

## WORKSHOP

# Ultimate Guide to Prospecting

on Homebot



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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.

# TIP 1 Leverage your Activity Feed

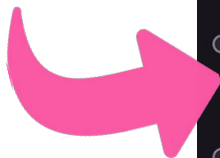
Your Activity Feed is the ultimate call list for the week

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](#)



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### Activity feed

**All** 🏠 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 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** 🏠



# Let's review



## Finding Leads

1. Go to your Activity Feed
2. Check 'Hide clients that only have views'
3. Select a name with high activity
4. Review their activity, then click to view their report



## Engaging Leads

1. From their report, do a screen share on Bombbomb or your preferred video service
2. Send the video email to your client with a clear call to action
3. **Follow up with a phone call**



## 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!



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### Your homeowners

All 368

Needs CMA 36

Shared Clients

Search name or address... x

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

Let's see an example - live.

# 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



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## 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

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


# 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

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



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

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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 5 Use Homebot to grow partnerships

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

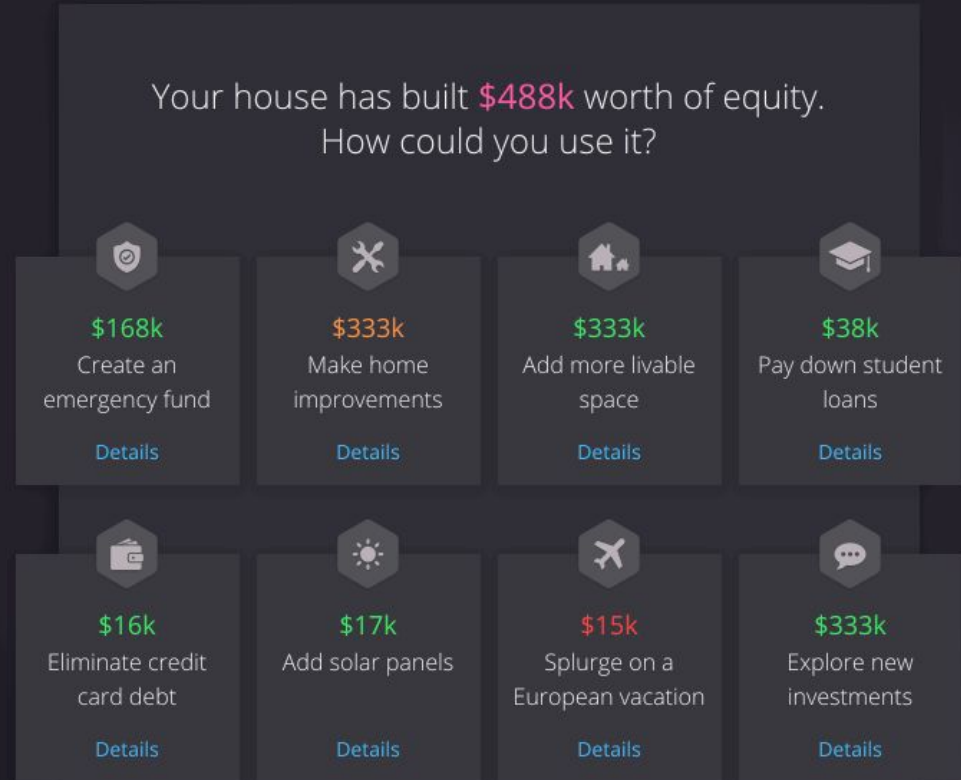
Review your contacts for:

- 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!



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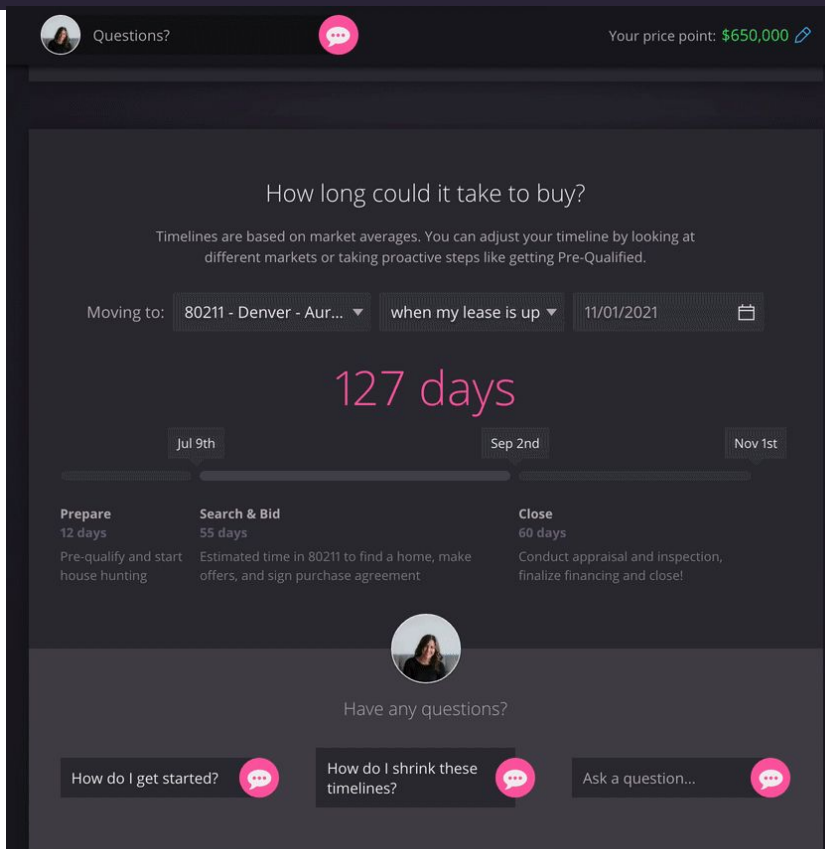
# How to create clients & partners for life

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



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# 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.



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The estimated value of your home is


**\$752,000**

 [Tune value](#)



Jan '18 Apr '18 Jul '18 Oct '18 Jan '19 Apr '19 Jul '19 Oct '19 Jan '20 Apr '20 Jul '20 Oct '20

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](#)

# Example: Equity Empowerment Opportunities


Homebot is a fantastic conversation starter that provides eligible clients with opportunities to leverage their equity to grow their wealth intelligently.

1. Call your client right away
2. Get an understanding of their financial goals
3. See if they'd like an introduction to a specialist you trust
4. Ask both of them to share Homebot with their friends and family!



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

 <b>\$168k</b> Create an emergency fund <a href="#">Details</a>	 <b>\$333k</b> Make home improvements <a href="#">Details</a>	 <b>\$333k</b> Add more livable space <a href="#">Details</a>	 <b>\$38k</b> Pay down student loans <a href="#">Details</a>
 <b>\$16k</b> Eliminate credit card debt <a href="#">Details</a>	 <b>\$17k</b> Add solar panels <a href="#">Details</a>	 <b>\$15k</b> Splurge on a European vacation <a href="#">Details</a>	 <b>\$333k</b> Explore new investments <a href="#">Details</a>

 Do you have any questions?  

#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.](#)



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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	

# Maximize engagement with Video Email

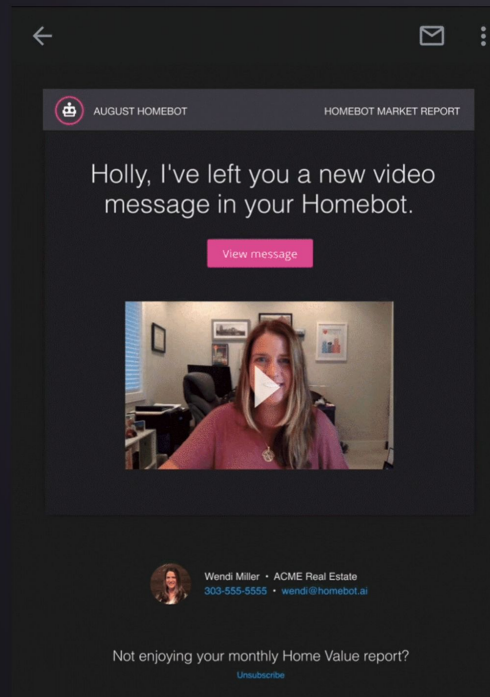
Plant seeds before you reach out by cultivating their interest using **Video Email**:

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



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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

 <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>	

# 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!



# Bonus: Take advantage of our referral program!



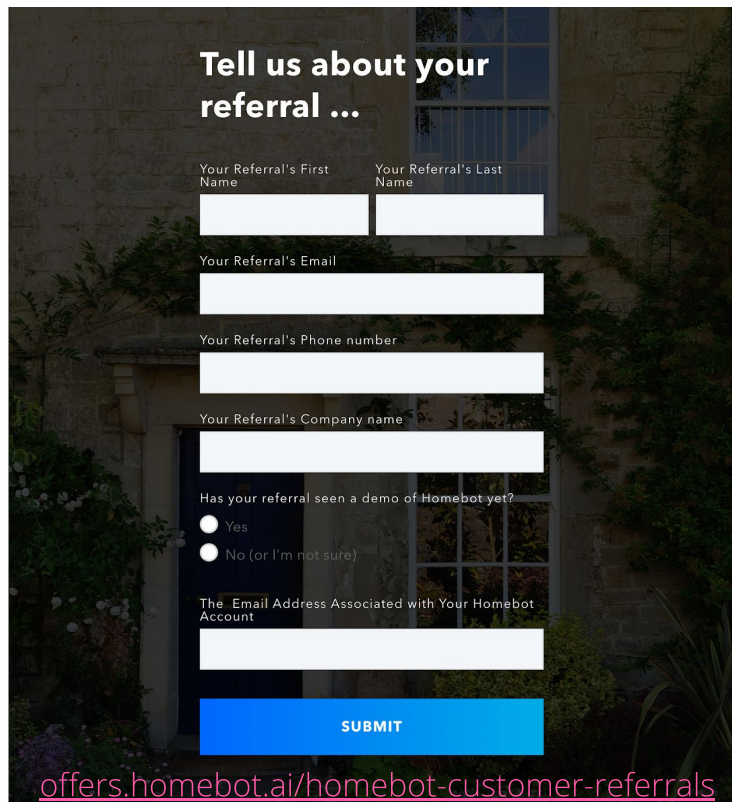
## Homebot's Loan Officer Referral Program

Do you have a friend, family member, or peer who would love Homebot? Refer new loan officers to Homebot! They will get \$100 off their signup fee, and you will receive \$100 per referral.\*

### How it works:

- **STEP 1:** Fill out the form to let us know who your referral is. The first step to getting them on board is to show them how it works, so let us know if they need a demo.
- **STEP 2:** Once they're ready to signup, we'll provide them with a \$100 discount code.
- **STEP 3:** We'll keep you updated on when they become a customer! As soon as they qualify, we'll send you a \$100 Amazon gift card.

*\*In order to qualify new customers must stay on Homebot for 90 days and load a minimum of 25 clients to their database.*

A screenshot of a referral form overlaid on a background image of a house. The form is titled "Tell us about your referral ..." and contains several input fields and a submit button. The background image shows a two-story house with a stone wall and a large window, surrounded by greenery.

**Tell us about your referral ...**

Your Referral's First Name

Your Referral's Last Name

Your Referral's Email

Your Referral's Phone number

Your Referral's Company name

Has your referral seen a demo of Homebot yet?

☐ Yes

☐ No (or I'm not sure)

The Email Address Associated with Your Homebot Account

**SUBMIT**

[offers.homebot.ai/homebot-customer-referrals](https://offers.homebot.ai/homebot-customer-referrals)

# 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?



## Mastermind

Stay on top of email issues and managing your client's account.



## Agent Sponsorship

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



## Integrations + Tools

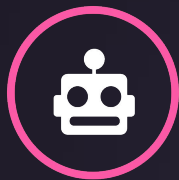
Power up your Homebot by integrating it with some of your favorite tools + discover new ones.



## 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?

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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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