THE HOMEBOT GETTING STARTED PLAYBOOK

Set it up once. Stay top of mind for life.

Your step-by-step reference for launching Homebot — from a polished profile and your first client upload to the weekly habits that turn engagement data into closed loans.

10 steps · Built for Lenders

Homebot works while you don't — once it's set up right.

Every report and email your clients receive carries your name, your photo, and your links. The few minutes you spend on your profile show up in every inbox, every month, for as long as they own the home.

After that, the job is simple: add your clients, tell them it's coming, and let what they click decide who you call.

This playbook walks the ten steps in order. Optional steps are marked — skip them today and come back once your database is live.

Join the **Homebot Community ↗** to stay current on product updates, network with other subscribers, and watch short onboarding videos.

Prefer to learn live? Save a seat on the **education calendar ↗** for weekly workshops and Q&A.

THE ONE SHORTCUT

Add yourself as a client with a personal email first. You'll see exactly what your clients see — before they see it.

WHAT'S INSIDE

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Where everything lives.

Seven tabs cover all ten steps. Every page in this playbook tells you exactly where to click.

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Ask who to contact today and why · query Partner Intel market data

STUCK ANYWHERE?

Click the pink icon at the bottom right of your account. **Search for Help** opens scripts and on-demand training; **Send a message** or **Ask a question** reaches the support team.

Make it yours.

Profile, welcome touches, integrations, video.

Do this before you add a single client — it populates every report and email they'll ever get from you.

STEP 01 Navigate to the Account tab → Profile

Set up your account for success.

Your profile populates every report and email sent to your clients and prospects.

PROFILE ESSENTIALS

- ✓ Confirm your contact info and NMLS ID.
- ✓ Add your website URL, LinkedIn, and state license(s).
- ✓ Write in your title.
- ✓ Add a custom disclaimer if your company requires one — it appears in all modules and email footers.

CUSTOM LINKS

Loan application URL

Drives clients to explore financing options.

Calendar / scheduling link

Clients book a call with you directly — and you're notified in your activity feed when someone clicks it.

Profile photo

Upload a professional one — it appears in every email and report.

Brand details

Fill in if you'll co-sponsor agents: years in the industry, what sets you apart, even an intro video. It shows on their clients' reports.

Password & bookmark

Set one under Account → Password so you’re not stuck requesting a magic link. Bookmark homebotapp.com.

Billing

Track clients loaded vs. capacity before extra fees, download invoices, and update your card.

7 steps to set up your account ↗ Training: Onboarding and Best Practices ↗

Put your voice on the first hello.

Two separate first impressions: the welcome email lands in their inbox, the welcome video plays the first time they open Homebot.

Step 02 Account tab → Click Digest Settings

Customize your welcome emails

The **only email you can fully customize**. At minimum, read both versions — homeowner and buyer. Better: update them in your voice. Subject lines are editable, but the defaults are tested for deliverability.

DIGEST RULES TO KNOW

- Homeowners get two emails a month — a Home Digest and a Market Update, about two weeks apart. The Market Update can be turned off.
- Cadence is monthly — not quarterly, not per client. While the toggles are pink, sends are automatic.
- Emails toggle off for all homeowners or all buyers — not a single client.

Customize the welcome email ↗

Step 03 Video tab → Embed Video → Welcome

Add a welcome video

Add one for homeowners and one for buyers. A thumbnail shows in the welcome email; the video plays once they click through to their Home Digest or Home Search.

1. Record it on your phone or laptop.
2. Upload to a supported platform — a free YouTube account works.
3. Paste the share link (for YouTube, just the URL) into Homebot.

Need words? Pink icon → Search for Help → Scripts collection. Videos can also go in the Refi or Prequal modules.

Embed a welcome video + script ↗

STEP 04 Navigate to the Account tab → Click Power-Ups

Connect the tools you already pay for.

Three integrations extend Homebot into video, cost analysis, and your CRM.

BombBomb

Record a video message to an individual client right from their report.

Requires a paid BombBomb account — any screen recorder works too (p. 09)

Mortgage Coach

Lets homeowners download a Total Cost Analysis from the Refi module.

Requires a paid Mortgage Coach account

Zapier

Syncs client data between your CRM or LOS and Homebot automatically.

Requires a paid Zapier account

MORE POWER-UPS

These are the ones most customers start with. See the full list at **Integrations & Power-Ups** ↗

VIDEO · OPTIONAL Navigate to the Video tab

Use video to share a message.

Proactive education reminds clients you're the one to call when questions come up.

VIDEO EMAIL · EVERYONE

One video to all your homeowners or all your buyers. It lands as a thumbnail in their inbox — opening it pulls them into Homebot and lifts your click rate.

Ideas

- Market updates and trends
- Address a fear you keep hearing — "Is now the right time?"
- Answer one frequently asked question a month

Sends the following morning, in batches over **7 days**.

PERSONAL VIDEO · ONE CLIENT

Record yourself and their report at the same time, then send the link by text or email. Great for annual reviews or sparking a conversation.

Tools

- **BombBomb** — the red record button on their report (Power-Up)
- **Any screen recorder** — Zight, Zoom, or similar. BombBomb isn't required.

Talk about what you see: market conditions, principal vs. interest, refi or cash-out scenarios.

You won't find this in the Video tab. For step-by-step instructions, **click here** ↗

Sample script PERSONAL VIDEO

"Hi [Name], this is [you] from [company]. I was just looking at your Homebot report — your market is balanced and holding steady, with a slight seller's advantage. If you ever have questions about how your neighborhood is doing or whether it's a good time to sell, reach out through the chat bubbles in your report or call me directly."

Add your clients. Then tell them it's coming.

Clients engage more when they're expecting the email.

Upload one at a time or in bulk, and work a one-line introduction into your intake and closing conversations.

STEP 05 Navigate to the Clients tab → Click Add Clients

Add your clients.

One at a time for new closings. In bulk to get your whole database working at once.

ONE AT A TIME

Next day welcome email

sends the following morning

Required fields

- First name, last name, email
- Client type: Homeowner or Buyer
- **Homeowners:** street address and zip. Loan data is optional but improves accuracy.
- **Buyers:** current address and/or pre-qual data — required for home search content.

The success message links to their profile — review it before it sends, or send now (p. 14).

BULK UPLOAD

Minutes until clients appear in your account.

How it works

- CSV or Excel. Keep clients and prospects on separate spreadsheets.
- **Required columns:** first name, last name, email, street address, zip code. Street address is street only — no city or state.
- **Optional:** add columns for phone number and total loan amount. The template has far more than you need.
- **Welcome emails send in batches over 7 day period.**
- Buyers without an address or pre-qual get an opt-in email instead of the welcome.
- Stuck? **Need help** opens a 4.5-minute walkthrough.

PRO TIP

Add yourself as both a homeowner and a buyer with a personal email, then click through everything. The more you use it, the easier it is to explain.

How to add clients ↗

STEP 06

Introduce Homebot before they receive it.

Make Homebot a closing gift on your closing checklist, and part of new-client intake. Give them a heads-up out loud — tap a card to copy.

Script 01 NEW HOMEOWNERS AT CLOSING

"I've invested in a tool that lets you track your home's value and discover ways to leverage your equity over time. You'll be receiving an email from me shortly with access to that."

Script 02 NEW BUYERS AT INTAKE

"I'm setting you up with a private, ad-free home search experience that helps you easily find listings and is tied to real financing data, so you can understand what a potential purchase may cost. Keep an eye out for an email from me."

MORE SCRIPTING IDEAS

Scripts for introducing Homebot ↗ 90-day proactive outreach playbook ↗

Practice it in a live workshop ↗

Let engagement tell you who to call.

Client profiles, activity feed, opportunity lists, HomebotAI.

Homebot watches what every client views and sorts them for you. Your job is to pick up the phone.

STEP 07 · PART ONE

Navigate to the Clients tab → Use the search bar to find a client

Your client profile.

Everything about one client — homes, loans, report, activity — and the actions to take on it.

SEND THEIR REPORT NOW

- **Homeowners:** Homes tab → Send home digest email.
- **Buyers:** Home Search tab → Send home search email.
- Never received the welcome email? That one sends first.

CHECK THE VALUE

- Preview client report, then click their address to see what they get each month.
- Value looks off? **Add a CMA** — enter the value and give them a range to play with.
- Clients can tune their own value from their Home Digest.

KEEP DETAILS CURRENT

- **Edit** to update contact info or loan data.
- Wrong address, or they sold? Delete the property and add the correct or new one.
- Loan details missing? Preview their report → **Manage home loan** to edit, add, or update a balance.

TEAM TAB · PREFERRED AGENTS

- Each client can have a different preferred real estate agent — just name and email.
- They're featured in real estate modules and on every Home Search listing, and notified of real estate questions.
- Free for you and for them. They're told within a week and invited to claim a free profile.
- Insurance agents can be added, but must sign up for Homebot to claim a profile.
- Then call the agent to let them know — an easy, value-first opener.

Important: Homebot won't automatically know if a client sells or buys a home. Update their profile manually.

Add preferred agents ↗ Manage homeowners & buyers ↗

Your dashboard & activity feed.

The dashboard gives you a 30-day snapshot of email performance — sends, opens, clicks — and surfaces who needs you now.

ON YOUR DASHBOARD

- Total clients and agent co-sponsors
- **Listing alerts** for clients and co-sponsored agents who list a property
- **Highly engaged clients**
- **Direct messages** from clients
- **Email engagement** — click rate is your view rate. Aim for 40–50% with past clients; below 40%, send a video email.

WHY ENGAGEMENT MATTERS

3.6x

Highly engaged clients are 3.6x more likely to close a loan with you.

Activity feed

Navigate to the Clients tab → Click Activity

See exactly what each client is viewing — listings, calculators, refinance and cash-out options, and more. **Use it as your call list.** Each client's profile has its own feed too.

They looked at an affordability calculator

Call them.

They just viewed their digest

Normal early on. Check in anyway.

Reach out without feeling watched.

Speak to what they're looking at — never the click itself.

They viewed their digest
Very normal early on

"Just wanted to see how you're doing — are you liking Homebot? Any questions about what you're seeing? I'm here when you need me."

Browsing listings, not pre-qualified
Talk about the market

"I was looking at your Home Digest and noticed there's been some activity in your market — it's becoming more of a seller's advantage."

Checking cash-out options
Talk about equity

"I noticed your equity has increased. Here's how people typically use theirs — let me know if you ever have questions."

PRE-QUAL REQUEST Action Items

- You get an email. Call, or reply to it — your reply reaches the client.
- Provide the pre-qual if they're interested.
- Add the details on their profile's **Home Search** tab.

CMA REQUEST Action Items

- They want a professional valuation — an agent motion.
- Make sure their preferred agent got it, assign it to a co-sponsored agent, or connect them with an agent you trust.
- Click **Complete CMA**, enter the value, and give them a range.

Direct messages can't be answered inside Homebot. Call or reply to the notification email, then check the box to clear it.

STEP 07 · PART FOUR   Navigate to the Clients tab → Your Clients

Opportunity lists & maintenance.

Homebot sorts your database automatically, based on what clients do — using calculators, viewing listings, checking purchase potential.

OPPORTUNITIES

High equity
Cash-out or move-up conversations

Likely to sell / buy
Your warmest leads

Ready for refi
Rates above the national average

ACTION ITEMS

Needs CMA / Needs Pre-Qual
Clients who've requested info. How to handle each is on p. 16.

MAINTENANCE

Email issues
Not receiving Homebot but still count toward your total. Get a valid email, or ask why they unsubscribed.

Incomplete clients
Click their name to add a home or buyer details.

Missing home value
Reports pause until data arrives. Keep them — sends resume automatically — or delete.

Working a list

- The top of each list is your hottest leads.
- **Quick look** → add notes, or the date you texted if they didn't answer.
- Send a video to the whole list, or pick who gets it.
- After you reach out, remove them from the list.
- Sort by equity to target a group — say, clients at 100% equity.
- Add high-equity clients to an email campaign outside Homebot.

Manage homeowners & buyers ↗   Engagement into call lists ↗

 Navigate to the HomebotAI tab

Ask HomebotAI who to call today.

No more combing through your activity feed and lists. It does the thinking — you take the action.

FOR EVERY CLIENT IT RECOMMENDS

1. **Why** they made the list
2. **Talking points** for your outreach
3. A **draft email** — send as-is or edit first

OPPORTUNITY TYPES IT READS

Ready for Refi · Just Listed · Likely to Sell · High Equity · Likely to Buy · Highly Engaged

Answers stream in live — text, charts, and tables build as you watch.

// Try asking · tap to copy

"Show me who I should reach out to today and why."

"Do any of my clients have a high likely-to-sell score and over 70% equity?"

"What about my refi candidates this week?"

"Any clients I should reach out to about their equity?"

Stuck?
Ask “What insights should I look into?” or use a provided prompt.

Set priorities
Tell it what matters — say, refi over move-up buyers.

Give feedback
Thumbs up or down on any answer shapes what's built next.

Available to individual paying lenders. On an enterprise plan and don't see it in the left nav? Contact your customer success manager.

HomebotAI in the help center ↗

Grow past your database.

Agent partners and new leads.

Once your clients are live, put your name in front of agents' clients — and anyone who finds your landing page.

Partner with agents.

Co-sponsor the agents you already work with. Use Partner Intel to find the ones you should.

Step 08 Navigate to the Co-Sponsor tab → Invite

Co-sponsor agents

You're featured as the trusted lender in the financial sections of every report sent to their clients.

- Featured in Refi, Cash-Out, and on every Home Search listing
- Notified when their clients ask financial questions
- Completely separate databases
- Invite by direct email or your custom co-sponsor link

All new plans include **one agent co-sponsor**. Additional agents are typically $25/month each. Enterprise plans may include discounts or free seats.

Training: Landing Agent Partners ↗

Co-sponsorship resources ↗

Step 09 Navigate to the Partner Intel tab

Find partners with Partner Intel

Understand the relationships you have and find new ones. Agent profiles show performance, top loan officer relationships, how you stack up, and upcoming listings.

1. Start with current connections: every agent you've done a buy-side deal with in five years — with you vs. without you.
2. Search by name, license, or location, then filter. The Brokerage tab compares a whole office's roster.
3. Turn on **No Current Co-Sponsor** to find agents on Homebot without a lender.
4. Favorite an agent (heart icon) to get their listing alerts — a built-in reason to reach out.

Training: Partner Intel 101 ↗

How to use Partner Intel ↗

AGENT PITCH KIT

Search “agent pitch kit” in the help center: pitch deck, email invite templates, a one-pager, and an explainer video. Outreach scripts live under Scripts → Scripts for loan officers and agent outreach.

 Navigate to the HomebotAI tab

Ask market questions on the spot.

HomebotAI writes its own queries against Partner Intel data — no filters, no spreadsheets.

Market share
By state — including yours

Agent rankings
Down to the zip code

Lender competition
Who agents close with

Acquisition analysis
Where to grow next

// Try asking · tap to copy

"Who are the top agents in [zip code]?"

"My client might sell. Who are the top 3 listing agents by closed deals in their state over the last 12 months, and which brokerages are they with?"

"Show me all of [agent name]'s top loan officers from the last 24 months."

"What's my market share in [state]?"

THE PLAY: FIND YOUR NEXT AGENT PARTNER

1. Ask HomebotAI for the top agents in your zip codes.
2. Ask who their top loan officers are — see where you stack up.
3. Open them in Partner Intel. Favorite them for listing alerts, and check for **No Current Co-Sponsor**.
4. Reach out with the agent pitch kit and a co-sponsor invite.

How to use Partner Intel ↗

STEP 10 · OPTIONAL Navigate to the Share tab

Generate leads with landing pages.

Branded pages for homeowners and buyers, unique to your account.

01 **Share your link**

Anywhere people already see your name.

02 **They fill out the form**

They're added to your account under Clients → Leads, and you get an email.

03 **Homebot takes it from there**

They automatically start receiving the Home Digest or Home Search experience.

WHERE TO SHARE IT

Social posts	Email & newsletters	QR codes for farming
In person	Website widget	Print marketing

Referrals count too. The Share Homebot button at the bottom of every Home Digest lets clients share with friends and neighbors — sign-ups land in your Leads tab.

Training: Build Your Database ↗ How to generate leads with Homebot ↗

Weekly habits for success.

Setup is a one-time job. These six take less than an hour a week.

- [ ] **Log in at least once a week**
  Ask HomebotAI who to contact today, then scan your activity feed.

- [ ] **Call 2–4 clients per week**
  Let your opportunity lists and activity feed pick who.

- [ ] **Check listing alerts**
  Reach out to the agents who are active.

- [ ] **Monitor your 30-day snapshot**
  Aim for 40–50%. If it drops below **40%**, send a video email — market updates and trends at scale are a great way to boost engagement.

- [ ] **Keep client profiles current**
  Update addresses when clients buy or sell.

- [ ] **Clear action items and maintenance**
  Answer pre-qual and CMA requests; fix email issues and incomplete profiles.

Turn engagement into call lists ↗ 90-day proactive outreach playbook ↗ Join a live workshop ↗

CLOSING

Support & training.

Every on-demand training lives inside your account: pink button (bottom right) → Search for Help → On-Demand Customer Education → Training for Loan Officers.

TRAINING	WHAT IT COVERS
Getting Started on Homebot	Account setup, adding clients, managing clients, and more
Best Practices	Opportunity lists, outreach strategy, engagement, video, and more
Build Your Database	Landing pages, lead generation
Landing Agent Partners	Co-sponsorship, pitching agents, Partner Intel
Guide to Using Video	Embedding videos, video email, BombBomb
Homebot Mobile App	Setting up and promoting the app

Account or billing

Pink icon (bottom right) → Send a direct message to support.

Call us

720.477.4744 · 9am–5pm MST, Mon–Fri

Live workshops: education calendar ↗ Join the Homebot Community ↗ More playbooks ↗