PARTNERSHIP
- ✓ **PITCH & LAND** AGENT PARTNERS
- ✓ **SET UP** AGENTS ON HOMEBOT

Consumer



Loan Officer

Real Estate Agent



homebot



homebot

Build Wealth

Connect with agents

Building relationships with agents before partnering with them on Homebot is key - but where do you meet agents and make those connections to start building relationships?

- Attend agent networking groups
 - Attend an agent's caravan or "Broker's Open" where they pitch their listings
 - Visit their open houses
- *Pro tip: Show agents how to grow their database using Homebot's personalized lead capture page at their open houses



Build a rapport

Once you've connected with an agent, establish a rapport by asking questions that show you're committed to their success. This can help you create trust and build a mutually beneficial relationship.

- Get them to talk about themselves (their success, their pain points):
 - ◆ How are you doing this season?
 - ◆ What's working?
 - ◆ How are you staying top-of-mind?
 - ◆ How are you engaging clients? How are the results?
- Have them interact with the product in some way, like signing them up to receive Homebot
- Follow up with a personal "time-consuming" touch like, a text message or postcard



PART 1

Get the Meeting

Scripting: Show them the value



Hi [Agent Name], This is Grant Horvath at 1 EG Mortgage. I've been sending this new tool, Homebot, to all of my clients to help them track the value of their home and demonstrate ways they can build wealth with their equity. I hold your opinion in high regard and was wondering if I could set up your personal property on Homebot?



Scripting: Agent appreciation

“

Hi [Agent Name], This is Grant Horvath at 1 EG Mortgage. I've been using this new system, Homebot, for a few months now and it is generating a lot of listing leads and clients asking for CMA requests. I'm looking for trustworthy agents and know you have a great reputation. Would you mind if I started passing you some of my listing leads?

”



Scripting: Give back to the agent

“

Hi [Agent Name], This is Grant Horvath at 1 EG Mortgage. I've been using this tool Homebot that is consistently engaging my clients and generating a lot of repeat business with my sellers and buyers. Do you have some time next week to call down this list with me and engage my interested sellers?

”



PART 2

Pitch the Agent

Now that you've got the meeting, you're ready to pitch! Start by opening up a sample Homebot digest.

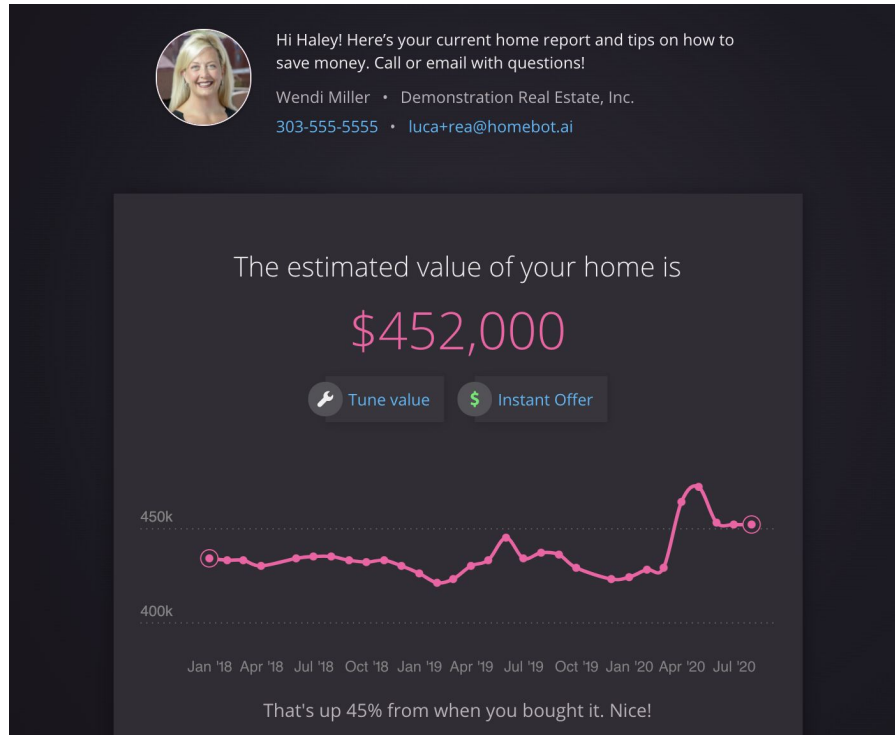
**Pro Tip:* Use a sample home with at least 20% equity and an above average interest rate to demonstrate the full capabilities.

5 reasons real estate agents *need* Homebot

1. Homebot prevents agents from “getting Zillow’d”
2. Homebot is a listings machine for agents
3. Homebot positions agents as the go-to real estate expert for their clients and prospects
4. Homebot is easy to use - they can simply set it and forget it
5. Homebot streamlines the prospecting process



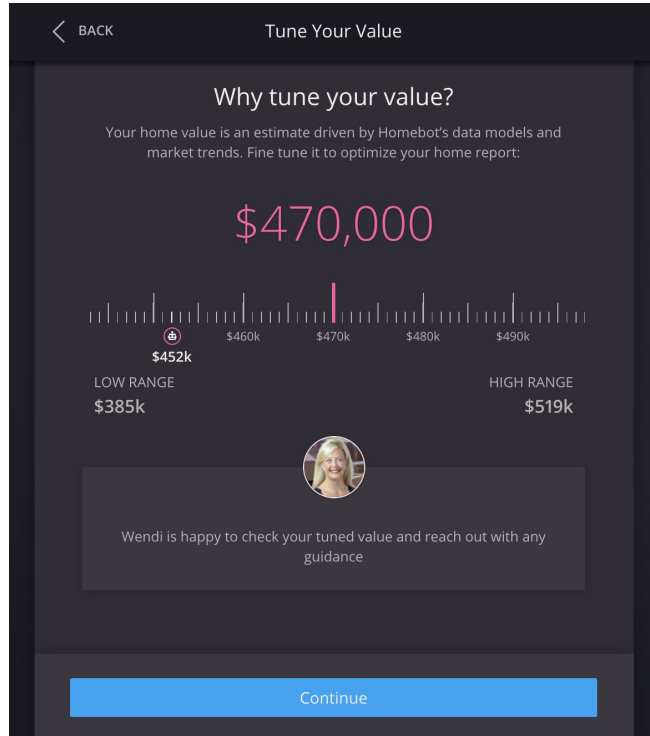
1. Don't get Zillow'd



- Homebot's Automated Valuation Model (AVM) uses advanced, industry-leading data and analytics to estimate the value of a client's home.
- With Homebot, clients can track the value of their home while sending any questions straight to the agent, rather than using Zillow where they are sold off as a lead to another agent.



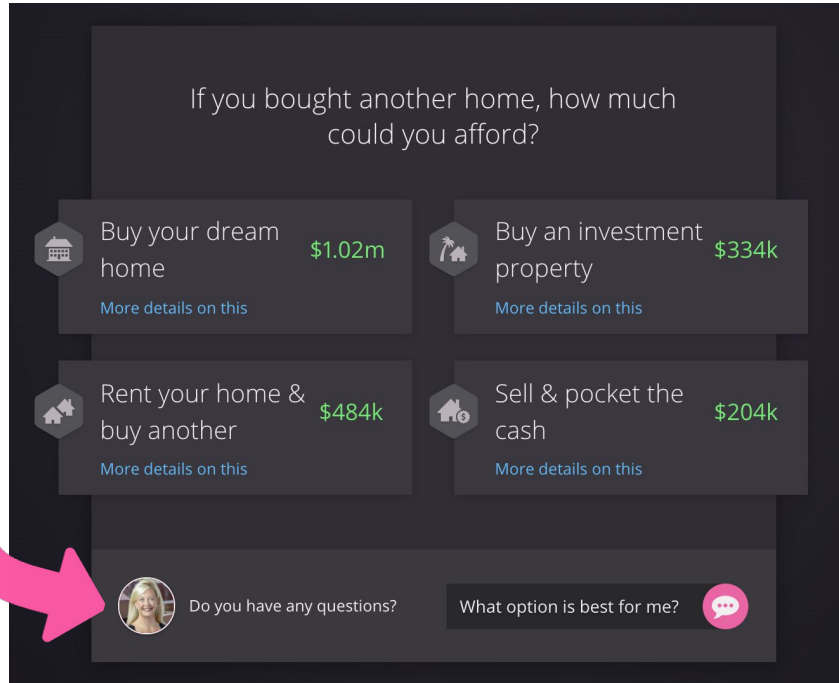
2. A listings machine



- Show the agent Homebot's Tune Your Value feature, which clients can use to challenge the estimated value of their home, provide key details about the home such as remodels, and get an expert opinion from the agent.
- Tuning their value automatically sends a comparative market analysis (CMA) request to the agent.
- Note that this can help the agent ensure they're the first to know when their client might be thinking about selling.

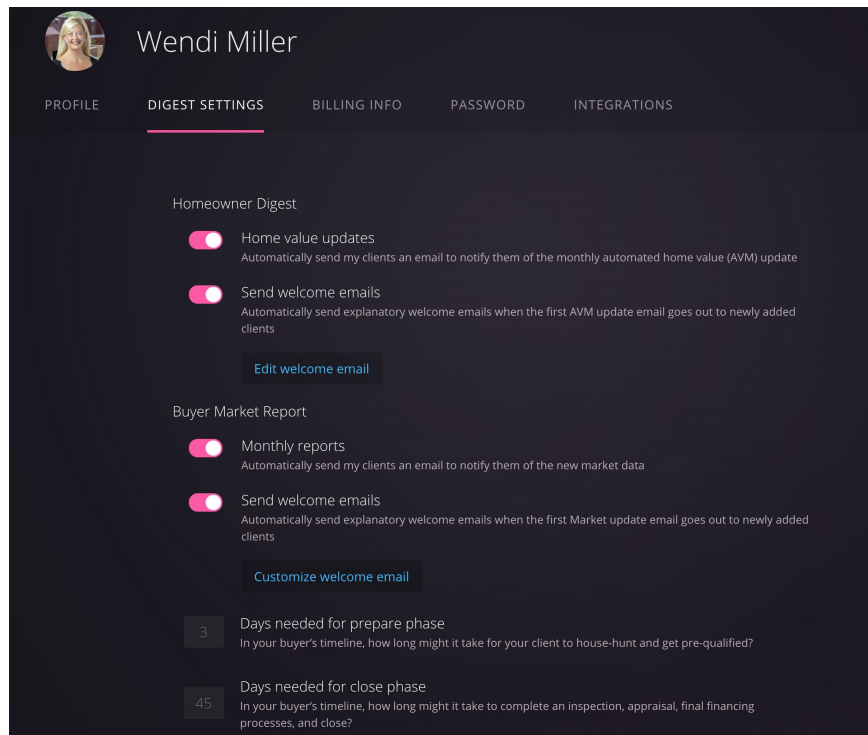


3. The go-to real estate expert



- Next, show them the Investment Property and Trade Up Module, which may spark their clients' interest and keeps them in the know about potential moves.
- Point out their branding and note that the call-to-action sends them a notification (not just here, but for all real estate-related content).
- Remind the agent that each interaction positions them as a consultant and expert, not a salesperson.

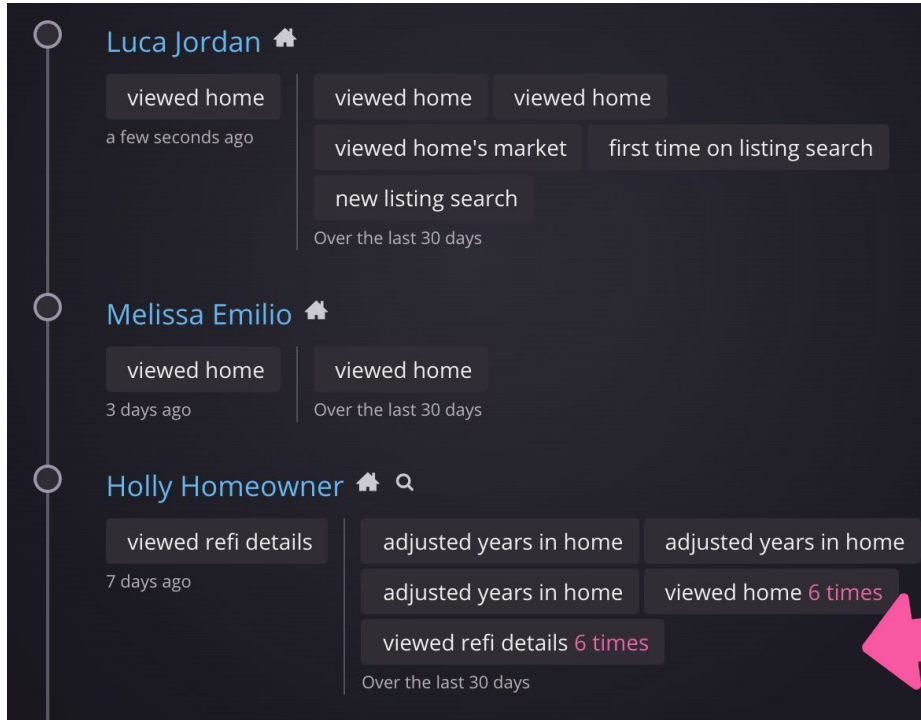
4. Set it and forget it



The screenshot shows the Homebot user interface for Wendi Miller. The profile name is at the top left, followed by navigation tabs: PROFILE, DIGEST SETTINGS (highlighted), BILLING INFO, PASSWORD, and INTEGRATIONS. Under 'Homeowner Digest', there are two toggle switches, both turned on. The first is 'Home value updates' with a subtext 'Automatically send my clients an email to notify them of the monthly automated home value (AVM) update'. The second is 'Send welcome emails' with a subtext 'Automatically send explanatory welcome emails when the first AVM update email goes out to newly added clients'. Below this is a button 'Edit welcome email'. Under 'Buyer Market Report', there are also two toggle switches, both turned on. The first is 'Monthly reports' with a subtext 'Automatically send my clients an email to notify them of the new market data'. The second is 'Send welcome emails' with a subtext 'Automatically send explanatory welcome emails when the first Market update email goes out to newly added clients'. Below this is a button 'Customize welcome email'. At the bottom, there are two input fields: 'Days needed for prepare phase' with a value of '3' and a subtext 'In your buyer's timeline, how long might it take for your client to house-hunt and get pre-qualified?'; and 'Days needed for close phase' with a value of '45' and a subtext 'In your buyer's timeline, how long might it take to complete an inspection, appraisal, final financing processes, and close?'.

- Working with an agent that says they're too busy? Remind them that Homebot runs on autopilot!
- Homebot will consistently send an email to your clients EVERY SINGLE MONTH.
- Loading data is easy, too. Just export the data in your CRM into Homebot's template. 10 minutes of work will yield a lifetime of value - for you and your clients.

5. Prospecting with Homebot



→ This is the PERFECT segway from “set it and forget it” because everyone knows that to be the best, you need to be prospecting.

→ Pull up the Activity Feed and demonstrate how it’s going to turn the agent’s database into a “databank” by helping them create call lists.

**Pro Tip:* Offer the agent the chance to look at your activity feed with you and pick up any leads they may be able to reach out to.

Bonus: Personalized lead capture page

Promote your Homebot signup page

Everyone who signs up will be added to your Homebot client list and you'll get an email with details.



Get homeowner leads

All signups will become clients and begin receiving monthly home digests

<https://hmbt.co/2g8hF7z>

copy



Get buyer leads

All signups who complete onboarding will begin receiving monthly buyer reports

<https://hmbt.co/3g8mF7t>

copy

- Agents don't need to pay for personalized landing pages when they're using Homebot!
- They'll get access to customized lead capture pages that funnel their leads into Homebot to be nurtured for life.
- Homebot's lead capture pages are great for open houses, neighborhood farming, social ads, and more!




PART 3

Send them an Invitation to Join you
on Homebot

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 *
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

- 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

How to make the most of Agent FREEMIUM

- Do you have a desk rental or advertising agreement with a brokerage? Use the roster of agents!
 - ◆ Toggle on Freemium & invite every agent on the list. Follow up with a call or email encouraging them to add a select few clients and get their feedback.
- Make it the call to action at lunch & learn presentations
 - ◆ Once you have the list of attendees for your event, send them an invite to Homebot at the time of the event. At the end of the event, walk them through creating their account and inviting their first Homebot pilot clients.
- Add your custom share link to your agent CRM campaigns
 - ◆ Create a personal video walking them through your report [\(see example\)](#) or [use Homebot's video explainer for agents](#).



Resources for pitching & selling agents



Download our [Agent Pitch Deck](#)



Download our [Homebot Explainer for Agents](#) one-pager



Download the [value-add scripts for recruiting agents](#)



Download our favorite [text scripts for landing agents](#)



Resources to share with your agent partner



Download & share [Homebot Resources for Agents](#) one-pager



Bonus #1: Give your agent customizable [Homebot postcards!](#)



Bonus #2: Give your agent customizable [Homebot door-hangers!](#)



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.



Homebot for Agents

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

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.