THE HOMEBOT CUSTOMER PLAYBOOK

90 days to a client relationship that outlasts the closing.

Thirteen plug-and-play scripts, sequenced across three 30-day phases — for real estate agents who turn every closing into a relationship that lists, refers, and comes back.

Made for real estate agents

A LETTER FROM THE TEAM

Most closings are a goodbye. This one isn't.

The relationship shouldn't end when the keys change hands. For most agents, closing day is the last real conversation — the client moves in, life fills up, and by the time they're ready to move again someone else's postcard is on their counter.

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. A home that gained $40,000 in value is a listing conversation. A client modeling a move is a deal you win before it ever hits the market.

This playbook is the rhythm we've watched the best agents 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 clients and referral partners who drive your next listing.

WHAT'S INSIDE

Contents

JUMP AHEAD

Days 1–30
Launch & activate · p. 06

Days 31–60
Engage & identify · p. 11

Days 61–90
Scale & systemize · p. 16

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 agents, the hardest part of staying in touch isn't writing the message. It's knowing when. Reach out too often and it reads like farming. Reach out too rarely and by the time they're ready to move, they've forgotten who sold them the house.

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.

Those signals map directly to your work. A client watching their selling position is a listing six to twelve months early. A client running move-up numbers is a buyer with a house to sell. A client exploring equity is a renovation, a rental, or a second home in the making.

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.

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

Clients understand why they're getting reports. Your loan officer and insurance agents are added as preferred. Nobody's surprised when a report arrives.

60 DAY

Conversations get timely

You respond to real behavior — value jumps, equity moves, selling-position views, frequent opens. Each touch feels natural and unforced.

90 DAY

The system runs itself

Fewer messages, better conversations. Listing conversations start earlier, and clients and partners see you as the one already paying attention.

Pair every week of this arc with your Weekly Leaderboard Email on Monday — that's how you'll spot the engaged clients and partners worth a call.

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 clients don't know why a monthly home report from their real estate agent 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. Your clients trusted you with the biggest transaction of their life, and they need to hear, in your voice, that this report is a long-term gift and not a sales channel.

Three small moves do most of the work: introduce it at closing, send a heads-up the day you add each client, and add your loan officer and insurance agent 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 loan officer and insurance agent partners and send Script 04 so they know what to expect.

WINS BY DAY 30

Clients know why they're getting Homebot and trust the intent. Loan officer and insurance agent partners are added as preferred.

Open the relationship the right way.

Homebot also sends an automated welcome email you can customize. These scripts are meant to complement it, not replace it.

Script 01 OPTIONAL IN PERSON ON THE PHONE

Homebot introduction at the closing table

Send when you finalize the closing with your client.

As a thank-you for closing with me, I've set you up with a tool called Homebot. It tracks your home's value and equity over time — and it's how I'll know when something in your report is worth a conversation.

You'll start receiving a personalized home wealth report from **{{Your Brokerage}}** in the next few days — no cost, no catch.

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

SHOW, DON'T EXPLAIN

Homebot's branded marketing materials include a short client-facing video that walks through what the report actually shows. Send it alongside Script 02 — it saves you the explanation. Get the client video ↗

Script 02 EMAIL TEXT

Client "heads up" — first add

Send within 24 hours of adding a homeowner to Homebot.

Hi {{Client Name}} — quick heads up!

As a thank-you for closing with me, 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 if the numbers move, let me know — I'm always happy to walk through what they actually mean for you.

— {{Your Name}}, {{Your Brokerage}}

From your agent, to your client.

Script 03 EMAIL TEXT

Quiet client — 1 to 2 weeks later

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

Just checking that you're getting the home reports I set up after closing.

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

No pressure, no pitch. You're confirming delivery and offering help.

Script 04 AGENT → PARTNER EMAIL PARTNER OPPORTUNITY

Add a preferred partner — and prime them for opportunities

Send when you add a loan officer or insurance agent 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.

Nothing else to do; just look out for financing questions from {{Client Name}}.

One more thing to watch for: a Partner Opportunity email from Homebot. It flags the exact clients on our shared list showing real buying, selling, or financing signals right now. Star it and reach out the moment it lands so we can jump on those warm leads together.

Referrals run both ways — and a primed partner means the Partner Opportunity email never gets buried.
Learn how to add a preferred partner ↗

Script 05 OPTIONAL AGENT → LENDER EMAIL

Invite a lender co-sponsor

Send when you want to bring on a lender as a co-sponsor.

Hey {{Lender Name}} — I use Homebot to spot early buying and selling signals with clients and homeowners. I'd love to share how it's working for some of my top partners.

Would you have time later this week or early next to connect for 15 minutes?

Optional — for non co-sponsored agents only. How co-sponsorship works ↗

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 — Script 06

Three or more opens in a month means active interest. A good moment to ask whether the report is useful — and to open the door.

2 Selling position viewed — Script 07

The most valuable signal you get. They're modeling what their home would sell for right now — a listing conversation months before it hits the market.

3 Buying power explored — Script 08

They're looking at move-up scenarios. That's a buyer with a house to sell — the best listing lead you'll get all month.

4 Equity options explored — Script 09

A renovation, a consolidation, a HELOC. That's a live lead for your loan officer partner — and a reason to stay in the conversation.

5 Shared client engaged — Script 10

When a shared client is active in their report, loop your loan officer or insurance agent partner in with a short heads-up.

USE YOUR BEST JUDGMENT

A new homeowner checking their selling position probably isn't listing — they're curious about their equity. Think about where someone is in their homeownership journey before you loop a partner in.

How to spot real intent ↗

When the signal fires, start the conversation.

Script 06 AGENT → CLIENT FREQUENT OPENS

High engagement → ask if it's useful

Send when a client opens their report three or more times in a month.

Hey {{Client Name}} — I want to make sure the monthly home report I've been sending is actually useful to you. It tracks your home's value and equity — and it's how I keep an eye on your options between moves.

I value your take on it — and if anything in there raises a question, I'm happy to answer it.

Ask for their opinion, not for their business. The conversation goes where it goes.

Script 07 AGENT → CLIENT LISTING SIGNAL

Selling position viewed → open the door

Send when a client opens the selling-position module, or their value moves noticeably.

You may have noticed your home's value moved in your latest report.

Your market has been shifting, and where your home sits in it has moved with it. If you're ever curious what a sale would actually look like — timing, net proceeds, what it buys you next — I'm happy to walk through it.

No pressure either way. I'd just rather you have the numbers early than late.

This is the signal your whole business runs on. Lead with the information, not the listing agreement.

YOUR ROLE: WORK THE CLIENT, FEED THE PARTNER

When a client starts thinking about moving, you have two jobs: have the conversation yourself, and hand the financing side to your loan officer partner early. Partners who get warm introductions send them back.

Script 08 AGENT → CLIENT

Buying power explored → the move-up conversation

Send when a client explores buying power or move-up scenarios.

Hi {{Client Name}} — I wanted to reach out about the home you're in now. Is it still fitting the way you live?

If you're ever curious what a move up would look like, I can put real numbers on it — what yours would sell for, and what that buys you in today's market. No obligation, just information.

Most move-up sellers don't call an agent first. They quietly run the numbers. Be there when they do.

Script 09 AGENT → LOAN OFFICER

Equity options explored → flag your loan officer

Hand off when a shared client's equity moves, or they explore their equity options.

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

Happy to send the details. If it turns into a renovation or a move-up, we'll both be in early instead of chasing it later.

Keep it short — you're teeing your partner up, not closing for them.

Script 10 AGENT → PARTNER

Shared client engaged → loop the partner in

Send when a shared client is spending real time in their report.

Hi {{Partner Name}} — heads up that {{Client Name}} has been spending time in their Homebot report, especially around buying and selling scenarios.

Might be a good window for a light check-in on your side. Happy to send over what they've been looking at.

Referring on real engagement data shows partners you're helping them generate business, not just asking for referrals.

ONE LINE THAT WORKS FOR ANY CLIENT

"I noticed your market has started to balance out. Let me know if you ever have questions about your neighborhood — or whether it's a good time to sell."

WINS BY DAY 60

Conversations feel timely and natural. You're finding listings before they're listings. Loan officer and insurance agent partners are engaged and sending business back.

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 — turning three months of effort into a weekly habit that runs in the background.

Three rhythms become permanent in this phase: a weekly look at the activity feed, a value-forward touch that keeps engaged-but-not-ready clients warm, and a thoughtful follow-up after every real conversation.

The listing conversation changes too. Instead of calling to ask for business, you're calling about a number they have already seen — and what it means for their next move.

YOUR DAY-61 TO DAY-90 CADENCE

- ✓ Weekly: scan the activity feed and send Script 11 to the two or three clients whose numbers moved.
- ✓ Monthly: send Script 12 to clients who are engaged but haven't asked for anything yet.
- ✓ After every conversation or partner sync: send Script 13 to close the loop.
- ✓ Before every client call: pull up their report so you're talking about their numbers, not your pitch.

THE SHIFT

By Day 90 you're not running 13 scripts a day. You're checking one feed once a week and having two or three conversations that were already warm.

The rhythm scripts.

Script 11 AGENT → CLIENT WEEKLY

The weekly nudge

Send when a client's report shows a meaningful change — value, equity, or market.

Hey {{Client Name}} — quick note because I saw some changes in your home report this week.

Nothing urgent. Just a reminder that I'm here if you ever want a second set of eyes on any of it.

A short screen-share video lands harder than text — worth recording when the change is significant.

Script 12 AGENT → CLIENT MONTHLY

The value-forward touch

Send to clients who are engaged but haven't asked you for anything.

One thing homeowners tell me they like about these reports is seeing their options before they have to make a decision.

Moves work the same way — the good ones start long before a sign goes in the yard. If you ever want help turning the numbers into real next steps, I'm happy to do that.

Patient and value-first. No deadline, no urgency, no pitch.

Script 13 AFTER ANY CONVERSATION

Close the loop

Send after a client call, a market conversation, or a partner sync.

Thanks again for the conversation today.

I'll keep your report updated automatically. If anything changes on your end — plans, timing, a renovation, or just curiosity — let me know and we'll take a look.

— {{Your Name}}, {{Your Brokerage}}

Reassures them that the watching is handled, and that you're the one doing it.

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 or a name on a farm list.

✓ You see it first

You catch the value moves, equity shifts, and move-up scenarios months before anyone puts a sign in the yard.

✓ You're the proactive one

Clients and referral partners see you as the one already paying attention — before they have to ask, and before another agent's postcard shows up.

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 clients, spark meaningful conversations, and drive more referrals with consistent weekly touchpoints.

Learn more ↗

How to use Homebot as a conversation starter

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

Learn more ↗

Lender outreach scripts for agents

A full library of lender-facing outreach scripts beyond the two in this playbook.

Learn more ↗

How co-sponsorship works

The mechanics of bringing on an agent partner — pricing, signup, and what changes.

Learn more ↗

Branded marketing materials

Client-facing video, social graphics, and email assets you can send to show homeowners what the report does.

Learn more ↗

TALK TO US

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Mon–Fri, 9am–5pm MST