CASE
STUDY

RETENTION

brokerbot

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

How One Mortgage Brokerage Unlocked Hidden Revenue with BrokerBot

Home value data and client retention for Canadian mortgage and real estate professionals.

thebrokerbot.ca

01. THE PROBLEM

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.**

02. THE CHALLENGE

The Challenge of Client Retention

68%

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

33%

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.**

03. THE SETUP

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.

5,000
clients on the books

600
new clients a year

7 yrs
between transactions

But there's one crucial difference:

ALOFT MORTGAGES

Aloft automated client engagement with BrokerBot, sending personalized home valuation updates, market insights, and equity tracking to stay top-of-mind.

BAYVIEW LENDING

Bayview stuck with traditional marketing and only reached out occasionally before coming to BrokerBot.

The outcomes were telling.

*Brokerage names anonymized for privacy purposes.

04. THE RESULTS

Comparing Outcomes

Automated Monthly Home Valuation Updates

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

Equity Tracking

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

Personalized Market Insights

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

Alerts

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Meanwhile, Bayview stuck to outdated marketing tactics: sporadic outreach, generic newsletters, and zero automation.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.

	USES BROKERBOT	RETENTION RATE	CLIENT REPEATING TRANSACTIONS
Aloft Mortgages*	Yes	**40%**	**2,000** Retained Clients
Bayview Mortgages*	No	**20%**	**1,200** Retained 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 **$4.6M** in lost revenue.

05. THE ROI

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.

$300	$25,200	4	2000%+
per month	over seven years	clients to break even	ROI for Aloft

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!"

06. BEYOND REVENUE

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.

07. THE BOTTOM LINE

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