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 listings, buyers, and referrals.

9 steps · built for real estate agents

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 nine steps in order. Optional steps are marked — and so are the features that need a **lender co-sponsor**, since that one connection unlocks the full experience.

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

Prefer to learn live? The **education calendar ↗** lists upcoming workshops, including weekly onboarding for agents.

THE ONE SHORTCUT

Add yourself as a client with a personal email first. You'll see exactly what your clients see — and explain it better because of it.

WHAT'S INSIDE

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Where everything lives.

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

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LOOK FOR THIS TAG

NEEDS LENDER CO-SPONSOR

Adding buyers, using video, home search, and the mobile app all unlock with a lender co-sponsor (p. 08).

STUCK ANYWHERE?

Click the pink icon at the bottom right of your account. **Search for Help** opens scripts, guides, and client-experience videos; **Ask a question** or **Send us a message** reaches the support team.

Make it yours.

Profile, welcome email, lender co-sponsor, 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 at the bottom left → Profile tab

Set up your account for success.

Your profile is displayed on every report and automated email sent to your database.

PROFILE ESSENTIALS

- Confirm your contact info is correct.
- Add your website, if you have one.
- Upload a profile photo you're proud of — your moneymaker. It will be all over the Homebot experience.

CUSTOM LINKS

Calendar / scheduling link

Encourage clients to book a call with you directly from their report.

Company admin

Update your logo and office info. Don't see the button? You may be on an enterprise account — contact support.

Password & bookmark

Set a password so you're not stuck sending yourself a magic link every time you log out. Bookmark the page for easy access.

Billing

Track clients loaded vs. capacity before extra fees, download invoices, and update your card. Plans are month to month — cancel any time.

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

STEP 02 Navigate to the Account at bottom left → Click digest Settings

Put your voice on the first hello.

Adding a client opts them in. The welcome email is the first thing they get — and the only email you can customize.

WELCOME EMAILS

Click **Edit** on the homeowner or buyer welcome email. This is how Homebot explains its value to your database — at minimum, read it.

- Pull nuggets from it to introduce Homebot to clients before they receive it (p. 13).
- The buyer welcome email applies once you have a lender co-sponsor.

Customize the welcome email ↗

WHAT HOMEOWNERS GET EACH MONTH

1. **Home Digest** — sent when their home value updates with the market.
2. **Market Update** — about two weeks later. Is their ZIP heating up or cooling down? A nudge back into Homebot.

- Want one email a month? Turn off the Market Update and save.
- Cadence is monthly and can't be changed.
- Clients can unsubscribe like any other email service.

WANT TO SEE IT FIRST?

Add yourself as a client. Your welcome email, Home Digest, and Market Update arrive just like your clients' will.

STEP 03 · RECOMMENDED

Navigate to the Co-sponsor tab → Click Find a lender

Get a lender co-sponsor.

One lender partner unlocks the full Homebot experience — and reduces what your monthly cost.

WHAT IT UNLOCKS FOR YOU

- **Homebot for Buyers** — add buyers and prospects to a private, nationwide home search tied to MLS and financing data
- **Custom listings** — connect your preferred IDX
- **Video** — welcome, embedded, and video email
- **The mobile app** for your clients
- Listing and calculator activity in your feed, plus the **Likely to Buy** list

ON THE SOLO PLAN

$25/mo

A co-sponsor drops your cost from $50 to $25 a month.

HOW IT WORKS FOR THE LENDER

- They need their own paid Homebot plan.
- You're both notified when a client asks a financial question.
- The first agent they co-sponsor is included in all new Homebot plans; $25/month per agent after.
- Featured in finance modules — refi, cash-out, pre-qual.
- Databases stay completely separate.
- Their win: supporting you and reaching your database.

No lender yet? The Find a Lender tab shows lenders active on Homebot in your area who are open to co-sponsoring. You can also search by name or email.

Co-sponsorship resources ↗

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

Connect the tools you already use.

Nice to have, not required — Homebot delivers value without any of them.

BombBomb

Record a video message to one client while previewing their report. Log out of BombBomb first, then click Get Started.

Requires a paid BombBomb account — any screen recorder works too (p. 10)

Follow Up Boss & Sierra

Direct CRM integrations. Search the help center for setup instructions.

Follow Up Boss · Sierra Interactive

Zapier

For any other CRM. Tag clients in your CRM and they trickle into Homebot automatically.

Requires a paid Zapier account

Custom listings

Connect your preferred IDX so clients also explore listings on your site. Trouble connecting? Send support the link — they'll set it up or tell you why it won't work.

NEEDS LENDER CO-SPONSOR

MORE POWER-UPS

Video email, the mobile app, and home search also live here. See the full list at **Integrations & Power-Ups ↗**

VIDEO · OPTIONAL   Navigate to the Video tab   VIDEO TAB NEEDS LENDER CO-SPONSOR

Use video to share a message.

Add value on top of what Homebot already offers — and remind clients you're the one to turn to.

WELCOME VIDEO

Separate from the welcome email. It plays inside Homebot the first time they open it.

EMBEDDED VIDEOS

Placed in a module — say, using equity to buy, in the Purchase module. Embedded videos aren't sent out.

VIDEO EMAIL

Market updates and trends to all homeowners or all buyers. Great for boosting engagement.

Adding a video

1. Record it outside Homebot.
2. Upload to a supported platform, like YouTube.
3. Paste the URL, embed ID, or embed code, then save.

Personal video · one client

NO CO-SPONSOR NEEDED

- Walk them through their report — annual reviews, or to spark a conversation.
- **BombBomb** adds a red record button to their report.
- Or use **Zoom** or **Zight** — share your screen, camera on, record.

Send a personalized video ↗

Sample script   WELCOME VIDEO

"Hi, it's [you] with [brokerage] — welcome to Homebot. Each month you'll see what your home is worth, how your market is moving, and ways to put your equity to work. Whenever a question comes up about buying, selling, or your neighborhood, I'm the one to call."

More scripts: pink icon → Search for Help → Video scripts. For video examples, search YouTube for "Homebot welcome video."

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

Without clients, there's no one to nurture.

Upload one at a time or in bulk, and build a quick introduction into your intake and closing process.

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

What we need

- Everything next to a red asterisk.
- **Homeowners:** home address and ZIP. Sold and appraisal info are optional.
- No loan data needed — Homebot pulls what it can from public records, and clients can correct it.
- **Buyers:** first name, last name, email. Needs a lender co-sponsor.

The success message links to their profile — check the value, or send now (p. 15). Agents on a Freemium account can only add clients one at a time.

BULK IMPORT

Minutes until clients appear in your account.

Five required columns

First name | Last name | Email | Street address | ZIP

Optional

Phone number | Sold info | Appraisal info

- CSV or Excel. Clients and prospects on separate sheets — prospects need only first, last, email.
- Street address column: street only — no city or state for homeowners.
- Fix spreadsheet errors directly in your account before importing or export error rows and fix later.
- **Click import — clients show up within minutes. Welcome emails delivered in batches over 7 day period.**

PRO TIP

The bulk template is only a reference — it has far more columns than you need.

How to add clients in bulk and one at a time ↗

STEP 06

Introduce Homebot before they receive it.

Offer Homebot as a gift. Build it into your closing process and new-client intake — anytime you introduce it first, engagement goes up. Tap a card to copy.

Script 01 NEW HOMEOWNERS AT CLOSING

"As a thank-you, I'm setting you up on Homebot. You'll be able to track your home's value and discover ways to leverage your equity over time. Keep an eye out — you'll get an email from me soon."

Script 02 BUYERS & PROSPECTS AT INTAKE NEEDS LENDER CO-SPONSOR

"I'm setting you up with a private home search that makes it easy to find listings with seller concessions, assumable loans, and sellers likely to negotiate — plus calculators to see what a purchase would cost. Watch for an email from me."

Who to add as buyers

Pre-qualified, pre-approved, just curious about the market — or the ones who recently fell through the cracks.

More scripting ideas

Scripts for introducing Homebot ↗

Or borrow lines from your welcome email (p. 07).

Let engagement tell you who to call.

Client profiles, dashboard, activity feed, opportunity lists.

Homebot tracks 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 your client

Your client profile.

Search by name, address, or email. Everything about one client — homes, buying, team, activity — lives here.

CHECK THE VALUE

- Review the estimated value before they receive it.
- Looks off? **Add a CMA** — enter the value you'd expect (say, $445K instead of $432K) and set a confidence range.
- Clients can tune their value within that range later.

SEND THEIR REPORT NOW

- **Homeowners:** Send Home Digest email.
- **Buyers:** Send home search email.
- No waiting until tomorrow. If they've never had the welcome email, it sends first.

KEEP DETAILS CURRENT

- **Edit** to update contact info.
- **Homes tab:** edit home details, add a co-borrower. Wrong address, or they sold? Delete the home, then Add a home.
- **Buying tab:** edit preferences. Buyer just purchased? Remove buyer details and add their home.

TEAM TAB · PREFERRED PROS

- Add the client's loan officer — just name and email — to keep them in the loop on finance questions.
- They get an email explaining what to expect.
- Add insurance agents too — all their pros in one place.

Before every call: preview their report. You'll spot talking points worth bringing up. Add notes to the profile, and with BombBomb connected, record a walkthrough right there.

Add preferred pros ↗   Manage homeowners & buyers ↗

Your dashboard & activity feed.

You land on the dashboard — a quick snapshot of how your account is performing. You'll spend most of your time in Clients.

ON YOUR DASHBOARD

- Total clients loaded
- **Email engagement** — sent, opened, clicked. Click rate is your view rate.
- **Messages** — DMs can't be answered in Homebot. Reply to the email or call, then check the box to clear it.
- View rate low? A video email to all homeowners or buyers can lift it.

VIEW-RATE TARGET

40–50%

With homeowners you've spoken to or worked with before.

Activity feed

Clients → Activity

Who was in Homebot most recently and what they did — selling position, purchase potential, the short-term rental calculator, and (with a co-sponsor) listings and mortgage calculators. **Log in weekly and pick 2–3 people to reach out to.**

They just viewed their digest

Perfectly normal. Check in anyway.

Suddenly checking selling position

A behavior change. Reach out.

Reach out without feeling watched.

Never say "I saw you looking at..." Keep it general, dangle a carrot, start a conversation.

Just getting started A general check-in	"Just wanted to touch base and see how you're doing — how are you liking Homebot? I want to make sure it's valuable. Any questions about what you're seeing?"
Engagement changed Haven't talked in a while	"It's been a while — I wanted to check in. Is your home still working for you, or has anything changed with what you need?"
Their market moved Talk about the market	"I noticed some changes in your neighborhood's market and wanted to share how they might affect you. Do you have a few minutes this week?"

CMA REQUEST · Action Items

- They tuned their value and asked for a professional opinion. You get an email.
- Call, or reply to the email — it reaches them. Offer your opinion if you have the bandwidth.
- Do the CMA outside Homebot, then click their name → **Complete CMA**, or delete it.

PRE-QUAL REQUEST · Action Items

- You and your lender co-sponsor are both notified.
- Tell your lender whether to follow through — or pass it to the client's preferred loan officer.
- Then **Complete pre-qual** with the lender's data, or delete it.

STEP 07 · PART FOUR

Navigate to the Clients tab→ Your Clients

Opportunity lists & maintenance.

Homebot sorts your database automatically. Every Monday you'll get an email with who landed on a list the week before.

OPPORTUNITIES

Likely to sell
Your listing conversations

Likely to buy
Significant home search or calculator activity (co-sponsor)

High equity · Highly engaged
Move-up and check-in calls

Just listed · Ready for refi
Timely reasons to reach out

ACTION ITEMS

CMA & pre-qual requests
Clients who've asked for something. How to handle each is on p. 17.

MAINTENANCE

Email issues
Use it as a call list. Unsubscribed? Ask why — it may have been an accident.

Incomplete profile
Missing a home address or buyer details — add one.

Missing home value
Often rural or new construction. Keep them (reports start once data arrives) or delete.

Working a list

- The top of each list is your hottest leads.
- After you call, check the box to snooze them until new activity.
- Select clients and send a video (co-sponsor).
- **Quick look** shows why they landed there, and when.
- Sort by equity amount or rate, depending on the list.
- Add likely sellers to a seller-nurture campaign outside Homebot.

Don't use Add a CMA to fill in a missing value — it won't move with the market and stays flat month over month.

Manage homeowners & buyers ↗ Engagement into call lists ↗

Grow your database.

New leads, the mobile app, and staying findable.

Once your clients are live, capture new leads, get Homebot on their phones, and put your expertise where people are searching.

STEP 08 · OPTIONAL Navigate to the Share tab

Generate leads with landing pages.

A homeowner page for everyone; buyer pages once you have a lender. All unique to your account.

01 Share it with intention

Not just "find out what your home is worth." Give a juicy reason to sign up and make the next step clear.

02 They sign up

You get an email notification, and they land in Clients → Leads.

03 Homebot takes it from there

They start receiving Homebot and appear in your activity feed like any other client.

WHERE TO SHARE IT

- QR codes for farming
- Social posts
- Email campaigns

Website widget. Copy the embed code from the Share tab and paste it into your site's back end to capture leads there, too.

How to generate leads with Homebot ↗ Scripts → Scripts for using your landing pages

STEP 09 · OPTIONAL

Stay in their pocket — and in search.

Put Homebot on your clients' phones, and put your expertise where people look for agents.

Mobile app NEEDS LENDER CO-SPONSOR

Especially useful for buyers — they take home search on the go.

1. Clients download **Homebot** from the App Store.
2. They log in with the email tied to their Homebot.
3. They're connected with you.

To try it yourself, add yourself as a client with a personal email — your Homebot login email won't work.

PRO TIP: Be findable by AI

AI has changed how people find professionals in their market. Consistent, educational content helps AI recognize you as the local expert.

- Post videos to your social channels and website.
- Cover your market, happy clients, local events, and new businesses.
- Keep your message consistent across every platform.
- Post at least once a month.

Watch the webinar: how to win AI search ↗

DOUBLE DUTY

The market-update video you post publicly can go out as your monthly video email too — one recording, two audiences.

Weekly habits for success.

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

- [ ] **Read your Monday email**
  New name at the top of a list? Call, or hop in and see what changed.
- [ ] **Log in at least once a week**
  Scan your activity feed for client engagement and behavior changes.
- [ ] **Reach out to 2–3 clients**
  Let your opportunity lists pick who. Preview their digest first.
- [ ] **Watch your view rate**
  Aim for 40–50% click rate with past clients. Falling short? Introduce Homebot more often, or send a video email. Video email requires a lender co-sponsor.
- [ ] **Keep client profiles current**
  Add new closings, and update homes when clients buy or sell.
- [ ] **Clear action items and maintenance**
  Answer CMA and pre-qual requests; call through email issues; fix incomplete profiles.

Turn engagement into call lists ↗   90-day proactive outreach playbook ↗

Support & training.

Most answers are a search away: pink icon (bottom right) → Search for Help. Explore the collections or type a keyword.

HELP CENTER COLLECTION	WHAT IT COVERS
Getting started guides	Account setup, adding clients, managing your database
Best practices	Opportunity lists, outreach strategy, engagement
Scripts	Introducing Homebot, video scripts, landing page posts
Client experience	Short videos of what homeowners and buyers receive
Generate leads	Landing pages, website widget

Ask support

Pink icon → Ask a question.
Mon–Fri, business hours.

Email

support@homebot.ai

Call us

720.477.4744

Live every week: Onboarding & Best Practices for Real Estate Agents. Join as often as you like and bring your questions. See the education calendar ↗

Education calendar ↗   Join the Homebot Community ↗   More playbooks ↗