

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
- ✓ **LEVEL UP** WITH HOMEBOT CUSTOMIZATIONS

DISCLAIMER: Specific features like access to Buyers and Power Ups require lender sponsorship. For questions or support related to this, contact customersuccess@homebot.ai.



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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



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Activity feed

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

Pat Casey 🏠

clicked listing 3 hours ago

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 🏠 🔍

buyer viewed report 19 hours ago

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 🏠 🔍

viewed home's market 21 hours ago

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 markets buyer viewed report buyer viewed report


Over the last 30 days

Kasey Griese 🏠

viewed home a day ago

viewed home Over the last 30 days

Lauren Beam 🏠



TIP 2 Use 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 est. equity or interest rate
- Rank your past client's from high-to-low
- View their profile to dig in & gather information for your call



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Your homeowners

All 16

Needs CMA 3

Shared Clients

Search name or address... x

CLIENT ▾	VALUE ▾	EST. EQUITY ▲	EST. BALANCE ▾	RATE ▾
Angel, Angie 840 E Elm St Sent 3/8	\$320,000	\$143k • 44.6%	\$177k	3.25% Estimated
McGarvey, Lance 4138 E Wading Pond Dr Sent 3/16	\$292,000	\$144k • 49.2%	\$148k	5.625% Estimated
Stearns, Irene 8182 N Streamside Ave Sent 3/9	\$214,000	\$172k • 80.3%	\$42k	6.125%

TIP 3 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

DISCLAIMER: Buyers is only available for agents who are co-sponsored with a lender. For questions or support related to this, contact customersuccess@homebot.ai, and they will assist you accordingly.



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The screenshot displays the 'Buyer profile' for Jean Johnson. At the top right, the name 'Jean Johnson' is shown with an edit icon. Below this, there are two buttons: 'Preview Report' and 'Send Report'. The profile details include: Price point: 560K, Buyer type: Purchase first home, Move date: Feb 01, 2021, Viewed 10/16, Next report: 11/15 - 11/25, and Favorite markets: 80237, 80014. Under the 'Pre-Quals' section, there is an 'Add Pre-Qual' button and a message stating 'You haven't added any Pre-Quals yet'. The 'Activity Feed' section at the bottom lists five recent actions: 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), and Jean viewed the markets tab (14 minutes ago).

Jean Johnson

Buyer profile

\$ 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

\$ 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

TIP 4 Use Homebot to grow partnerships

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

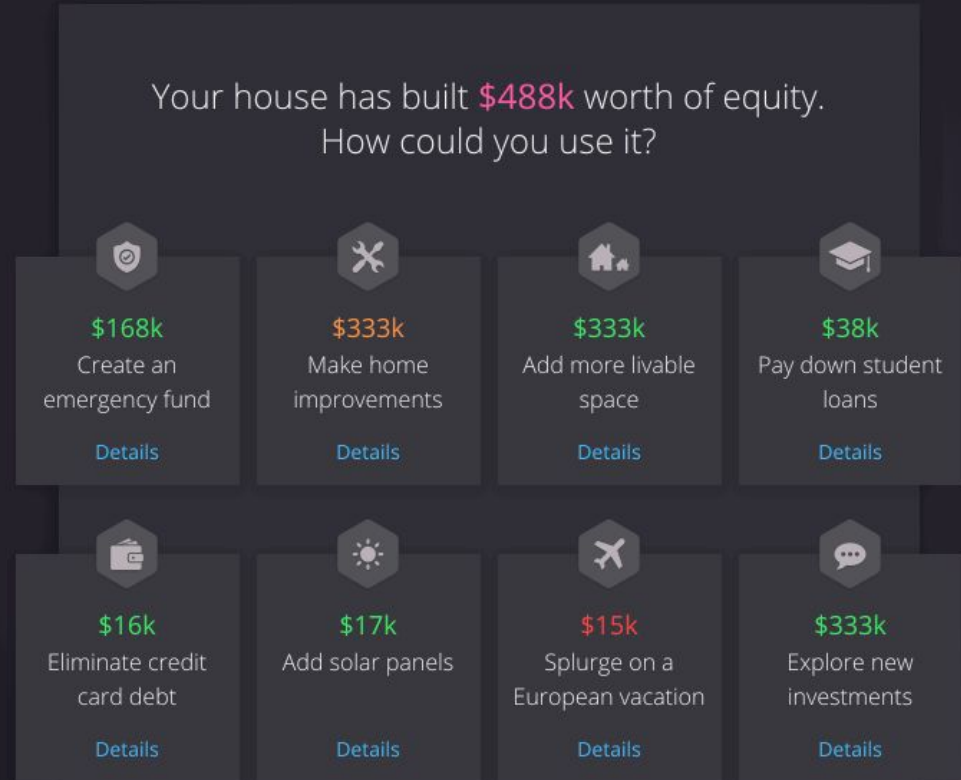
Review your contacts for:

- 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!



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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 home equity to their financial goals.
4. Connect them with the right resource & create a referral network.



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Sophie Joy wants to know more about **their Market:**

"How's my neighborhood doing?"

[View client in Homebot](#)

Get in touch with Sophie Joy to answer their question:

erica+sophie@homebot.ai

Or simply reply to this email.

Brenda Baker wants to know more about **Short Term Rentals:**

"im interested in learning more about keeping my home as a rental and buying another"

[View client in Homebot](#)

Get in touch with Brenda Baker to answer their question:

erica+brenda@homebot.ai

Eric Anderson wants to know more about **their Market:**

"Should I sell now?"

[View client in Homebot](#)

Get in touch with Eric Anderson to answer their question:

erica+eric@homebot.ai

Or simply reply to this email.

Financially-focused messages

Homeowners with a loan that is *at least five months old* will be able to explore potential refinancing scenarios, and can request more information.

This is a wonderful opportunity to:

- Message or call them back to touch base about their goals
- Refer a lender in your network **or** make sure your lender co-sponsor is privy to this information and available to respond.



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Holly Homeowner wants to know more about
Refinancing:

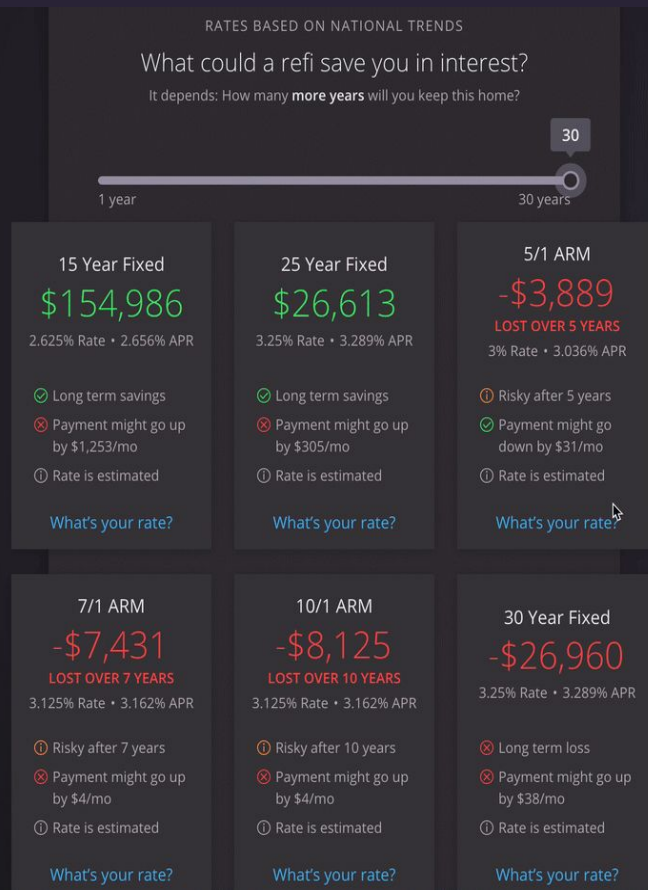
"What are my cashout options?"

[View client in Homebot](#)

Get in touch with Holly Homeowner to answer their question:

+1720-314-5463 | erica+holly@homebot.ai

Or simply reply to this email.



Maximize engagement with Video Email

Plant seeds before you reach out by cultivating their interest using **Video Email**:

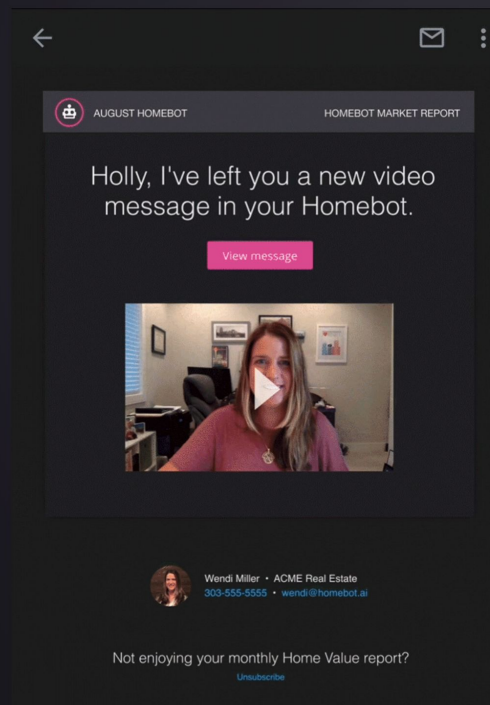
1. Introduce your clients to the report they'll be receiving
2. Call attention to relevant features to capture your client's interest
3. Show them how they can use various features to discover important information
4. Follow up monthly and keep clients up-to-date on market trends
5. Call down the list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

* Only available with lender co-spo



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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](#)

Four 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. Browse your buyer's to find leads for your active listings
4. If you're partnered with a lender, send your first video email!



Homebot Learning Center for Agents

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

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



Getting Started

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



Best Practices

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



Manage Clients

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



Lender Partnership



Integrations + Tools



Account & Billing



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Have additional questions?

For support with your account - CustomerSuccess@homebot.ai

For support landing a lender sponsor - Sales@homebot.ai

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