



Fall Conference 2023

Leveraging HomeBinder Assistant

Drive repeat business and
generate residual income

HomeBinder Assistant

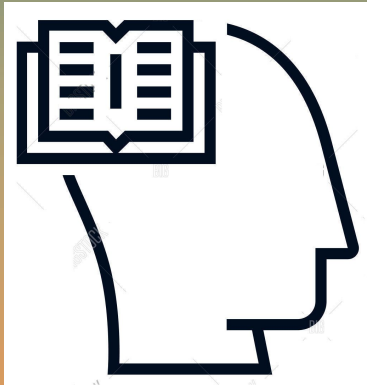
In 3 parts

1. Program Details
2. Addressing Historical Issues
3. Being Successful



The two key (straightforward) Elements:

KNOWLEDGE



COMMUNICATION



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Elements of HBA Success



Communication



Program Details

Part 1



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What's Included in the Package

- **HomeBinder** - A value added product only available through Authorized Providers
- **HomeBinder Assistant (HBA)** - 2 to 4 day post-inspection multipurpose call to follow-up and offer moving services.
- **Repair Pricer (Max)** - Instant cost preview with ability to market that ALL inspections come with cost estimates at no additional cost
- **Revenue Sharing** - Near and long term

\$20+ in Value



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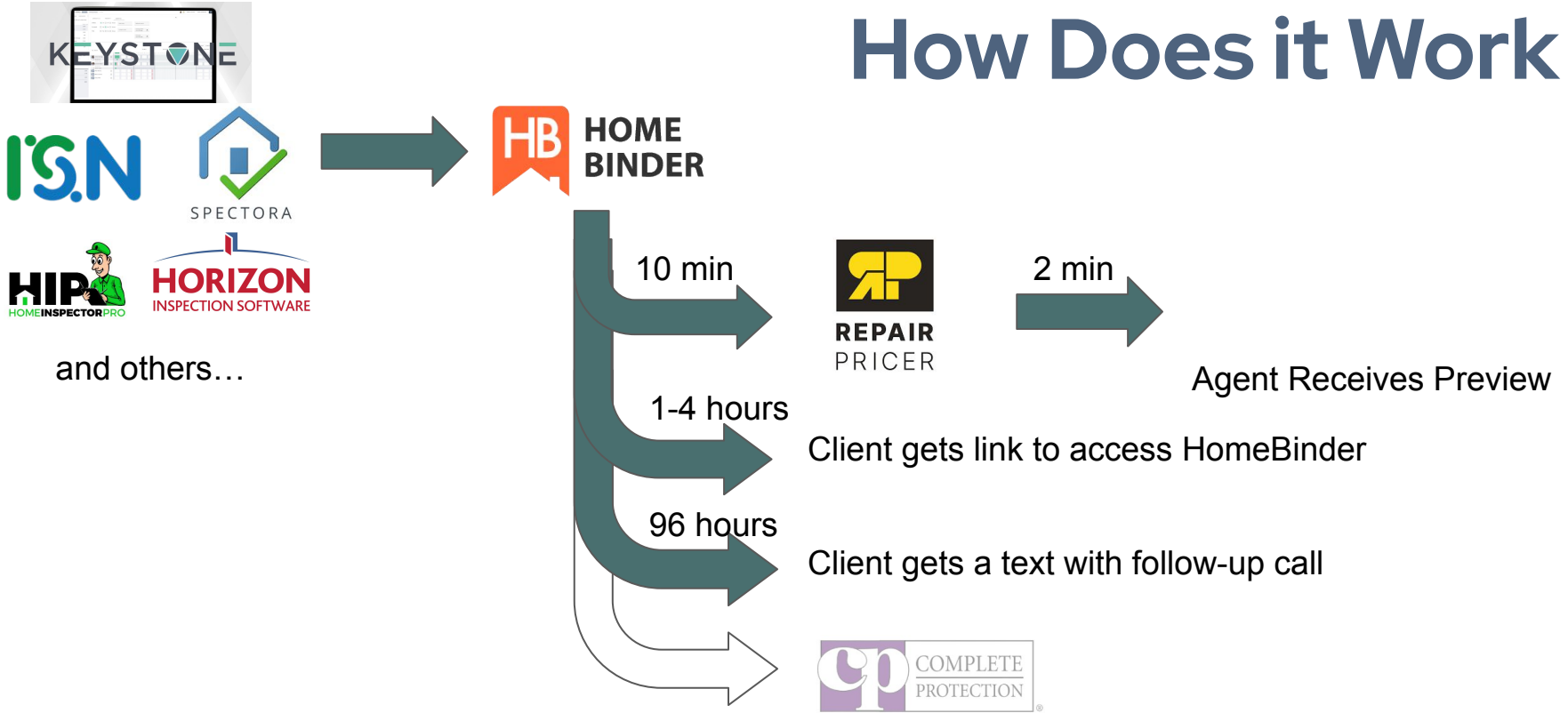
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7 Value Propositions of HBA

1. Giving agents a no cost no hassle lifetime marketing
2. No cost repair cost estimates to your agents/clients
3. QA call to homeowners on your behalf
4. Single POC, easy opt out for buyer clients to prevent complaints
5. QA and marketing call to agents on your behalf
6. More reviews
7. Balanced revenue sharing both near and long term



How Does it Work



The HomeBinder Value

Centralizing Ownership

A Place for Everything

Evergreen "To Do" List

The screenshot displays the HomeBinder web application interface. At the top, the navigation bar includes the HomeBinder logo, the text 'Provided By: Sherwood Inspection Services', and a 'Back to Admin Dashboard' link. A secondary navigation menu contains links for 'Projects', 'Maintenance', 'Home Pros', 'Appliances', 'Docs', 'Pics', 'Property Details', 'Home Finance', and 'MARKETPLACE'. The main content area features a 'Welcome to HomeBinder' message and a 'Things to Do' section with five tasks, each with a 'Do It!' button and a 'Dismiss It' button. On the right, a 'Your HomeBinder is provided by:' section lists service providers: David Sherwood (Sherwood Inspection Services), Linda Toscano (Compass), a Lender, and a Home Insurance Agent. An 'Adaptive Home Value Estimate' of \$389,000.00 is shown at the top right. A large orange bracket on the left side of the page encompasses the 'To Do' list and the service provider section.

HB HOME BINDER Provided By: Sherwood Inspection Services

Back to Admin Dashboard 809 Townsend Ave

Adaptive Home Value Estimate \$389,000.00

Projects Maintenance Home Pros Appliances Docs Pics Property Details Home Finance MARKETPLACE

Welcome to HomeBinder
We are here to help you through your homeownership journey. The "Things to Do" section below is your map to follow to get the most value and peace of mind.

Things to Do
The most important items that need to be completed will be placed here. There will be no more than 5 at a time to make it even easier to stay up to date and manage a healthier home.

View your inspection Report
Your inspector has uploaded your inspection report. To view, click the green button!

Change Utilities
OneSource can help you changing utilities, signing up for TV providers or finding internet or security systems.

Share Binder with Another Person
If you want another person such as a spouse or partner to have access to this same binder, you can add them here.

Update Account Details/Settings
Click to the right to change your name, email or other account settings.

Review and Confirm maintenance schedule
A maintenance schedule has been setup for you. Click here to confirm or adjust it to fit your needs

Andrew Toth Home

Your HomeBinder is provided by:

David Sherwood
Sherwood Inspection Services
HOME INSPECTOR

Linda Toscano
Compass
REAL ESTATE AGENT

LENDER [Add your Lender](#)

HOME INSURANCE AGENT [Add your Home Insurance Agent](#)

The Network Supporting Ownership

Delivering Agents Value through Co-Branding

Value to client

- ❖ Relevant, actionable
- ❖ Educates homeowner
- ❖ Re-connects homeowner with pros

Value to business

- ❖ Nurtures client relationship
- ❖ Open rates 2-3x traditional marketing
- ❖ Branded on 6-8 touches/year

The screenshot shows a reminder email from HomeBinder. At the top right is the HomeBinder logo. The main heading is "Reminder Change HVAC Filter". Below this, a table-like structure shows: "Due Oct 20, Thu", "Occurs Every 6 Months", and "Last Completed Not Completed Yet". A note states: "If your system is used for both heating and cooling you may need to replace filters more frequently." There are two buttons: "Mark Complete" (orange) and "Remind Later" (white with orange border). Below the buttons are two links: "This Doesn't Apply to My Home" and "I Don't Own This Home". A paragraph of text reads: "This reminder is courtesy of Sherwood Inspection Services and Linda Toscano through your subscription to HomeBinder. Nothing has been scheduled, no one is coming to your home, and you have not been billed for anything." Below this are two columns of contact information. The left column features the Sherwood Inspection Services (SIS) logo, which includes the text "OVER 40 YEARS EXPERIENCE", "Home & Commercial Building Inspections", "SIS Since 1982", and "860-646-9983". The contact info for David Sherwood is: "David Sherwood, Sherwood Inspection Services, (860) 646-9983, inspections@sherwoodinspection.com". The right column features a photo of Linda Toscano and the Compass logo. Her contact info is: "Linda Toscano, Compass, (203) 520-7899, ltoscano@pagetaft.com". At the bottom of each column is the text "Thank you for your business!".



Jack Huntress viewing Partner The BrickKicker - Chicagoland

How it works...



Binders

Binders 19071

Every 10 minutes the system looks for new HomeBinders that have been created and sends the report, property and agent details to Repair Pricer servers.



Agents

Marketing

Analytics

Customization

Settings

Extras

Search by binder name, address, state...

Search for a user

Property Address: search by binder group

Photo	ID	Binder Name	Property Address	Creation Date
		Herri Loomes Home	255 Hill Ave, Bartlett, IL	08/29/2023 at 2:01 AM
	1673105	James & Ginger Lanigan Home	302 W St Charles Rd, Lombard, IL	08/29/2023 at 12:40 AM
	1672750	Vibhor Kapoor Home	1706 Fredericksburg Ln, Aurora, IL	08/28/2023 at 10:01 PM
	1672566	Natalie Migawa Home	2775 Sunrise Ln, New Lenox, IL	08/28/2023 at 8:40 PM


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JMC ASSOCIATES
Home Inspection Services

(617) 660-7171
38 Maurice Road
Wellesley, MA 02482

PROPERTY INSPECTION REPORT

THIS INSPECTION IS A DETAILED LISTING OF AREAS VISUALLY INSPECTED AT:
28 Peabody court, Concord Ma



Client: Edwin Phillips, 28 Peabody court, Concord, Ma
Agent: Colwell Banker, Gray Pkwy, (617) 616-7200
Inspector: Doron Bracha, 343
Inspected on Saturday, 14 November 2015 at 09:00 AM.
Your Inspection Order number is 6332

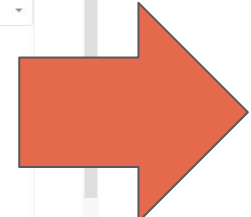
ic

- Property Address
- City
- State
- Zip
- Agent Name
- Agent Email
- Agent Phone
- Inspector Company
- BinderID

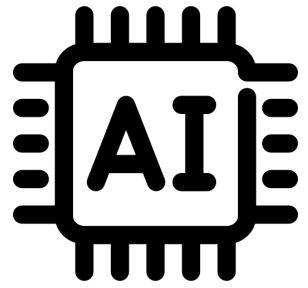
Logout

Binder

02, 2022 - 5:00 PM



REPAIR PRICER



Agent gets Txt and Email within 2-4 minutes

08/24/2023 12:19PM

+17744549396

Dear User, A new Repair Pricer report for 1712 W Morten Ave Phoenix AZ 85021 has been shared with you courtesy of Patterson Property Inspections . Our unique technology turns home inspection reports into accurate repair estimates so that home buyers can make educated decisions during the purchase process. Please check your email to get report preview. If you need any assistance, please email support@repairpricer.com.
Team Repair Pricer

Note: designed for desktop only so no link directly via txt message

Repair Estimate available for 1712 W Morten Ave Phoenix AZ 85021



External



support@repairpricer.com
to me ▾

Thu, Aug 24, 3:19 PM (5 days ago)



Hi Matthew Young,

A new Repair Pricer report for 1712 W Morten Ave Phoenix AZ 85021 has been shared with you courtesy of Patterson Property Inspections .

Our unique technology turns home inspection reports into accurate repair estimates so that home buyers can make educated decisions during the purchase process.

To view the report, please click the link below.

[1712 W Morten Ave Phoenix AZ 85021](#)

If you need any assistance, please email support@repairpricer.com

Team Repair Pricer

Link takes Agent to Issues Summary Page

From there they can see top **areas of concern**, an **estimated price range** and move forward with **ordering** a Repair Pricer Report

REPAIR PRICER

Repair Estimate for :
211 Sojourn Dr North Fort Myers FL 33903

Issues Summary
The top five repair categories identified in the inspection report.
(Note this may not include all potential repair categories)

Category	Issues Identified
Plumber	5
DryWall/Painter	2
Handyman	5
Electrician	2
Roofing Contractor	1
Critical Issues	1

[Order Full Report Now](#)

Disclaimer: This estimate has been prepared using artificial intelligence only and is merely indicative of average costs for similar repairs completed in your area. It has not been reviewed by our professional estimation team and should be used as a guide only.

ESTIMATED
\$6,879

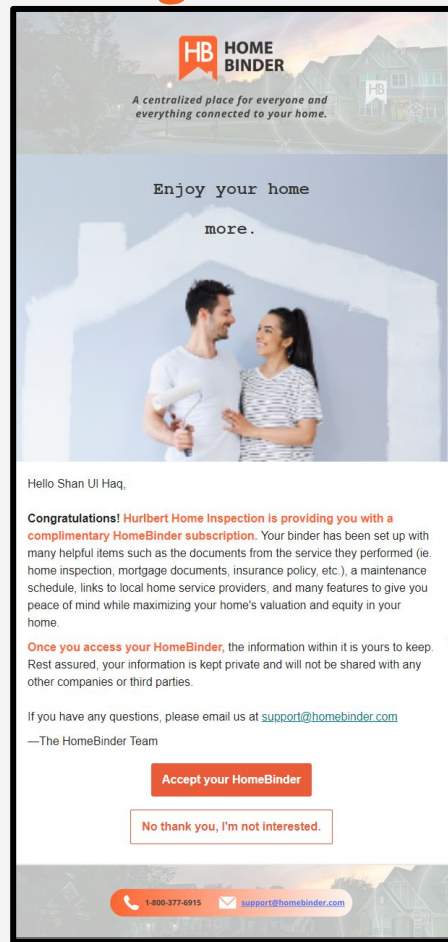
LOW: \$6,497 HIGH: \$7,261

[Order Full Report Now](#)



Homeowner Receives Welcome Message Once Binder Created


***Client receives
email typically
within 1-2 hours.
(setting you choose)***





Emails to Agents:

New Binder Notification Email



Hello Stacie!

Axelrad & Associates Home Inspections has set up **John Price** with a free HomeBinder account with maintenance reminder emails, appliance recall alerts, and more as part of the real estate transaction for 735 Jewel St, New Orleans, LA.


Note From Axelrad & Associates Home Inspections:


We provide all of our clients with a free HomeBinder as part of the real estate transaction.

A primary reason why we've paid for HomeBinder is so that you the agent can stay top of mind with our mutual clients after the transaction.

This branding below will be included in all maintenance reminder emails and will also be included in the client's HomeBinder as the "Agent of Record".

Click the button below to confirm/edit your contact information that will be viewable by your clients. You can update your information at any time.






Stacie Carubba
stacie@staciecarubba.com
(504) 434-7653

****You can now also add a list of preferred home servicer providers in your local area that will be included in your client's HomeBinder account for home maintenance, improvement projects, and unexpected repairs.**

[Access my Account!](#)

Note: You will not be able to get a copy of the inspection report through HomeBinder as each binder is private to the client. Please contact the client or the Home Inspector directly to get a copy.

Monthly Summary



Monthly Summary for Jennifer Raby

Here's your monthly update, in terms of key touchpoints, from the HomeBinder accounts you've been added to by **John P Brooks of Lee County Inspection Services Home Inspections**

4

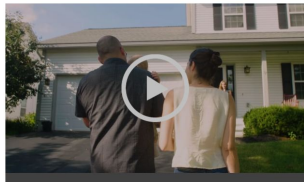
of binders set up for your clients

44


of annual reminders that will be sent

61

of maintenance reminders already sent with your branding



SAVE TIME! Reduce the amount of time you spend sharing your local recommendations. Add all of your home pros (HVAC techs, handymen, plumbers, etc) to your account for your clients to access.



RE/MAX
Trend

KEEP YOUR BRAND STRONG! Ensure your profile is current (logo, picture, etc) within your account settings at any time.

Jennifer Raby

(239) 503-1763
jrealtorjen@gmail.com

[Update My Account Now](#)

96 Hour Call - (As the inspection firm)

- Vetting the contact information (no agents, people not buying)
- Get feedback from inspection and direct your way
- Make sure they got HB link and know what HB is all about
- Confirming purchase and move timeline
- Asking if they would like help in moving services and if so what time would be good to setup a call
- Asking for a review and sending them a link



Fixing Issues with Concierge...

Part 2



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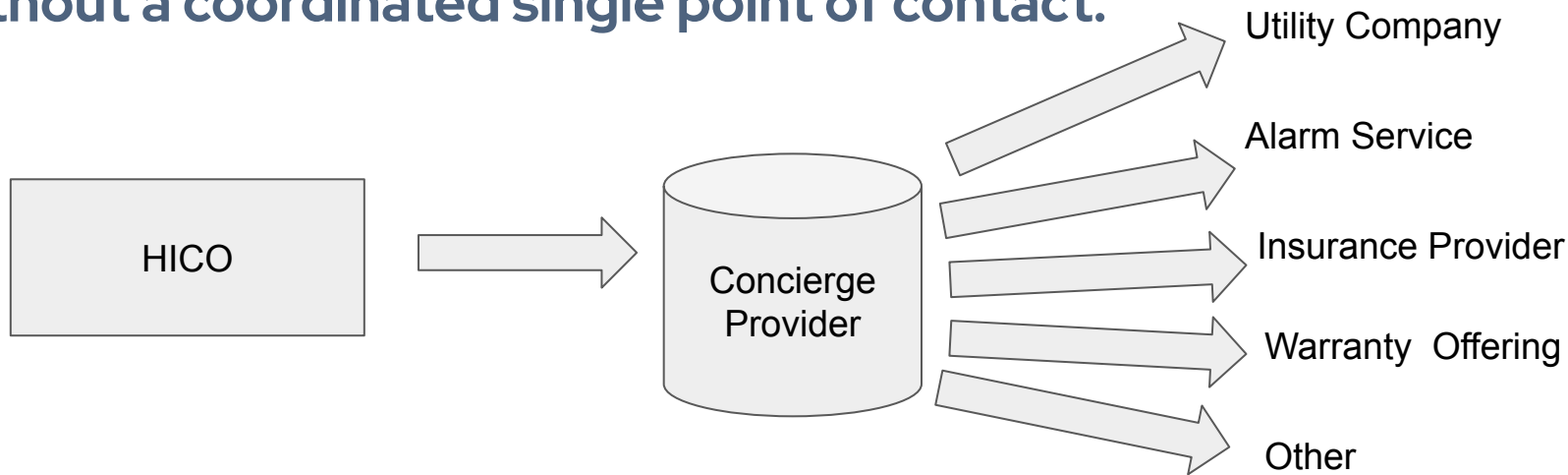
Historical issues with “Concierge”

1. Complaints from Buyers/Clients and Agents
2. Lack of Transparency
3. Imbalance in Program



Why Complaints: Data Propagated

Data was shared with multiple vendors upon turning on the service without a coordinated single point of contact.



Why complaints: Opt-out Hellish

Ability to stop calls/emails/texts very difficult because no easy "one click" opt out process.



Text



Email



Phone

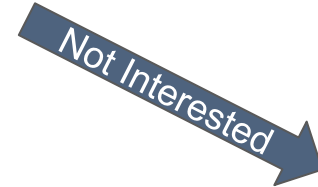


Fix: Single Point of Contact

Start process with a 72 hour post inspection call that creates a gate.



Set call for fixed time and date to review those services of interest.



End of outreach

Any action opts out: VM, Email, Text, Phone
2-3 outreach attempts TOTAL...then stop



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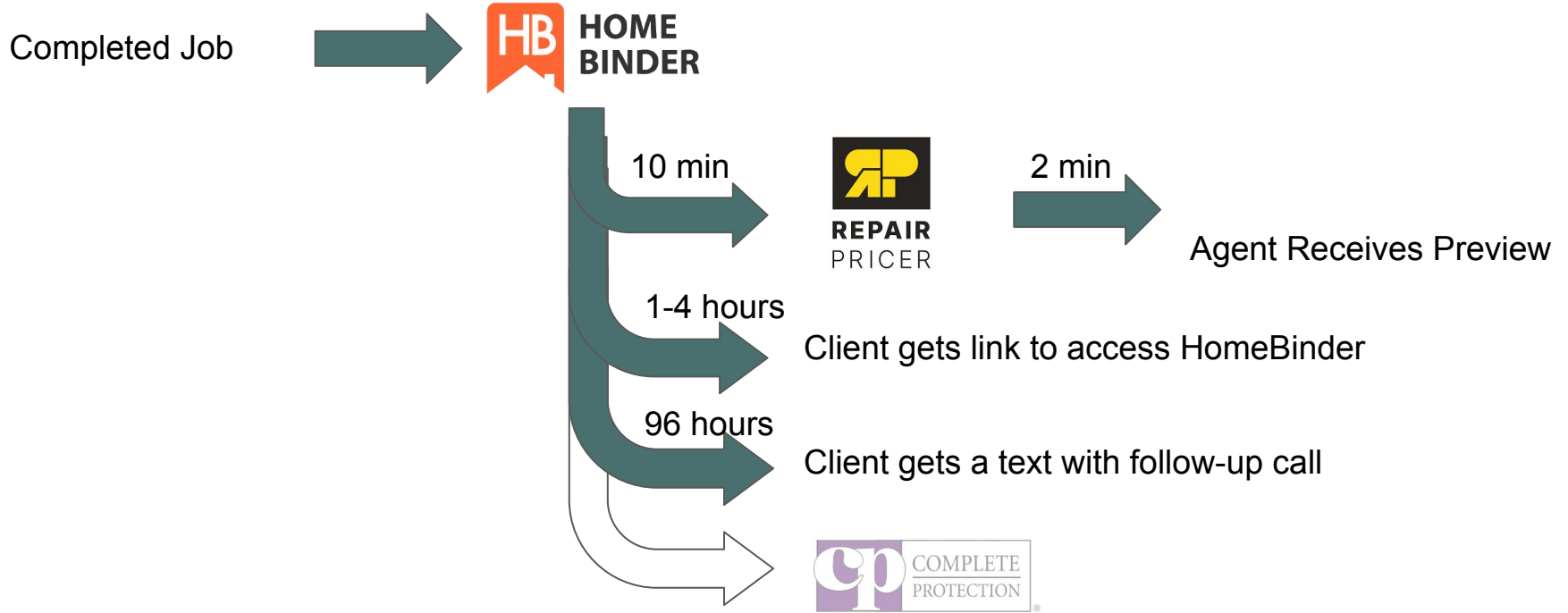
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Issue: Opaque.

No idea about what is happening with clients because of disconnected systems or desire to obfuscate.



Fix: Single Integrated Solution



Fix: Improve Financial Benefit

View service as generating revenue off backs of work without sharing in revenue generated.



Now



Later



PLUS: Bring Tangible Value!

Leverage the opportunity to ensure best outcome for the long term.



Call team acts as your front office.

More than just “a moving concierge”:

- Do you have any questions, concerns or feedback?
- Do you know about HomeBinder and did you get access to your account?
- Could we help you with any of the following...?
- Would this time be best for you?
- If you haven't could you leave us a review (send them link)



How to Maximize

Part 3



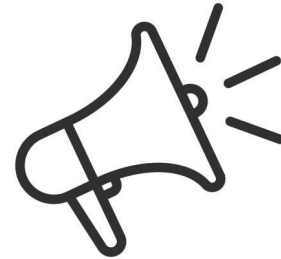
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Elements of HBA Success



Knowledge



Communication



Communication

- **Agents** - Letting them know what you are doing and why you are doing it at all opportunities from emails, to office visits to 1:1s.
- **Clients** - From the booking call through the driveway speech making sure they are aware this is an offering and will happen.



8 Key SWF Marketing Strategies

1. **Agent Office Visits**
2. Maximize the Client Care Team
3. **Build Inspectors into Front-Line Marketers**
4. **Leverage the Moment of Report Delivery**
5. Email Campaigns to Agents (HB, Flex Fund, RP, Warranties...)
6. **Sponsoring Associations (GRI, Women's Groups)**
7. Digital/Social Marketing - Done by 3rd Party
8. Continuum of Client Care to Inspector to Marketing



Agent Office Visits

- In person for a **BUSINESS** meeting (so all agents attend and get most visibility)
- Establish relationship with front desk/office manager (most top-of-mind for future inspection needs)
- Leaving both information and getting a list of agents (often a result of sponsoring business meeting) for CRM/email
- HomeBinder, HomeBinder Assistant and Repair Pricer are focus



Leveraging the Moment of Delivery

- Open door for a call at the moment of report delivery for both agent and client by putting client directly in touch with inspector (again)
- By phone, email, txt and in person work to keep door open for dialogue.
- Use chance to remind client (and agent) of HomeBinder Assistant and Repair Pricer



Sponsoring Associations

- Top performing: Woman Counselor Realtors Association, County Based Realtors Association, Ethnic based Assoc.
- Develop a relationship with event manager or class coordinator
- Be very selective in which classes high performing agents (10-15+) will attend
- Spend time with the agents that will lead to Business meetings in Brokerage offices



Turning Inspectors into Marketers

- 95% of inspectors have been with us over 10 years
- Hire well and nurture the culture of growing the business
- Ensure inspectors feel valued and benefit from the business
- All inspectors are informing agent and client of additional value services around HBA (and this started with Client Care team!)
- Track the input and output of marketing with weekly reporting which creates a fundamental “marketing culture”



5 Key Takeaways



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5 Key Points to be successful with HBA

1. When talking to **Agents**, the focus is **HomeBinder and RP**, not HBA
2. When talking to **Buyer**, the focus is about **HomeBinder Assistant**
3. **Simplify the message to benefit of all!**
4. **Leverage your front line inspectors about two things:**
 - a. What HomeBinder is (30 second description)
 - b. "My team will be calling you to collect feedback on how I did today. Please make sure to look out for that call!"
5. Ensure continuity from **Client Care to Inspection to Marketing**



Thank you!

jack@homebinder.com

janai@swfhomeinspections.com



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