

AI Broker Workflow Automation

5-Minute Demo (Early Prototype)

当前 Broker 常见 Workflow (Before)

客户资料收集

- Email / 微信 / 短信 / 电话
- Payslip、Bank Statement、ID 分散



人工整理信息

- 收入
- liabilities
- living expenses
- rental income



重复录入

- Bank serviceability spreadsheet
- CRM
- Quickli



人工核对

- 避免遗漏
- 防止 calculation 错误
- 检查 borrower structure

AI-Assisted Workflow (After)

Step 1 — 客户上传资料

- 上传 PDF / Excel / Text
- 或直接填写表单

Step 2 — AI 自动提取

- Borrower profile
- Income summary
- Existing liabilities
- Property details
- Living expenses

Step 3 — AI Structure Review

- 缺失字段
- 重复 liabilities
- weekly / monthly conversion
- 异常数据提醒

Step 4 — Spreadsheet Assist

- 自动填入 lender spreadsheet
- serviceability calculator
- pre-assessment template

Demo Video

Serviceability Copilot video demo: shows how the system extracts and processes client finance data, then automatically fills ANZ and UBank serviceability calculation spreadsheets.

<https://youtu.be/DsEk15ZLs2g>

Potential Time Savings

Workflow	Current	AI Assisted
Client data 整理	20–40 mins	3–5 mins
Spreadsheet 录入	15–30 mins	1-click assist
核对检查	Manual	AI assisted
客户基础问答	Manual	24/7 AI response

Potential Benefits

对 Solo Broker

- 减少重复工作
- 降低 admin overload
- 更快 response time

对 Team Broker

- 减少 assistant dependency
- 降低 training cost
- 更容易 scale

当前阶段

△ Early Prototype / Workflow Validation Stage

- 与 broker 一起验证真实 workflow
- 找出最耗时间步骤
- 优化实际使用场景

Looking for 2–3 Pilot Brokers

- 有真实 loan workflow 的 broker
- 愿意提供 feedback
- 一起测试 automation flow

Contact

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Focused on AI Workflow Automation for Mortgage & Property Industry