# Partner Intel best practices

Your relationships with real estate agents are one of the most important assets in your business. This playbook shows you how to use Partner Intel to know exactly where those relationships stand — and how to grow them strategically.

4 plays | ~10 min read | Data-backed

WHAT'S INSIDE

**Click any link below to jump ahead.**



START HERE

## Most loan officers are flying blind. Partner Intel isn't.

Partner Intel combines real transaction and listing data with Homebot-specific relationship signals, so you can make data-backed decisions about who to partner with — and see exactly where you're winning or losing business in your market. It gives you a clear view of your agent relationships: the current ones, the prospects, and everything in between.

**01 · Audit your relationships**
See where you're under-leveraged with agents you already know.

**02 · Find new partners**
Target productive agents worth pursuing — with specifics.

**03 · Win the brokerage room**
Walk into a lunch-and-learn knowing every tier in the shop.

**04 · Recruit top talent**
Identify loan officers worth recruiting — and their networks.

### Where to find it

Log in to your account and look for the **Partner Intel** button near the bottom-left of your navigation. One click and you're in.

### Don't see it yet?

If Partner Intel isn't in your account, reach out to our support team at support@homebot.ai — they'll walk you through getting access.

01

CONNECTIONS TAB · WARM NETWORK

## Audit your existing agent relationships

The Connections tab lists every buy-side agent you've done at least one transaction with in the last five years. It's designed to surface where you already have history — and quickly show where you're under-leveraged. You might be surprised by what the data actually shows.

ROOM TO GROW

Your "top partner" — lunch twice a year, five deals closed together. But they closed **40 loans** this year and only **5** came to you.

That might not be a loyal partner. That's a relationship with a lot of room to grow.

INVEST DEEPER

An agent who's only closed **8 deals** this year — but **every single one** came to you.

That's someone who believes in you. Someone worth investing in more deeply.

### How to use it

1. Sort your current partners by **total volume**. This tells you who's active in the market right now.
2. Compare that to the **deals with you** column. The gap between those two numbers is your opportunity.
3. **Big gap** → time to re-engage. **Small gap** → double down and protect that relationship.

**Worth its weight in gold.** This one view alone protects your book of business — you'll spot the loyal partners and the ones quietly sending deals elsewhere.

02

SEARCH VIEW · PROSPECTING

## Find new agent partners worth pursuing

Search agents by name or license number and see their production data instantly: transactions closed in the last 12 months, active listings, how many lenders they work with, and whether they're on Homebot with a lender co-sponsor or not.

### Dig into the profile

Click an agent to see which lenders they work with, their transactions and listings, plus contact info when we have it.

### Heart to follow

Heart an agent and we'll send you listing alerts — a great, timely conversation starter.

### Spot the opening

If an agent is productive but has no co-sponsor, that's an opening. If they're tied to another LO, you'll know that too.

### A prospecting approach

1. Click **Add location** for every city or ZIP code you work in.
2. Narrow with the filters — e.g. agents with **20+ transactions** in the last 12 months who are **on Homebot without a current co-sponsor**.
3. You've found productive agents who are already on Homebot but may be underserved. Now your outreach can lead with something specific.

CONVERSATION STARTER THAT GETS A RESPONSE

*“I noticed you closed 28 transactions in Riverside last year. I specialize in that market, and I think I could be a real asset to your buyers.”*

That beats "let's grab coffee."

NOT YET ON HOMEBOT

*“I use a tool called Homebot that sends my clients monthly home value reports, and it looks like there's a way to co-brand with an agent. I'm looking for someone reliable I can pass some business off to. Do you have 15 minutes to check out the platform?”*

Leads with what's in it for them — referrals — not with a product pitch.

ALREADY ON HOMEBOT

*“I came across your profile while using Partner Intel inside Homebot and noticed you're already on the platform. Adding a lender co-sponsor cuts your cost in half and unlocks additional features. I'm looking for a reliable partner I can pass some business to — is that something you'd be interested in?”*

A no-co-sponsor agent has a concrete reason to say yes: half the cost, more features.

Find a ton more example scripts in the Help Center — the pink icon in the bottom-right corner of your account.

03

BROKERAGES TAB · THE MEETING PREP

## Walk into a brokerage meeting prepared

Got a lunch-and-learn or a shop you're trying to break into? Search brokerages by name or location, then pull one up to see every active agent sorted by total volume over the last 12 months — a quick read on who's a top producer, who's mid-level, and who's newer to the game. Your strategy should be different for each tier.

TOP PRODUCERS

### Compete on service

Likely locked into a lender already. Pitch what nobody else can: turn time, communication style, pre-approval process. Come with specifics — make it easy to say yes.

MID-LEVEL · BEST BET

### Your best opportunity

Established enough to have a real pipeline, but may not have a go-to lender they love yet. This is where the winnable business lives.

NEWER AGENTS

### The long-term play

Show up early — answer questions, educate their buyers, make them look good — and you'll earn loyalty that lasts a career.

### How to use it

1. Open the **Brokerages tab**.
2. Search a brokerage by **name**, or add your **location** and narrow with the filters just below.
3. Select a brokerage, open the **Agent Roster** tab, and sort by **total volume** to see the tiers at a glance.

That's not just preparation — that's showing up like a professional who knows the room before walking in.

04

FOR BRANCH MANAGERS & RECRUITING LOS

## Recruit top lending talent

A use case that doesn't get talked about enough. By looking at transaction data in your area, you can identify loan officers closing significant volume who might be looking for better tools, better support, or a better culture.

### Build a recruitment prospect list

1. Filter by **closed loan volume** in your target geography. Look for LOs consistently closing **5+ deals a month**.
2. Check their **agent connections**. A diverse network of deep, top-producing relationships makes an LO worth recruiting — those relationships often come with them.
3. Have an informed, specific conversation backed by data — not a generic recruiting pitch.

**Watch for concentration risk — and the opening it creates.** An LO doing high volume through just one or two agents is riskier: lose those agents, and the pipeline collapses. But if you can offer tools to diversify their network, that's a compelling reason for them to make a move.

HANDLING PUSHBACK

## Objections you'll actually hear

You've found the right agent and made the ask. Here's how to answer the six things they're most likely to say back.

### "The home value estimates aren't perfect."

It's a starting point, adjustable anytime — and a natural opening for them to step in with a real CMA and show their expertise.

### "My database isn't big enough."

Freemium covers up to 25 clients free. They can start with friends, family and neighbors, or generate leads via a personalized landing page.

Freemium is only possible through a lender.

### "My data is messy and unorganized."

They just send a spreadsheet with the basics — Homebot's data team is there to support.

### "I don't have time to manage my account."

Once their data's in, Homebot runs itself. A weekly check-in is enough, and they can delegate to an assistant via shared credentials.

### "I already have an IDX for buyers — what's the point?"

Homebot provides a branded, safe, nationwide alternative to Zillow with unique filters and best-in-class financial calculators — plus an app so their buyers can take home search on the go.

### "I can't work with just one lender."

Fair enough — co-sponsorship doesn't ask you to drop anyone. Are any of your other go-to lenders already on Homebot and willing to co-sponsor you? It's a great way for us to stay connected throughout the year.

All of these responses come from the Homebot Help Center: *"How do I handle co-sponsorship objections from agents?"*

KEEP GOING

## Additional resources

- Co-sponsorship overview ↗
- Agent outreach scripts ↗
- Agent outreach strategies ↗
- Join our live trainings ↗

THE BIG IDEA

# The loan officers who grow are the most strategic about their relationships.

Not the ones who work the hardest or have the lowest rates. Knowing your numbers, understanding your market, and showing up with data is a mindset you can start practicing today — Partner Intel just makes it effortless.

Book a demo at homebot.ai

Launch Partner Intel now