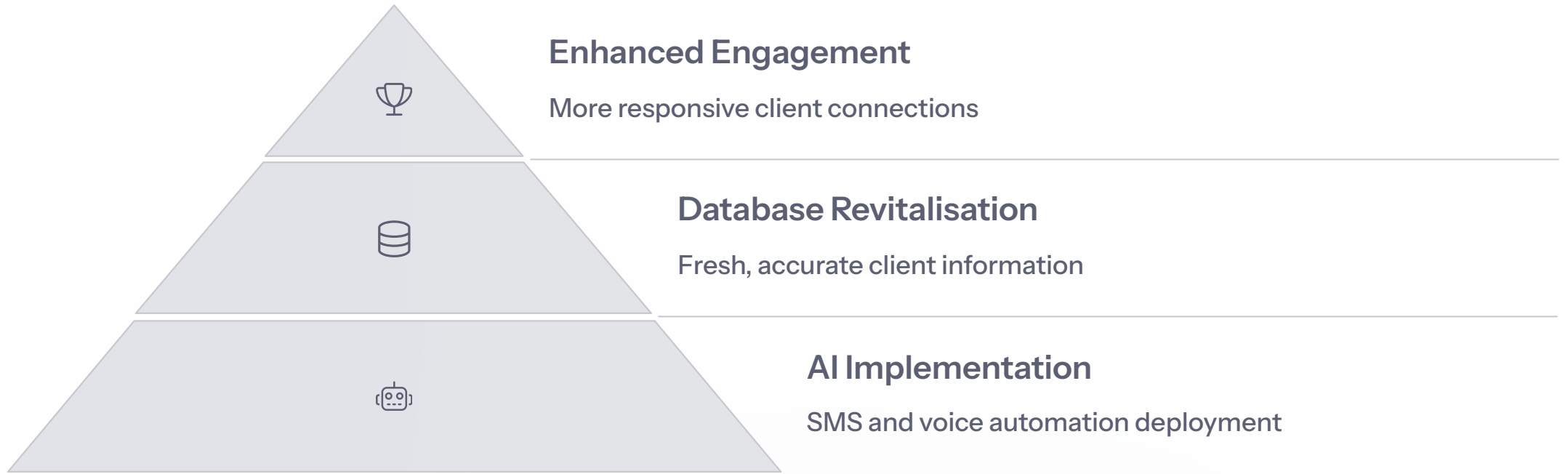# AI-Powered Marketing Rollout for Mortgage Brokers

A revolutionary 1-month plan to revitalise your mortgage broker database through cutting-edge SMS and Voice AI technology.

Beginning with a targeted database pilot before expanding nationwide to transform your broker engagement strategy.

Project Overview and Objectives

Enhanced Engagement

More responsive client connections

Database Revitalisation

Fresh, accurate client information

AI Implementation

SMS and voice automation deployment

Our AI platform will breathe new life into stale databases. Brokers will experience streamlined communication through intelligent automation.

Rollout Timeline: 1-Month Action Plan

Week 1
Clean and segment broker database for optimal targeting.

Week 2
Launch AI SMS campaign. Develop voice AI scripts.

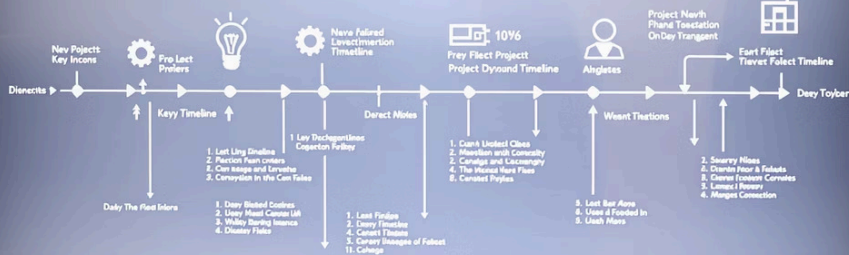## Week 3
Execute pilot program. Gather live feedback.

Week 4
Optimise performance. Prepare for nationwide expansion.

Each week builds upon previous successes. Our systematic approach ensures measurable progress throughout the campaign.

Pilot Launch

Targeted Outreach

Connecting with 100+ existing clients through personalised AI.

Tailored Context

AI tailors messaging to client objective specifics.

Baseline Metrics

Capturing key performance indicators from day one.

The existing database serves as our proving ground. This focused approach allows for rapid iteration before national rollout.

AI Tech Stack: SMS & Voice Calling

Automated SMS Delivery

AI-driven text messaging with personalisation at scale. Messages adapt based on broker profiles and responses.

Intelligent Voice Technology

Voice AI handles inbound calls, answers questions, and routes qualified leads. Natural-sounding conversations build trust.

Real-time Analytics Engine

Continuous data analysis refines targeting and messaging. System learns from every interaction.

Our integrated tech stack works seamlessly together. Each component enhances the effectiveness of the others.
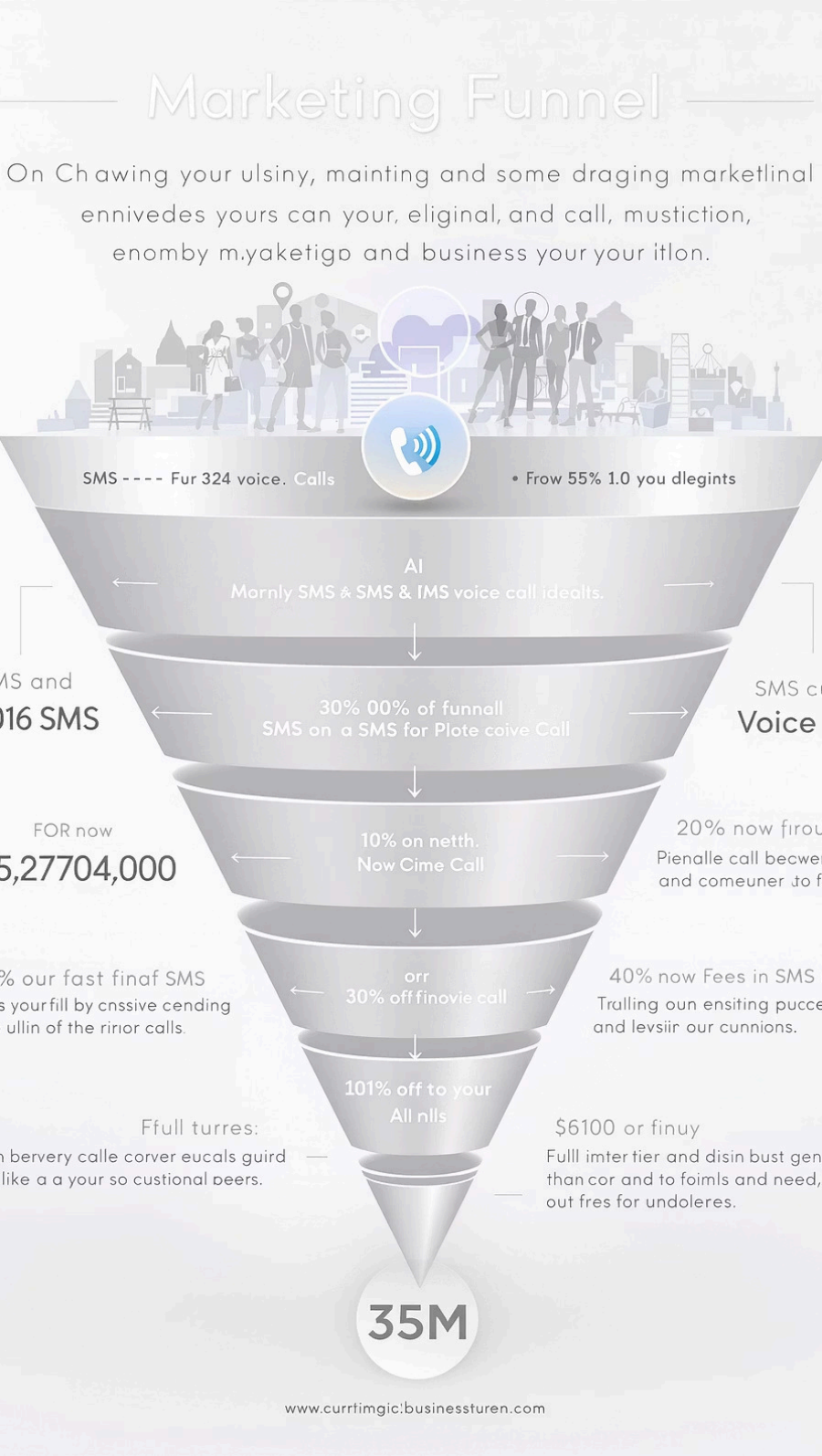
Marketing Sequencing & Engagement Strategy

Initial SMS Contact

Personalised introduction with clear value proposition.

AI Voice Follow-up

Intelligent calling reinforces messaging and gathers feedback.

Lead Scoring

AI analyses engagement signals to prioritise opportunities.

Optimised Retargeting

Refined messaging based on individual broker client responses.

Our multi-touch approach ensures maximum broker/client engagement. Messages adapt in real-time based on interaction data.

Measuring Success: Key KPIs

22%+

Response Rate

Combined SMS and AI voice call engagement target.

6%+

Conversion Rate

Lead-to-appointment during pilot phase.
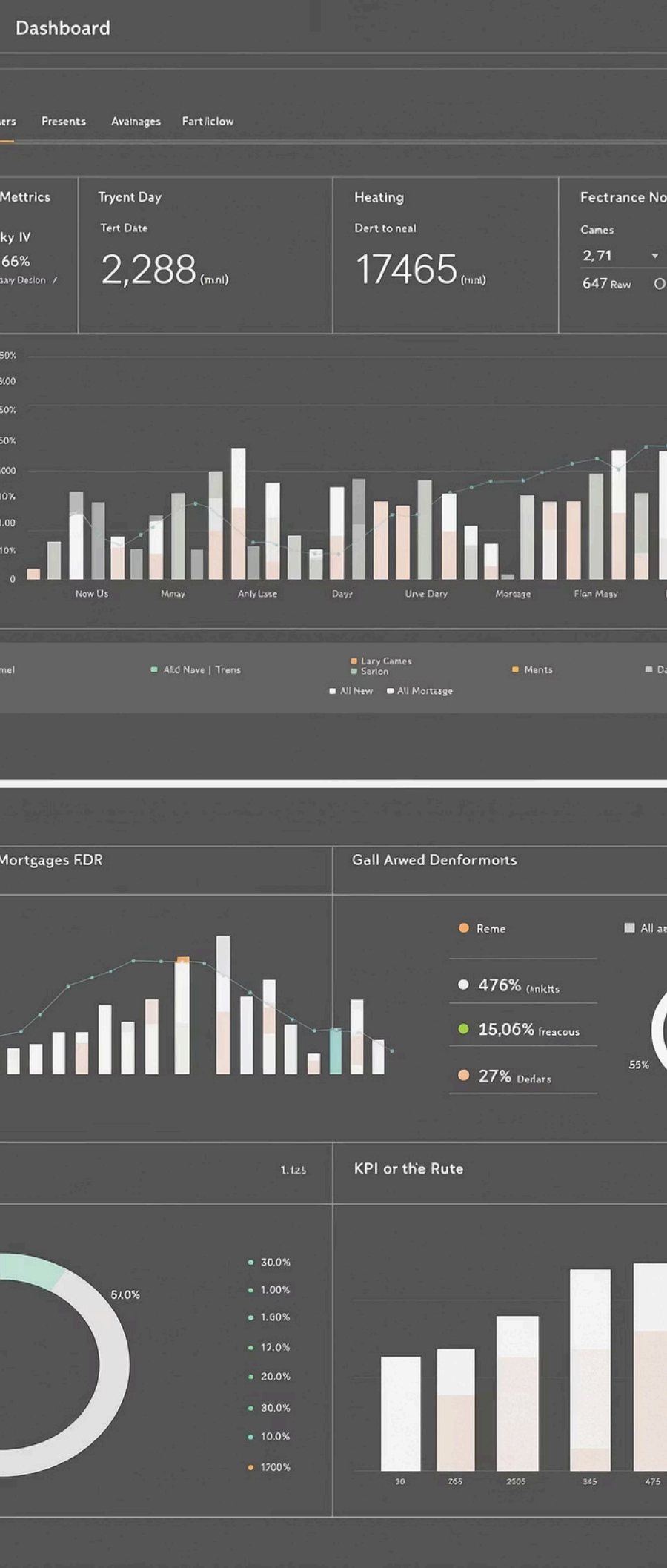
40%

Time Reduction

Decrease in manual processing requirements.

30%

Pipeline Growth

Increase in broker business volume.

Success metrics are clearly defined and measurable. We'll track progress daily and report outcomes weekly.

Expansion: Scaling Across Australia

Refine

Optimise AI models with existing pilot data.

Scale

Roll out state-by-state based on data insights.

Improve

Continuous AI optimisation supports ongoing growth.

Launch

Complete nationwide deployment by month-end.

Our nationwide expansion follows a proven pattern. Each new market benefits from previous learnings.