



SHOW UP. SHARE DATA. START CONVERSATIONS.

The Lunch-and-Learn Playbook

How to Host Presentations for Realtor Offices
& Referral Partner Groups

www.firsthomeiq.com

Why Lunch-and-Learns Work

A lunch-and-learn is one of the most effective ways to position yourself as an expert, build referral relationships, and grow your pipeline — all in under an hour. You bring a short educational presentation to a Realtor office, lending team, financial planning group, or any referral partner team. They get valuable data and insights. You get face time, credibility, and warm introductions.

As a FirstHome IQ Ambassador, you have something most professionals don't: original research. The NextGen Homebuyer Report is packed with data about what today's buyers actually think, fear, and misunderstand about money and homeownership. That's the kind of content that gets people leaning in.

What You'll Present

Your go-to presentation is the NextGen Homebuyer Lunch-and-Learn Deck, released specifically for Ambassadors. It's built around the NextGen Homebuyer Report and designed to be presented in 20-30 minutes.

- **NextGen Homebuyer Lunch-and-Learn Deck** — Research-driven insights on NextGen homebuyers, their financial literacy gaps, trust levels, and what they need from professionals like you. Opens with data, transitions to how FirstHome IQ helps, and ends with the quiz. Best for Realtor offices, lending teams, and industry groups.

PRO TIP

Many ambassadors open with 10 minutes of NextGen data to hook the room, then transition into how FirstHome IQ works and how attendees can get involved. Let the data do the heavy lifting and the quiz close the loop.

The Data That Fills the Room

Your secret weapon is the NextGen Homebuyer Report. Here are the stats that consistently get the strongest reactions from audiences. Use these throughout your presentation and marketing:

82%

of NextGen homebuyers say they were never taught financial literacy in school

1 in 3

homebuyers feel overwhelmed by the financial side of buying a home

54%

of NextGen homebuyers don't know how much they need for a down payment

73%

say they trust a lender more if they offer free financial education

67%

of NextGen buyers would choose a professional who helps them learn over one who just sells

These numbers tell a clear story: buyers are underprepared, they know it, and they're looking for professionals who educate — not just sell. When you walk into a room with this data, you're not pitching. You're presenting a solution to a problem everyone in the room sees every day.

REAL RESULTS

Ambassador Michael Creed presented FirstHome IQ and NextGen homebuyer trends to a group of potential partners including agents and advisors. Out of 51 attending, 48 completed the quiz and submitted their emails. That's a 94% conversion rate from a single lunch-and-learn.

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BOOK THE ROOM

The hardest part of a lunch-and-learn isn't the presentation — it's getting on the calendar. Here's how to make the ask easy and compelling.

Who to Approach

- **Realtor offices** — Team meetings, weekly sales meetings, or office-wide training sessions
- **Lending teams** — Branch meetings, regional huddles, or new-hire onboarding sessions
- **Financial advisors** — Firms that serve first-time buyers or young professionals
- **Title companies** — Lunch-and-learns during closings or team training days
- **Insurance agencies** — Teams that cross-sell to homebuyers
- **Community organizations** — Nonprofits, chambers of commerce, or young professional groups

How to Make the Ask

Keep it short and lead with value. You're not asking for a favor — you're offering something their team will benefit from. Here are scripts you can copy and customize:

EMAIL SCRIPT: REALTOR OFFICE

Subject: Quick Lunch-and-Learn for Your Team? (Free + 30 Min)

Hi [Name],

I partner with FirstHome IQ, a nonprofit focused on financial literacy for NextGen homebuyers. We recently published the NextGen Homebuyer Report with some eye-opening data on what today's buyers actually know (and don't know) about money and homeownership.

I'd love to share a 20-30 minute presentation with your team — no pitch, just research and practical takeaways your agents can use in conversations with buyers right away.

Would your next team meeting have room for a quick session? I'll bring lunch.

*Best,
[Your Name]*

EMAIL SCRIPT: REFERRAL PARTNER GROUP

Subject: Want to Bring a Free Training to Your Next Meeting?

Hi [Name],

I'm an Ambassador with FirstHome IQ, a nonprofit that helps NextGen homebuyers build financial confidence before they buy. We've done some original research on what today's buyers are thinking and feeling about money, credit, and homeownership — and the numbers are pretty surprising.

I'd love to present the highlights to your group. It's a 20-30 minute session with real data your team can use. No pitch, no selling — just education.

Would it work to add me to your next team meeting or event? Happy to provide lunch or coffee.

*Thanks,
[Your Name]*

TIMING TIP

Most offices schedule team meetings on Tuesday, Wednesday, or Thursday mornings. Ask about their regular meeting schedule and offer to fill an open slot — it's easier to get added to an existing meeting than to create a new one.

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PREPARE YOUR PRESENTATION

You don't need to build a presentation from scratch. FirstHome IQ has done the heavy lifting. Your job is to know the key talking points and make it your own.

Choose Your Deck

Log in to your Ambassador Portal to access the latest version of the deck:

- **NextGen Homebuyer Lunch-and-Learn Deck** — Data-driven. Opens with research from the NextGen Homebuyer Report, transitions to how FHIQ helps, and ends with the quiz. Designed specifically for Ambassadors to present to Realtor offices and referral partner groups.

Know Your 5 Key Talking Points

Build your presentation around these five themes:

1. **The Knowledge Gap** — 82% of NextGen buyers were never taught financial literacy. This isn't a lack of motivation — it's a lack of access.
2. **The Trust Factor** — 73% of buyers trust professionals more when they offer free education. Leading with education builds the relationship before the transaction.
3. **The Overwhelm Problem** — 1 in 3 buyers feel overwhelmed by the financial side. Your role is to simplify the path.
4. **The Quiz as a Tool** — The FirstHome IQ quiz gives buyers a personalized score and gives you a warm, educated lead. It's the bridge between education and action.
5. **The Competitive Advantage** — Partnering with a nonprofit sets you apart. 67% of buyers prefer a professional who helps them learn, not just sell.

Suggested Presentation Flow (25-30 Minutes)

TIME	SECTION	WHAT TO COVER
0-2 min	Welcome & Your Story	Introduce yourself and share why you became an Ambassador
3-8 min	The Data	Walk through 3-4 key stats from the NextGen Report
9-15 min	The Problem	Explain the financial literacy gap and what buyers are experiencing
16-20 min	The Solution	Introduce FirstHome IQ, the quiz, and the Ambassador

		model
21-25 min	Live Quiz Demo	Walk the room through the quiz in real time — or have them take it on their phones
26-30 min	Q&A + Next Steps	Answer questions, share your quiz link, and invite follow-up conversations

KEEP IT SHORT

The best lunch-and-learns are under 30 minutes including Q&A. Respect people's time and they'll invite you back. You can always go deeper in follow-up conversations.

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DELIVER WITH CONFIDENCE

You don't need to be a professional speaker. You just need to be genuine, prepared, and focused on value. Here's how to make sure your session lands.

Before You Walk In

- **Test your tech** — Make sure your laptop connects to their screen or projector. Bring an HDMI adapter just in case.
- **Print handouts** — Bring a few printed copies of the NextGen Report highlights or your quiz QR code for people who want something physical.
- **Bring food** — If you offered lunch, keep it simple: sandwiches, pizza, or boxed lunches. Don't let catering logistics distract from your message.
- **Arrive 10-15 minutes early** — Set up, test the screen, get comfortable in the space.

During the Presentation

Open With Your Story

Start with why you became a FirstHome IQ Ambassador. Keep it to 60-90 seconds. Your personal connection to the mission makes the data feel real.

OPENING SCRIPT:

"Before I jump into the research, let me tell you why I'm here. I've been in [industry] for [X years], and I kept seeing the same thing — buyers who wanted to own a home but didn't have the financial foundation to get there. When I found FirstHome IQ, it clicked. There was finally a way to help people get educated before they get into the transaction. That's why I became an Ambassador, and that's what I want to share with you today."

Lead With Data, Not a Pitch

The data does the selling for you. Share 3-4 stats from the NextGen Report and let the room react. Ask questions like:

- "Does this match what you're seeing with your clients?"
- "How many of your buyers come in not knowing what they can actually afford?"
- "What would it mean for your business if your clients were more financially prepared before they started looking?"

These questions turn a presentation into a conversation — and conversations create partnerships.

End With the Quiz Demo

The quiz is your closer. Pull it up on screen and walk the room through it, or better yet, have everyone take it live on their phones. This is the moment where the data becomes personal.

QUIZ DEMO SCRIPT:

“Now I want to show you the tool that ties all of this together. The FirstHome IQ quiz takes about 3 minutes and gives buyers a personalized readiness score based on their financial knowledge. Here’s the best part — when someone takes the quiz through your link, you get their results and contact information. It’s the easiest warm lead you’ll ever get, and the buyer actually learns something in the process. Let’s take it together right now — pull out your phones.”

ENGAGEMENT TIP

If the room has 10+ people, do the live quiz. The energy in the room shifts when everyone is taking it at the same time — people start comparing scores, laughing, and asking questions. That engagement is what makes them remember you.

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FOLLOW UP & CONVERT

The presentation gets you in the room. The follow-up is what builds the relationship. Send a thank-you within 24 hours, share resources, and keep the conversation going.

Same-Day Follow-Up

Send a brief email to the person who organized the session, plus anyone you connected with individually:

FOLLOW-UP EMAIL: TO THE HOST

Subject: Thanks for Having Me Today!

Hi [Name],

Thank you for letting me present to your team today — I really enjoyed the conversation. A few quick things:

- *Here's my quiz link your team can share with clients: [Your Quiz Link]*
- *I've attached a summary of the NextGen Report highlights we covered*
- *If anyone on your team wants to learn more about the Ambassador program, I'm happy to chat*

Would love to stay connected. Let me know if there's ever anything I can do for you or your team.

*Best,
[Your Name]*

FOLLOW-UP EMAIL: TO INDIVIDUAL CONNECTIONS

Subject: Great Connecting Today

Hi [Name],

It was great meeting you at today's session. I noticed you were really engaged during the [quiz demo / data section] and wanted to follow up.

Here's my quiz link if you'd like to share it with any clients: [Your Quiz Link]

If you're interested in learning more about becoming a FirstHome IQ Ambassador yourself, I'd be happy to walk you through it. Either way, let's stay in touch!

*Best,
[Your Name]*

Within One Week

- **Connect on LinkedIn** — Add everyone you met with a personalized note referencing the lunch-and-learn.
- **Share a resource** — Send a relevant article, stat, or FHIQ social post to keep the conversation alive.
- **Ask for introductions** — If the session went well, ask the host: “Do you know any other offices or groups that might benefit from this presentation?”

Ongoing Relationship Building

A single lunch-and-learn can generate referral partnerships that last years. Here's how to keep the momentum going:

- Send a monthly email with one interesting stat or FHIQ update
- Share their listings or content on social media (reciprocity matters)
- Offer to do a follow-up session in 3-6 months with new data or a deeper topic
- Invite them to co-host a community workshop or homebuyer event

THE LONG GAME

Don't measure success by how many business cards you collect. Measure it by how many follow-up conversations you have in the week after. One great referral partner is worth more than 50 handshakes.

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GET ORGANIZED

Use these checklists to make sure every lunch-and-learn runs smoothly from start to finish.

ONE WEEK BEFORE

- ☐ Confirm date, time, and location with the host
- ☐ Ask how many people will attend (plan food accordingly)
- ☐ Ask about A/V setup: projector, screen, HDMI or wireless?
- ☐ Download the latest deck from your Ambassador Portal
- ☐ Customize the opening slides with your name and contact info
- ☐ Order food if you're providing lunch (keep it simple)

DAY BEFORE

- ☐ Review your 5 key talking points
- ☐ Practice your opening story (60-90 seconds)
- ☐ Test your quiz link to make sure it works
- ☐ Print handouts: NextGen highlights + QR code for the quiz
- ☐ Charge your laptop and pack your adapter/cables

DAY OF

- ☐ Arrive 10-15 minutes early
- ☐ Set up your laptop and test the projector/screen
- ☐ Place handouts and your business cards at each seat
- ☐ Keep your phone on Do Not Disturb during the presentation
- ☐ Have your quiz link ready to display on screen for the live demo

AFTER THE SESSION

- ☐ Send thank-you email to the host within 24 hours
- ☐ Send individual follow-up emails to key connections
- ☐ Connect with attendees on LinkedIn
- ☐ Ask the host for introductions to other offices or groups
- ☐ Share a post on social media about the experience
- ☐ Schedule a follow-up session in 3-6 months

Go Fill the Room

You don't need a perfect pitch. You don't need a hundred slides. You need one good room, one strong data point, and a genuine desire to help people understand money better. That's what makes a great lunch-and-learn — and that's exactly what you're equipped to deliver as a FirstHome IQ Ambassador.

Start by reaching out to one Realtor office or one referral partner this week. Use the scripts in this playbook to make the ask. The data will do the heavy lifting, and the quiz will close the loop. All you have to do is show up and share what you know.

And when 48 out of 51 people in the room take the quiz? You'll know exactly why this works.



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