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The Mortgage Industry's Best-Kept Secret? Referrals Drive 60% of Business.



In The Mortgage Industry, Referrals Drive 60% Of Business.

As a mortgage brokerage owner, you know the importance of new business—but did you know that 60% of mortgage deals come from past clients and referrals? Despite this, many brokerages focus solely on cold leads while neglecting their most valuable asset: their existing clients.

Every Past Client Represents Untapped Referral Potential

Every past client represents untapped referral potential, but if you're not staying in touch, you're losing business to competitors who are.

The question is: Are you leaving revenue on the table, or are you leveraging your database for explosive growth?

1

Untapped Potential

Past clients are a valuable asset for referrals

2

Staying In Touch

Crucial for maintaining client relationships

3

Competitive Edge

Leveraging your database can lead to explosive growth

The Tale of Two Brokerages: Who Wins the Referral Game?

Let's take a look at **Aloft Mortgages** and **Bayview Lending***
—two firms that started at the same place:

- **5,000 clients** in their database
- **600 new loans** closed annually
- **Similar market conditions**

But their approach to past clients made all the difference:

	Uses BrokerBot	Referral Rate	Repeat Business	Additional Loans Closed
Aloft Mortgages*	✔ Yes	82%	40% (Higher Retention)	1,600 loans closed
Bayview Mortgages*	✘ No	50%	20% (Lower Retention)	1,200 loans closed

The result? Aloft Mortgages closed
400 more deals—on autopilot.

*Brokerage names anonymized for privacy purposes..

The BrokerBot Advantage: Automating Engagement, Boosting Revenue

Aloft Mortgages harnessed BrokerBot's AI-driven engagement tools to turn past clients into a referral-generating machine. Here's how they effortlessly outperformed Bayview:

Automated Monthly Home Valuation Updates

Keeping clients informed about their home's worth and reinforcing your expertise.

Equity Tracking Alerts

Showing homeowners their financial position and creating opportunities for mortgage conversations.

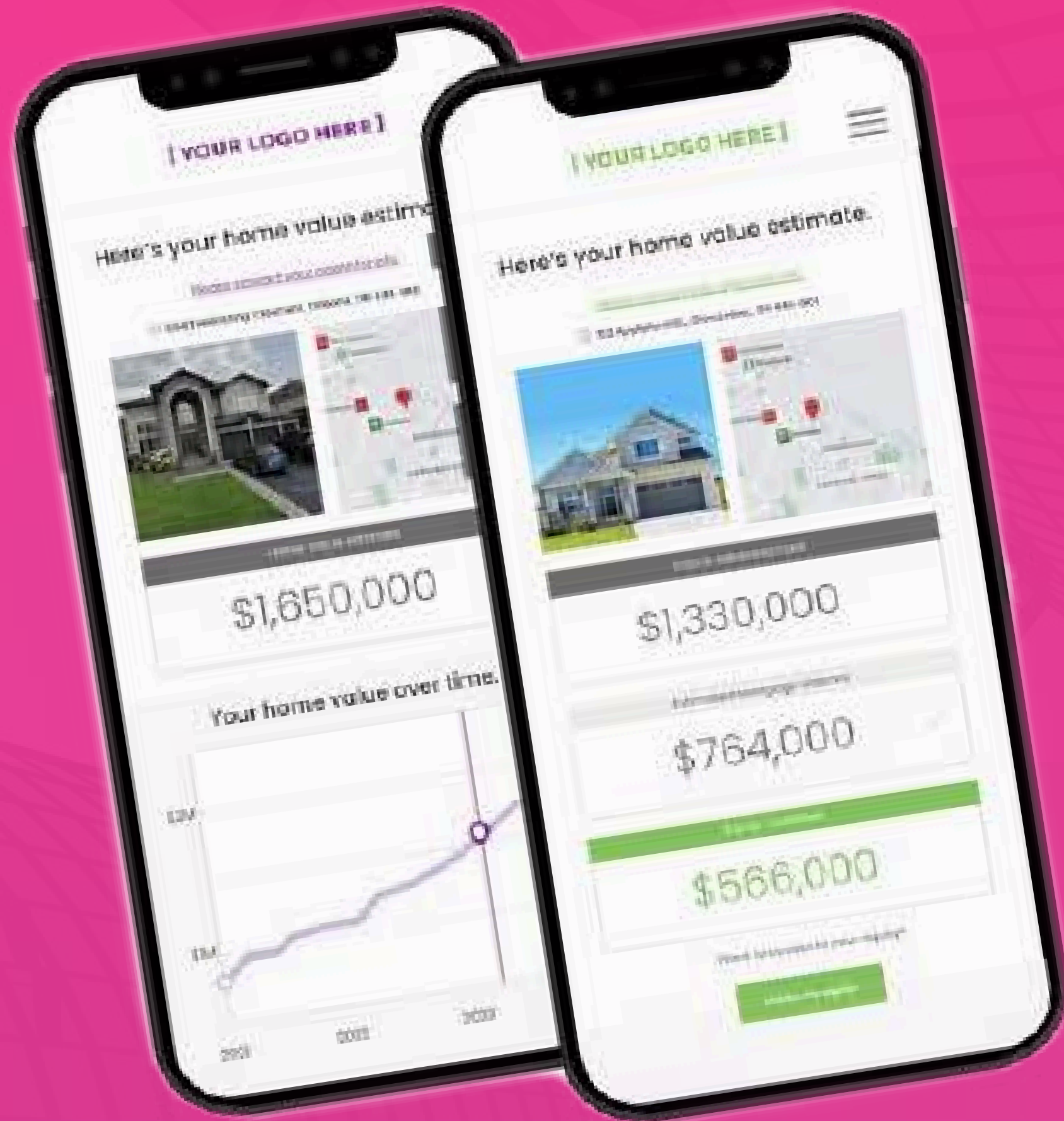
Personalized Market Insights

Delivering hyper-relevant information, proving you're their trusted advisor

One-Click Referral Tools

Making it seamless for happy clients to refer friends and family.

Meanwhile, Bayview stuck to outdated marketing tactics—sporadic outreach, generic newsletters, and zero automation. The result? Lost clients, lost referrals, and lost revenue.



The Revenue Impact: The \$2.3 Million Difference

At an average commission of \$5,784 per loan, those extra 400 loans brought Aloft Mortgages an astounding \$2.3 million in additional revenue. And Bayview? They left that same \$2.3 million in untapped potential, simply by failing to stay top-of-mind with their past clients.

\$5784

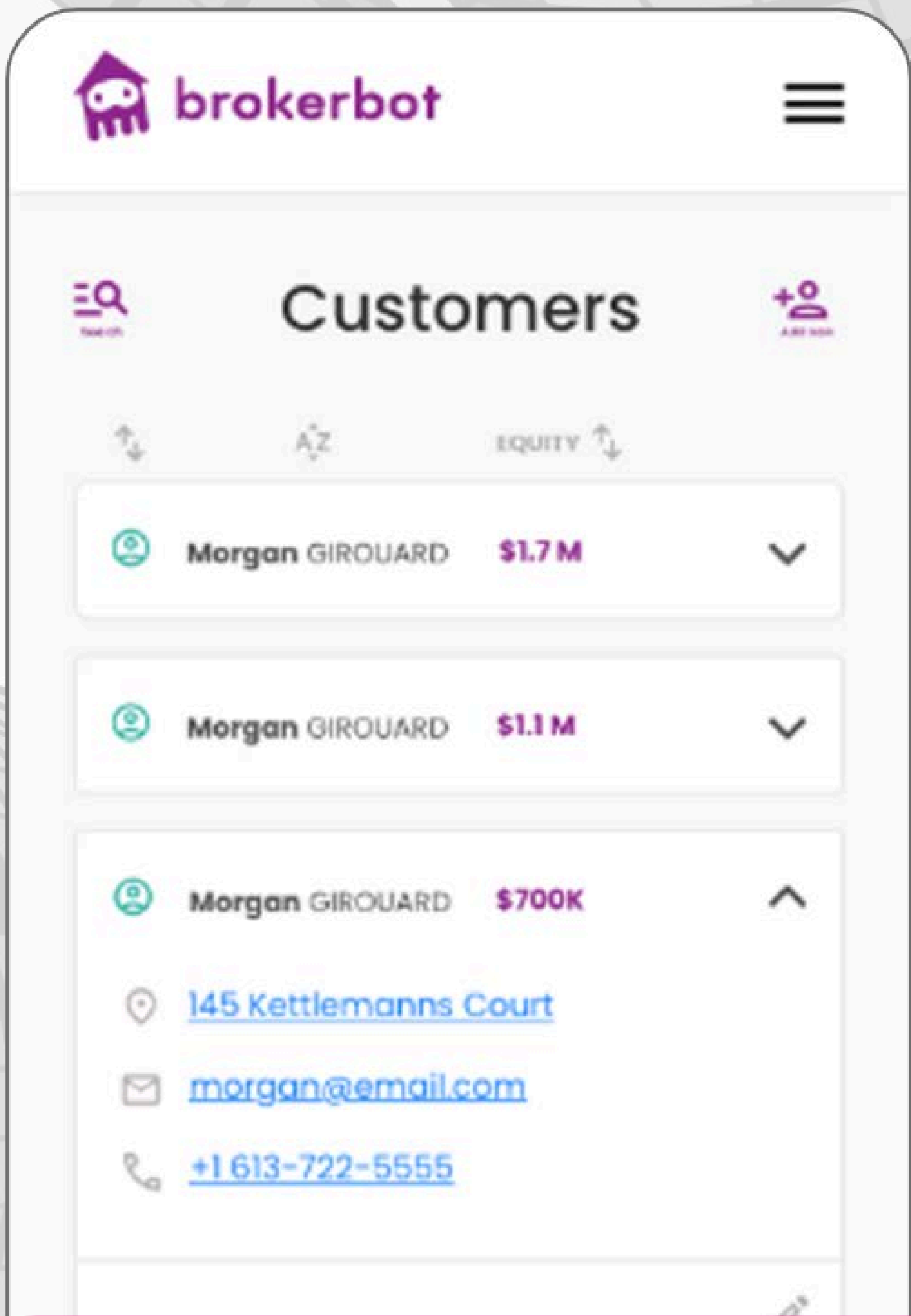
Average Commission
Per Loan

400

Extra Loans
Closed by Aloft Mortgages

\$2.3M

Additional Revenue
Generated by Aloft Mortgages



The Winning Formula for Referral Success

If you want to dominate the referral game, you need a proven system for client engagement. BrokerBot makes it easy:



Automate Client Engagement

Keep in touch with past clients without lifting a finger.



Personalized Home Value Updates

82% of homeowners want them, and they build trust.



Make Referrals Frictionless

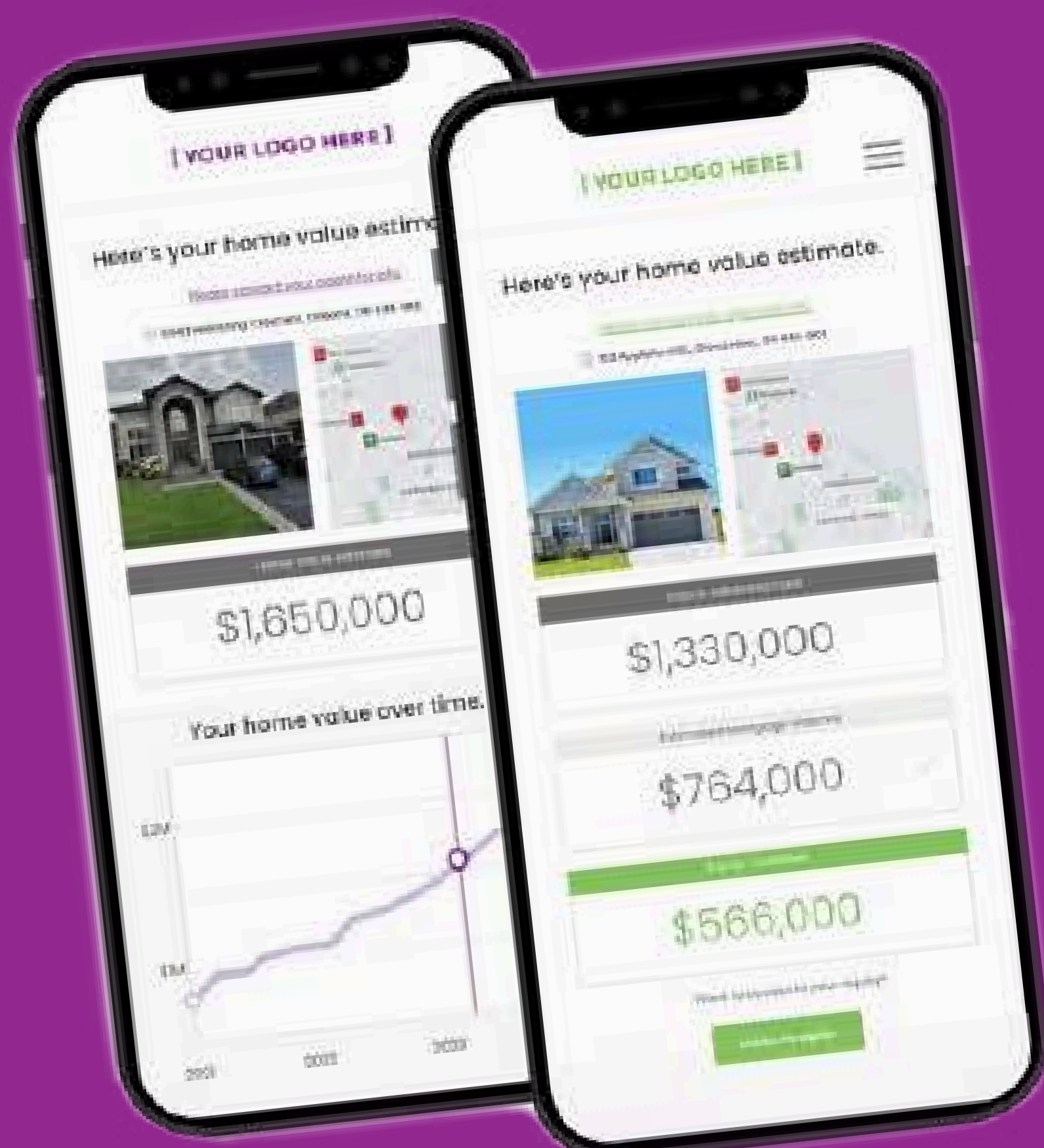
Timely reminders and easy sharing tools turn happy clients into referral partners.

The Bottom Line: Own Your Referrals or Lose Them.

In today's ultra-competitive mortgage market, you're either winning repeat business and referrals, or watching them go to someone else.

Don't let another deal slip away.

Take control of your client database, automate engagement, and turn relationships into revenue with BrokerBot.



 **Start Your Free Demo Today**

Start capturing more referrals, more repeat business,
and more revenue—on autopilot.

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