



homebot

+



Castle & Cooke

MORTGAGE, LLC NMLS #1251

Landing agent partners with Homebot

The key to winning purchase business in 2022



homebot

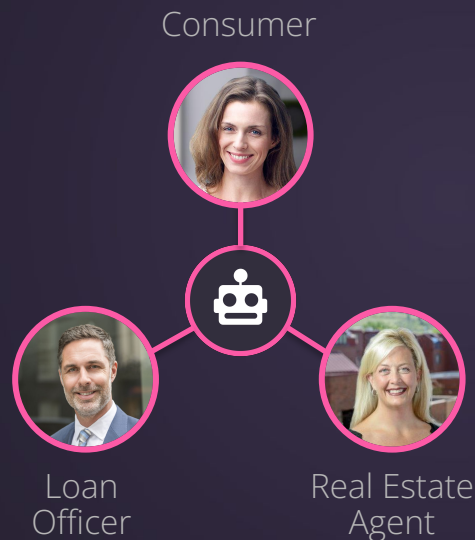
Today's Agenda

Training time: 30 minutes

- ✓ Why cosponsor?
- ✓ Landing & Inviting Agent
Partners to Homebot
- ✓ Co-sponsor Best Practices +
FAQs

Why Should You Co-sponsor?

Co-Sponsor Real Estate Agents



→ Get your brand in front of their network

→ Extend your reach

*Lenders who sponsor agents reach an average of 330 additional clients, resulting in an 86% monthly-reach increase and 50% more client conversations.

→ Strengthen your agent partnerships




homebot

Build Wealth




Real estate agent's brand

 Hi Holly! Here's your current home report and tips on how to save money. Call or email with questions!
Wendi Miller • Demonstration Real Estate, Inc.
303-555-5555 • luca+rea@homebot.ai

The estimated value of your home is

\$723,000

[Tune value](#) [Instant Offer](#)



80138 is heating up a bit
[More details](#)

That means the net worth of the home to you is

\$427,372

If you sold your home today, this is approximately how much you would put in your pocket.

[How is this calculated?](#)


WHAT'S IMPORTANT NOW

- Set up a safety net fund by cashing out around \$130k [>](#)
- You could refi to drop your payment by \$528/month [>](#)
- Thinking about selling? Downsize to pocket ~\$259k [>](#)

15 Year Fixed

\$114,019

2.75% Rate • 2.797% APR


 These are estimates based on national rate trends. Wendi recommends Michael Lender, a trusted lender, to get a quick customized rate check.

[Get my rate](#)

In the meantime, some things to keep in mind

Estimated savings over years:

\$114,019



Since the rate is fixed, your monthly principal and interest payment stay fixed

Your payment could increase by \$224/mo, but you'd likely see long-term savings

You might recoup closing costs by 2021, assuming average fees of \$5,000.

How much does refinancing cost?

Refinancing comes with fees, but you can sometimes roll refi fees and other costs into your loan instead of bringing cash to the closing.

Mortgage interest and costs depend on current market rates, your financial situation, home occupancy status, and refi goals.


[Disclaimers](#)

Want to learn more?

What are my cashout options? [🗨️](#)

How long until I recoup closing costs? [🗨️](#)

Ask a question... [🗨️](#)

 Michael Lender
720-432-1115
NMLS #5555555



LO's brand

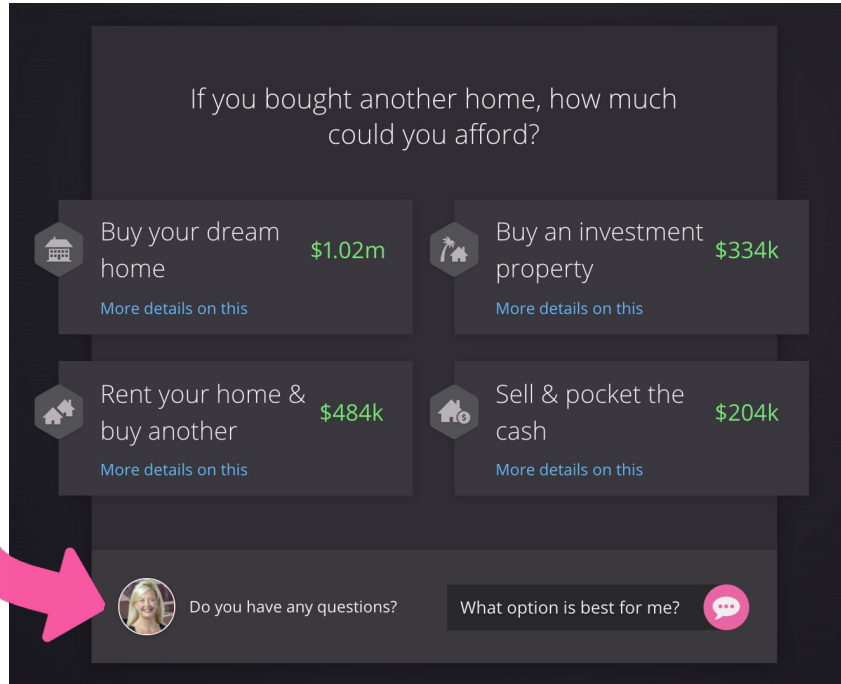


5 reasons real estate agents *need* Homebot

1. Positions agents as the go-to real estate expert
2. Monthly reports turn homeowners into buyers
3. Highlights homeowners selling potential - listing generator!
4. It's the best virtual assistant - agents can set it and forget it
5. Helps streamline the prospecting process



1. The go-to real estate expert



- Next, show them the Purchase Power 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.



2. Generate new listings

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](#)



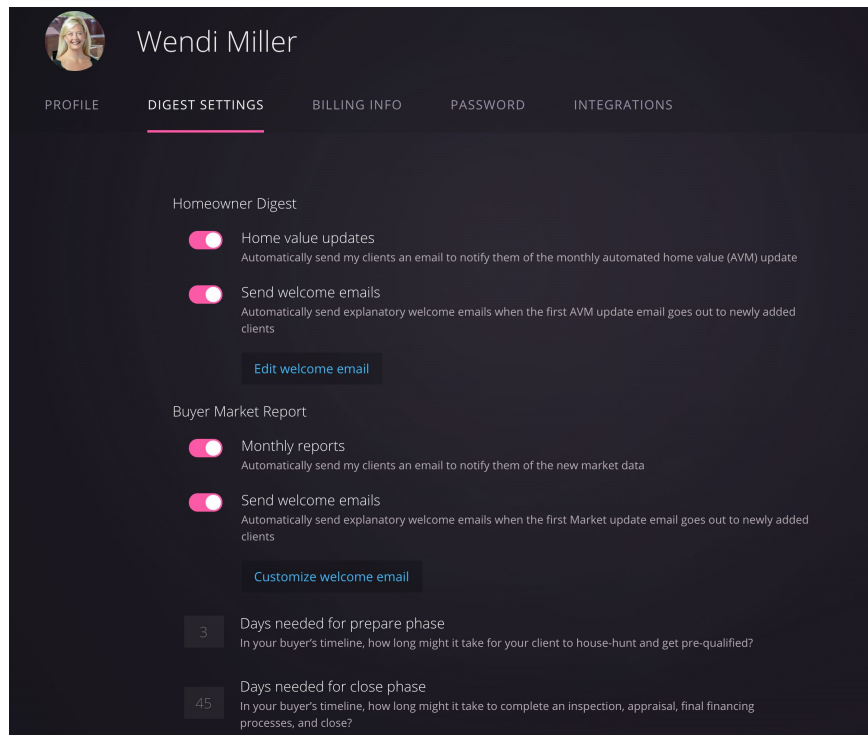
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3. Turn homeowners into buyers

The screenshot shows a dark-themed interface. At the top, a Homebot icon is followed by the text "So, what's next?". Below this are two buttons: "Start your search" and "Verify selling price". A large pink arrow points from the "Start your search" button to a modal dialog box. The dialog box has a close button (X) in the top right corner and contains the following text: "Do you want to activate the buyers experience for this client?". Below this, it states: "We'll set **85755** as their primary market and **\$655,500** as their price point, but you can update at any time. Once enabled, they will receive their first monthly market report within 24 hours." At the bottom of the dialog are two buttons: "Yes, activate" and "No, cancel". To the right of the dialog is a "Custom Listings" card with a location pin icon, the text "Custom Listings", and a "Get Started" button.

- Within the purchase module, clients can start a home search which will activate the buyers side of Homebot.
- Adding buyers into Homebot is only possible if the Agent has a lender co-sponsor.
- Their buyers search experience can be customized by connecting the Agents preferred listing website or custom IDX.

4. Set it and forget it

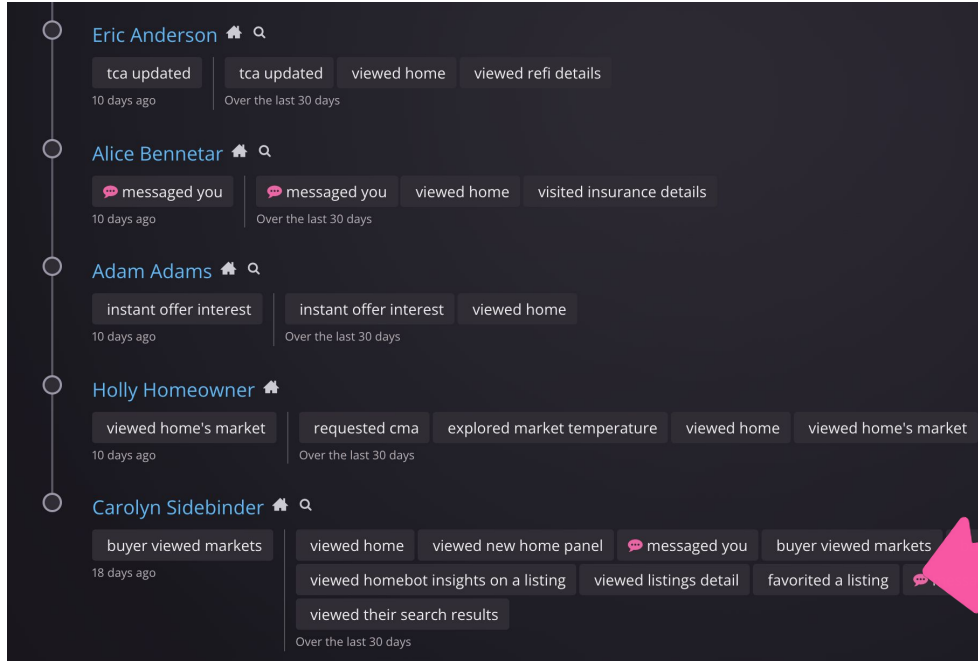


The screenshot shows the Homebot user interface for Wendi Miller. The user's name and profile picture are at the top left. Below the name are navigation tabs: PROFILE, DIGEST SETTINGS (which is highlighted with a red underline), BILLING INFO, PASSWORD, and INTEGRATIONS. The main content area is divided into two sections: Homeowner Digest and Buyer Market Report. Each section has two toggle switches for 'Home value updates' and 'Send welcome emails', both of which are turned on. Below the 'Send welcome emails' toggle in each section is a button to edit or customize the welcome email. At the bottom, there are two input fields for 'Days needed for prepare phase' (set to 3) and 'Days needed for close phase' (set to 45).

- 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!



A decorative purple arc with several small white dots is positioned behind the text.

Send them an Invitation to Join you
on Homebot

Pro vs Freemium

Pro:

- \$25/month + \$50 set up fee
- 500 client capacity
 - ◆ Agents can purchase additional buckets of 500 clients for another \$10/month
- Ability to upload clients in bulk
- Full access to Homebot


Freemium:

- \$0/month + \$50 set up fee
- 25 client capacity
- Bulk file uploader turned off
- Full access to 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.

<https://admin.homebotapp.com/agents/invite>

FREEMIUM Plan for Agents

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

<https://admin.homebotapp.com/agents/invite>

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 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 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 our network!



Agent Invite Templates

Jump start your agent invite process by using our agent email invite templates.



Homebot for Agents

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

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

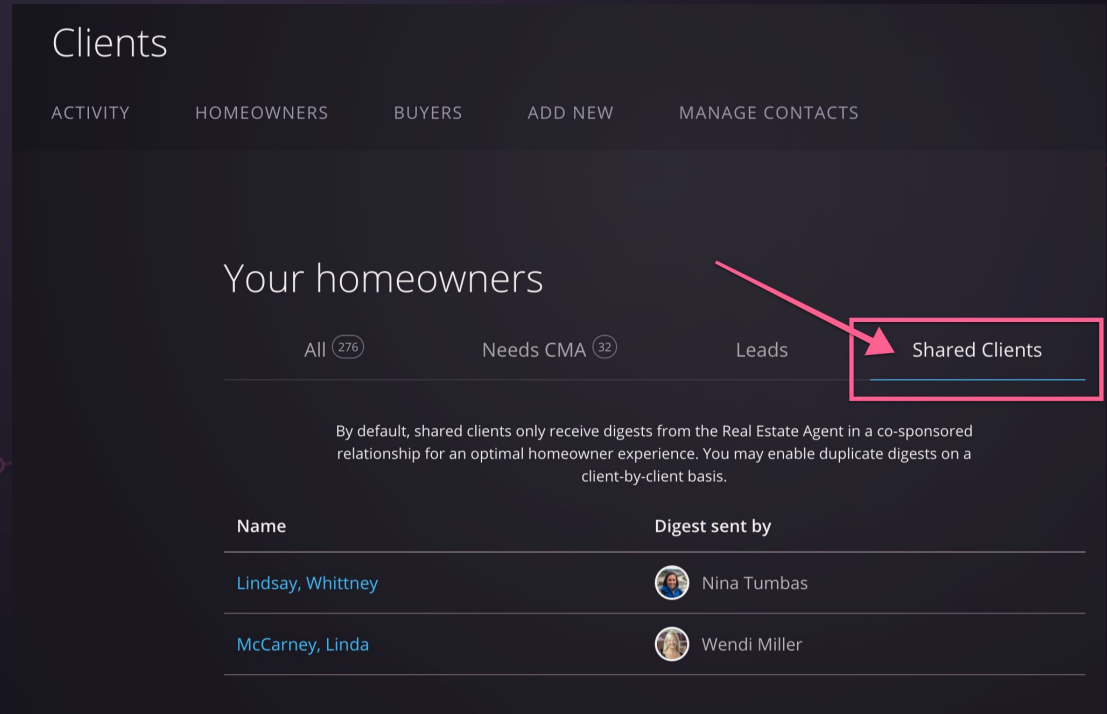
This short video is great for adding to your presentations on Homebot or sending to an agent partner for a quick explainer.





Cosponsor Best Practices & FAQs

Shared Clients

- Clients are considered shared when the **email** and **home address** are the same in the Loan Officer and Agents account
- Shared clients can be tracked under your Homeowner tab in the **Shared Clients subtab**
- Since Loan Officers are co-branded on every outgoing Digest sent from the Agent's Homebot, **Homebot pauses the Digest sent from the Loan Officer and defaults to sending it from the Agent.**



The screenshot shows the 'Clients' management interface. At the top, there are navigation tabs: 'ACTIVITY', 'HOMEOWNERS', 'BUYERS', 'ADD NEW', and 'MANAGE CONTACTS'. Below these, the main heading is 'Your homeowners'. Underneath, there are filter tabs: 'All (276)', 'Needs CMA (32)', 'Leads', and 'Shared Clients'. The 'Shared Clients' tab is highlighted with a red box and a red arrow pointing to it. Below the tabs, there is a text block: 'By default, shared clients only receive digests from the Real Estate Agent in a co-sponsored relationship for an optimal homeowner experience. You may enable duplicate digests on a client-by-client basis.' At the bottom, there is a table with two columns: 'Name' and 'Digest sent by'. The table contains two rows of data.

Name	Digest sent by
Lindsay, Whitney	 Nina Tumbas
McCarney, Linda	 Wendi Miller

Assign
CMAs to
your
co-sponsor
ed agents

The screenshot shows the Homebot 'Clients' dashboard. At the top, there are navigation links for 'Clients', 'Agents', 'Share', and 'Customize', along with a user profile icon and 'Account'. The main heading is 'Clients', with a sub-menu containing 'ACTIVITY', 'HOMEOWNERS', 'BUYERS', 'LEADS', 'ISSUES', and 'ADD CLIENT' (with a 'New' badge). The '30-day performance' section features two data cards: one for 'Homeowners' and one for 'Buyers'. The Homeowners card shows 17 Home Sends (with a 'More Details' link), 11 Home Opens (64%), and 8 Home Views (47%). The Buyers card shows 18 Buyer Sends (with a 'More Details' link), 10 Buyer Opens (55%), and 4 Buyer Views (22%). Below this is an 'Activity feed' with filter buttons for 'All', 'Active Homeowners', 'Active Buyers', and 'Hide clients that only have views'. The activity feed lists actions for three agents: John Reynolds (tuned value, requested cma, viewed home 4 times, used homebot for chrome 5 times, installed homebot for chrome), Jesse Reynolds (viewed new home panel, tuned value, viewed home 4 times, viewed new home panel 4 times, buyer viewed markets), and Vince Clark (viewed home, viewed home).

Homeowners	HOME SENDS	HOME OPENS	HOME VIEWS
More Details	17	11 64%	8 47%

Buyers	BUYER SENDS	BUYER OPENS	BUYER VIEWS
More Details	18	10 55%	4 22%

Activity feed

All Active Homeowners Active Buyers Hide clients that only have views

John Reynolds

tuned value (a minute ago) | tuned value (Over the last 30 days) | requested cma | viewed home 4 times | used homebot for chrome 5 times | installed homebot for chrome

Jesse Reynolds

viewed new home panel (21 hours ago) | tuned value (Over the last 30 days) | viewed home 4 times | viewed new home panel 4 times | buyer viewed markets

Vince Clark

viewed home | viewed home