

THE HOMEBOT CUSTOMER PLAYBOOK

90 days to a closing-table relationship that lasts.

Thirteen plug-and-play scripts, sequenced across three 30-day phases — for title agents who turn every closing into a lasting relationship.

Made for Title Agents

Most closings are a goodbye. This is different.

The relationship shouldn't end when the ink dries. For most title agents, closing day is the last real touch — the homeowner moves in, the realtor and loan officer move on, and everyone forgets who ran the file.

Proactive outreach isn't more outreach. It's noticing instead of nagging. It means letting Homebot watch the data — home value, equity, market shifts, repeat opens — and showing up at the moment someone is already paying attention.

This playbook is the rhythm we've watched our best title teams and their partners build, distilled into 90 days and 13 scripts. Steal what works. Skip what doesn't.

By Day 90 you'll send fewer messages — and stay top of mind with the homeowners and partners who drive your next order.

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The best outreach doesn't feel like outreach.

It feels like a trusted expert who noticed something on your behalf and thought you'd want to know.

For most title agents, the hardest part of staying in touch isn't writing the message. It's knowing when. Rarely do you communicate to the homeowners post close — and partners feel pestered. Reach out too rarely and they forget you closed the deal by the time the next one comes around.

Homebot solves the timing problem. Every homeowner gets a personalized monthly report showing value, equity, and local market trends — and every time they open it, every module they linger on becomes a small signal that something might be on their mind.

Your job in this playbook isn't to script every interaction. It's to learn the rhythm — the moments when noticing a behavior, and reaching out with the right words, turns a one-time closing into a relationship that refers.

Each of the next three chapters takes one 30-day window of that rhythm and gives you the scripts to run it. Read it once front to back. Then bookmark it for easy access later.

THE PRINCIPLE

Don't reach out *because* a month has passed. Reach out *because* something is happening — and you noticed.

From one closing to a system **that runs itself.**

01 DAY

Set up & introduce

Add Homebot to your closing process. Bring it up at the table or in your post-closing follow-up — frame it as a complimentary gift, not another tool.

30 DAY

Build trust early

Homeowners understand why they're getting reports. Realtor and LO partners are added as preferred. Nobody's surprised when a report arrives.

60 DAY

Conversations get timely

You respond to real behaviors — equity moves, selling-position views, frequent opens. Each touch feels natural and unforced, for homeowners and partners alike.

90 DAY

The system runs itself

Fewer messages, better conversations. Homebot supports your workflow instead of adding to it. Homeowners and partners see you as the proactive one.

- Pair every week of this arc with your **Weekly Leaderboard Email** on Monday — that's how you'll spot the engaged homeowners and partners to call.

CHAPTER 01

Launch & activate.

Set expectations and build trust early.

You only get one shot at framing why you're sending these reports.

The first 30 days are about **why**, not what.

If your homeowners don't know why a monthly home report from a title company is in their inbox, they'll treat it like a newsletter and unsubscribe with their attention.

The biggest mistake in month one is assuming the product speaks for itself. It doesn't — not yet. Homeowners trusted you to close the biggest transaction of their life, and they need to hear, in your voice, that this report is a long-term gift, not a sales channel.

Three small moves do most of the work: introduce it at closing or in your follow-up, send a heads-up the day you add each homeowner, and add your Realtor and LO partners as preferred so the report shows them too.

YOUR DAY-1 TO DAY-30 CHECKLIST

- ✓ Add Homebot to your closing and post-closing scripts as a long-term value gift.
- ✓ Send the heads-up message (Script 02) within 24 hours of adding each homeowner.
- ✓ Check the activity feed at day 7 and day 14 — send Script 03 to anyone who hasn't opened yet.
- ✓ Add preferred Realtor/LO partners and send Script 04 so they know what to expect.

WINS BY DAY 30

Homeowners know *why* they're getting Homebot and trust the intent. Realtor and LO partners are added as preferred.

Three messages to open the relationship.

Note: Homebot sends an automated welcome email, and you can customize it. These scripts are meant to complement that.

[Learn how to customize the welcome email ↗](#)

Script 01 OPTIONAL

In-person

On the phone

Homebot introduction at the closing table

Send when you finalize the closing with the homeowner.

As a thank-you for closing with us, I've set you up with a tool called Homebot. It tracks your home's value and shows ways to leverage your equity over time. You'll start receiving a personalized home wealth report from us in the next few days — no cost, no catch.

From your title team, to your homeowner

You're not selling anything. You're **setting an expectation** — that you're the one paying attention long after the file closes.

Script 02

Email

Text

Homeowner "heads up" — first add

Send when you first add a homeowner to Homebot.

Hi **{Homeowner Name}** — quick heads up!

As a thank-you for closing with us, I've set you up to receive a personalized home report each month. It shows your home value, equity, and local market trends — helpful info so you can keep an eye on things.

Explore it anytime, and let your team know if you ever want to dig into the numbers together.

From your title team, to your homeowner

Script 03

Email

Text

Quiet homeowner — 1 to 2 weeks later

Send when a homeowner hasn't opened their report yet (check the activity feed).

I wanted to make sure you're receiving the home reports we sent over after closing.

They're a low-key way to track your home value and options — happy to answer any questions if you have them.

From your title team, to your homeowner

Script 04

Title → Partner

Email

Add a preferred partner (Realtor or LO)

Send when you add an Realtor or Loan Officer as preferred on shared clients.

Hey **{Partner Name}** — I've added you as a preferred partner on the home reports we send to our shared clients. It gives homeowners a clear view of their equity and buying power, keeps your name in front of them, and helps us stay aligned when they start thinking about a move or opportunity to talk financing.

You should receive an email within a week to claim your free profile (add your photo and contact info). Nothing else to do — just look out for real estate and financing questions from **{Homeowner Name}**.

Optional — for title teams adding partners

[Learn how to add a preferred partner ↗](#)

Script 05

Title → Preferred Pros

Partner Opportunity

Introduce the Partner Opportunity email

Send when Homebot begins delivering Partner Opportunity emails to your preferred pros — give them a heads-up so it never gets buried.

Hey **{Preferred Pro Name}** — keep an eye out for a **Partner Opportunity** email from Homebot landing in your inbox this week. It flags the exact clients in your database showing real buying/selling or financing signals right now.

Don't let it slip past — it's genuinely one of the most valuable emails you'll get all year. Star it, and reach out the moment it arrives so we can jump on those warm leads together.

Prime your pros so the Partner Opportunity email never gets missed

[What's in a Partner Opportunity email? ↗](#)

CHAPTER 02

Engage & identify opportunities.

Start conversations rooted in behavior.

The data tells you who's thinking about it. You just have to reach out.

Five behaviors worth a phone call.

In month two, your activity feed becomes the most valuable list in your business. Here's what to watch for — and which script to send when you see it.

1 Frequent opens

3+ opens in a month = active interest. Reach out to the partners to keep the dialogue warm.

Script 06

2 Selling position viewed

They're modeling what their home is worth right now. Open the door on timing — and be ready to refer your Realtor partner.

Script 07

3 Buying power explored

They're looking at move-up scenarios. Have their Realtor/Loan Officer ask if their current home still fits. Maybe they want to shop or talk financing?

Script 08

4 Equity interest

Equity moved or they're exploring options. Offer the strategic conversation — a refi or HELOC may mean a new order for your LO partner.

Script 09

5 Shared client active

For partners: loop in the Realtor or LO with a heads-up.

Script 10

USE YOUR BEST JUDGMENT

A new homeowner checking their selling position likely isn't thinking about selling yet — they're probably just curious about their equity. Consider where they are in their homeownership journey before reaching out to a partner and getting them involved. Homebot helps automate these signals to inform the partner at the right time to remove the guesswork on your end.

When the signal fires, start the conversation.

YOUR ROLE: HAND OFF THE SIGNAL

You're not chasing the consumer long-term — you're opening the door, then handing the signal to your Realtor and Lender partners. Coach them to act on these behaviors in their own marketing, CRM, and outreach so the lead never goes cold. Use the scripts below as a light first touch, then loop your partner in.

Script 06

Title → Agent

Frequent opens → tip off the Realtor/LO

Hand off when a shared client opens their report 3+ times in a month.

Hey **{Agent Name}** — heads-up: **{Client Name}** has been checking their home digest a lot this month. That's usually a sign they're thinking about their next move.

Might be worth a personal check-in from you — want me to send over what they've been looking at?

Coach your Realtor to fold this into their own outreach and CRM follow-up

Script 07

Title → Realtor

Selling position viewed → refer the Realtor

Hand off when a shared client opens the selling-position module.

Hi **{Realtor Name}** — **{Client Name}** has been modeling what their home would sell for right now. Feels like an early listing signal worth getting ahead of.

You're the first person I thought of — want to reach out while it's warm? I can loop in our title team the moment they're ready.

Position yourself as the Realtor's source of live seller signals

Script 08

Title → Realtor

Purchase potential viewed → alert the Realtor

Hand off when a shared client explores buying power or move-up scenarios.

Hey **{Realtor Name}** — **{Client Name}** is running move-up numbers in Homebot. Could be a good moment to check whether their current place still fits.

Want me to forward the scenario so you can tailor your follow-up?

Keep it short — you're teeing the Realtor up, not closing

Script 09

Title → Lender

Equity interest → flag the lender

Hand off when a shared client's equity shifts noticeably or they explore equity options.

Hi **{LO Name}** — **{Client Name}**'s equity has moved and they've been exploring their options in Homebot. Could be a refi or HELOC conversation for you.

Happy to send the details — and our title team ready whenever a new order comes through.

Strategic, not transactional — you're feeding your LO partner a live lead

Script 10 **OPTIONAL**

Title → Partner

Shared client is engaging

Send when a shared client is spending time on buy or sell scenarios.

Just a heads up — one of our shared clients has been spending time in their Homebot experience, especially around selling/buying scenarios.

Might be a good window for a light touch-base.

Optional — for title teams looping in partners

WINS BY DAY 60

Conversations feel timely, relevant, and natural. Realtor and LO partners are engaged.

CHAPTER 03

Scale & systemize.

Make it repeatable. Make it efficient.

The goal isn't more messages. It's fewer messages that actually move something.

By month three, you've earned the right to **say less.**

The last 30 days are about consolidation. Now turn it into a weekly habit that runs in the background while you focus on the conversations that actually matter.

Three rhythms become permanent in the final phase: a weekly look at the activity feed (the “nudge” handoff to your partners), a value-forward coaching touch that keeps your Realtors and Lenders working engaged-but-not-ready clients, and a thoughtful follow-up every time you sync with a partner.

YOUR DAY-61 TO DAY-90 CADENCE

- ✓ **Weekly:** scan the activity feed, send Script 11 to hand a few live signals to your partners.
- ✓ **Monthly:** send Script 12 to coach a partner on any engaged-but-undecided client.
- ✓ **After every partner sync:** send Script 13 to close the loop.
- ✓ Prime your top preferred pros so they never miss the Partner Opportunity email (Script 05).

THE SHIFT

By Day 90 you're not running 13 scripts a day. You're checking one feed once a week and handing two or three live signals to the partners who turn them into deals.

The rhythm scripts.

Script 11

Title → Realtor

Video

Weekly video-message handoff

Record a quick video for partners whose shared clients show significant report changes — value, equity, or market.

Hey **{Realtor Name}** — shot you a quick video walking through **{Client Name}**'s report. Their numbers moved meaningfully this week, so I wanted you to see exactly what changed.

Feels like a strong reason for you to reach out — happy to send over the details.

A short screen-share video lands harder than text — send it only when the change is significant

Script 12

Title → Partner

Coach the partner on the long game

Hand off when a shared client is engaged but not yet ready to act.

Hi **{Partner Name}** — **{Client Name}** is watching their Homebot closely but isn't ready to move yet. Worth staying top-of-mind with value, not a pitch.

Fold them into your nurture cadence — I'll ping you the moment the signal sharpens.

Help your partner play the patient, value-first long game

Script 13

After a partner sync

Follow-up after a partner sync

Send when you've caught up with a partner on what's happening behind the scenes in Homebot.

Great catching up today, **{Partner Name}** — I always enjoy touching base on what's happening behind the scenes.

Just a reminder: I'm staying close to our shared clients and will keep alerting you automatically anytime a signal, message, or opportunity comes through. You won't miss a thing — let's connect again soon.

Reassures the partner you've got the automated alerts covered

13

That's all thirteen. By now the scripts should feel less like a checklist and more like instinct — the right words, ready when a signal fires.

THE OUTCOME

You're sending fewer messages — and having better conversations.



Fewer, better messages

Each touch lands because it's grounded in real behavior — not in a guess about timing.



Homebot supports your flow

The reports do the watching, so you can focus on responding. It works with your day instead of adding to it.



You're the proactive one

Homeowners and partners see you as the one already paying attention — before they have to ask.

WHAT'S NEXT

Bookmark this playbook. Run it again with every new batch of closings — the rhythm gets easier each time.

KEEP GOING

More plays from the Homebot library.

How to build your weekly call list

Identify engaged homeowners, spark meaningful conversations, and drive more repeat closings and referrals with consistent weekly touch points to the partners included.

[LEARN MORE ↗](#)

Homebot as a conversation starter

Best practices for what to say when you reach out to your homeowners and partners (with or without a phone number).

[LEARN MORE ↗](#)

Partner outreach scripts for title teams

A full library of partner-facing outreach scripts beyond the ones in this playbook.

[LEARN MORE ↗](#)

Supporting partners who want Homebot

How to help Realtor and LO partners who want their own Homebot — what to share and where to point them to get started.

[LEARN MORE ↗](#)

TALK TO US

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