

# Turn your loan data into protected revenue.

Bespoke reporting, commission tracking, and retention processes for home loan brokers — built around the systems you already have.

# Blind spots that are costing you commission

## WHERE REVENUE LEAKS

### \$ Commission you can't verify

Upfront & trailing commission from many lenders on different cycles – it can be difficult to track and monitor for unpaid commission

### 🔄 Clients refinancing away

Gain visibility of existing clients that are refinancing in an economic environment of cashback campaigns and frequently changing interest rates

### ⚙️ Manual work that doesn't scale and is expensive

We can support with optimising and automating business processes to create time for value adding activities including leveraging AI

## WHY WORK WITH US

### We have seen both sides of broker lending

Extensive experience in optimising processes for **lenders** and **brokers**.

Expertise in enhancing customer experience and reducing processing time across the home loan lifecycle.

### We leverage AI & new technology

We are experts in supporting businesses implement AI tools and new technologies - ensuring investments realise their expected benefits and increase revenue/reduce costs

# How can I get started?

## CONTACT US

Get in touch

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## THE PROCESS

1

WEEK 1

### Discovery

Book an initial 30-min consultation meeting - free of charge and with no commitment

2

WEEK 2

### Model

Share your data extracts from your current systems (CRM, aggregators, etc.)

3

WEEK 3

### Build

We analyse your data and build a bespoke dashboard, tracking commission and refinances

4

WEEK 4

### Embed

We provide training to your team on how to use and maintain the dashboard

## COST

BESPOKE DASHBOARD

**\$2k** one-off

Bespoke dashboard built around the systems you already use - provides actionable insights to track commission and retain business

MOST POPULAR

BESPOKE DASHBOARD & COMMENCE AI ADOPTION

**\$5k** one-off

Bespoke dashboard tracking commission and refinances. Implement first AI use case, delivery training, and implement governance framework

BEST VALUE

BESPOKE DASHBOARD & WIDESPREAD AI ADOPTION

**Custom** + retainer

Bespoke dashboard tracking commission and refinances. Adopt AI across multiple use cases and transition to wide adoption