



brokerbot
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One Brokerage's \$4.6M Question: Are We Losing Clients Without Even Knowing It?

How One Mortgage Brokerage Unlocked
Hidden Revenue with BrokerBot



If you're like most mortgage brokerages, you work hard to bring in new clients—only to watch them slip away when it's time for their next loan.

It's not that they're unhappy with your service. They just forget about you.

The Challenge of Client Retention

68% of past clients don't return simply because they weren't nurtured.



Meanwhile, research shows that **33% of customers** stay loyal when engaged with **personalized email marketing**. So, what happens when you turn client retention into an automated system? The results speak for themselves.

The Case of Two Brokerages

Meet **Aloft Mortgages** and **Bayview Lending***. Both firms started with about **5000 clients** on their books. Both bring in **600 new clients** annually and see their past clients refinance or buy a new home every **seven years**.

But there's one crucial difference:

- Aloft automated client engagement with BrokerBot—sending personalized home valuation updates, market insights, and equity tracking to stay top-of-mind.
- Bayview stuck with traditional marketing and only reached out occasionally before coming to BrokerBot.

The outcomes were telling.

Comparing Outcomes

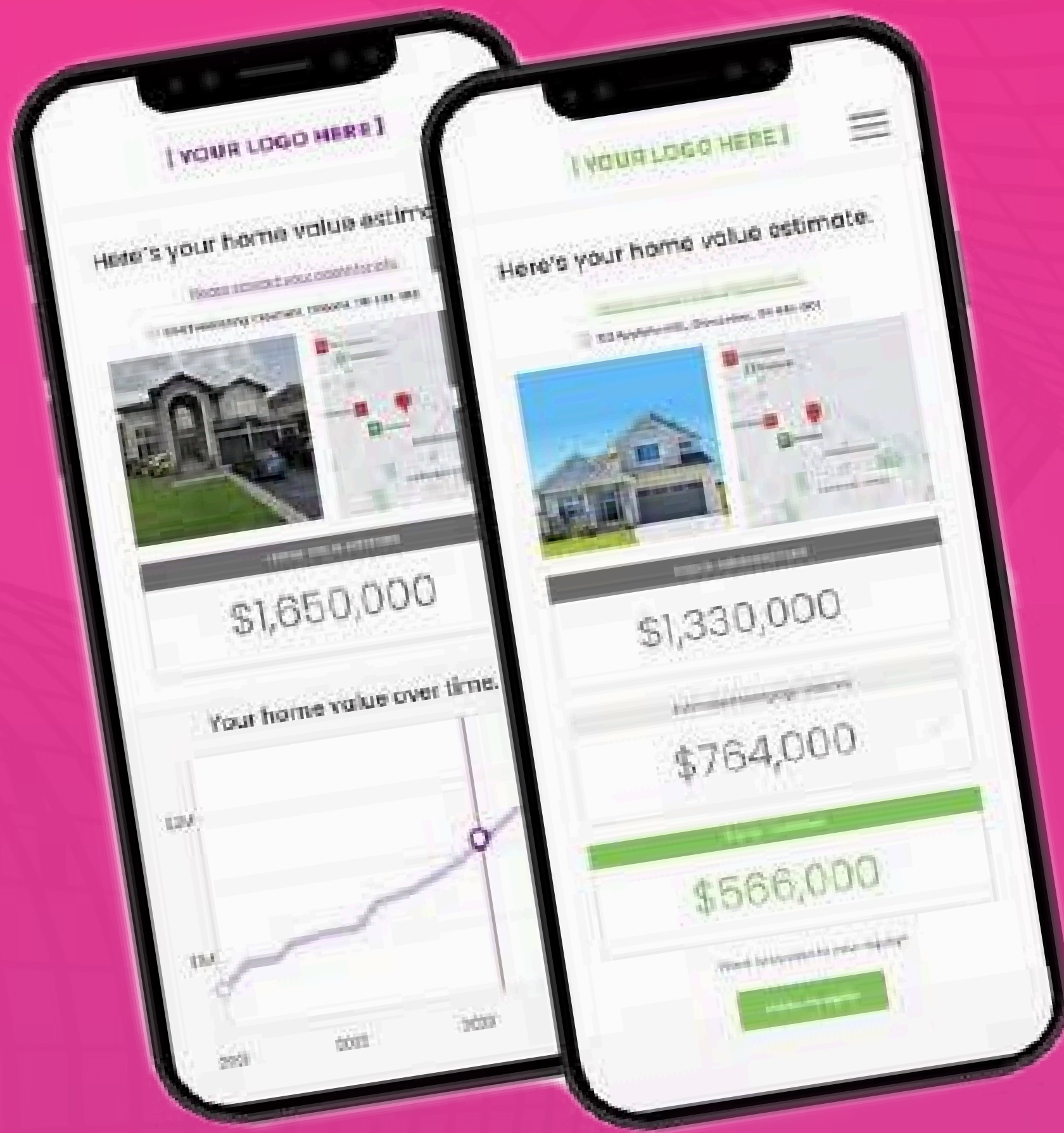
	Uses BrokerBot	Retention Rate	Client Repeating Transactions	Additional Loans Closed
Aloft Mortgages*	✔ Yes	40%	2,000 Retained Clients	1,000 loans closed
Bayview Mortgages*	✘ No	20%	1,200 Retained Clients	1,000 loans closed

Person A: 20 Worker

Delivering hyper-targeted information. Making it seamless for happy, profitable clients. The difference? An astonishing **800 lost loans**, even with the same new clients.

An average commission of **\$5,784**, per loan is a staggering **\$4.6 million in lost revenue.**

The result? Lost clients, lost referrals, and lost revenue.



The ROI of BrokerBot: More Than Just Revenue

Let's talk cost.

BrokerBot costs just \$300 per month or \$3,600 per year. Over seven years, that's **\$25,200 total**. To break even, a brokerage only needs to retain four extra clients.

But in reality? The brokers using BrokerBot generate significantly more loans. For Aloft, they saw an increased retention rate of **29% in the first year**. That's an **ROI of 2000%** or more.

In Aloft's Own Words...

"Before BrokerBot, we struggled to keep clients engaged beyond the initial transaction. Now, with automated home value updates and personalized touchpoints, our client retention has soared. Customers love the insights, and we stay top-of-mind without lifting a finger. Thanks to BrokerBot, repeat business and referrals have become our new norm!"

Benefits Beyond Revenue

And it's not just about the money. Without automation, brokers spend hours chasing past clients—crafting emails, gathering home values, and guessing the right timing to reach out. BrokerBot does it all:



Automatically sends personalized home valuation updates



Tracks homeowner equity for upselling opportunities



Identifies when clients might be ready to refinance or buy again

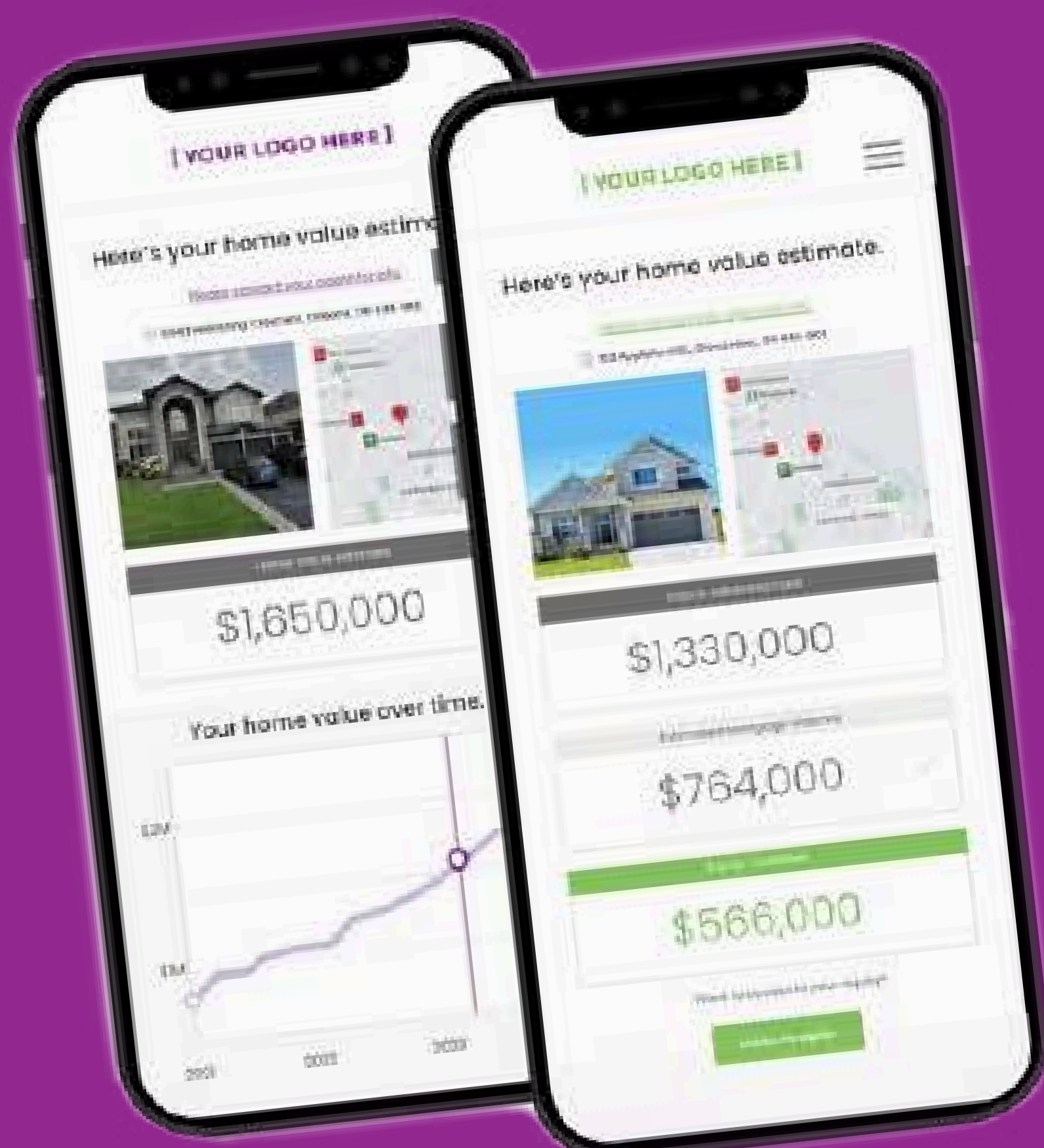
The result? Brokers get to focus on what they do best—closing deals.

The Bottom Line: You're Either Retaining Clients or Losing Them.

In today's market, lenders and brokerages can't afford to let clients drift away. The difference between **20% and 40% retention** is between making **\$16M** or leaving it on the table.

Which side do you want to be on?

Book a demo today and see how BrokerBot can help you own your funnel, clients, and future.



 **Start Your Free Demo Today**

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

[Book My Free Demo](#)