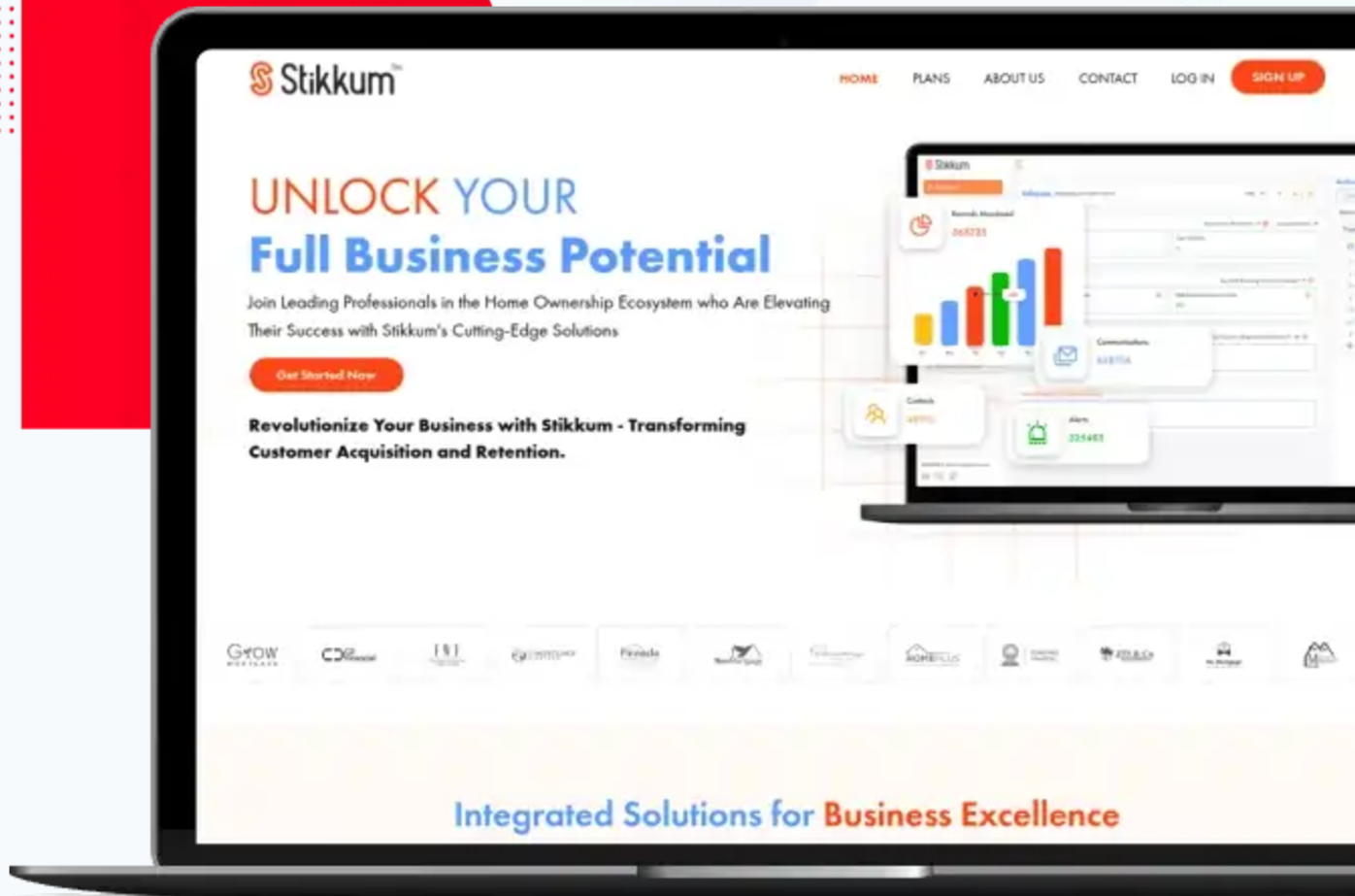


● CASE STUDY

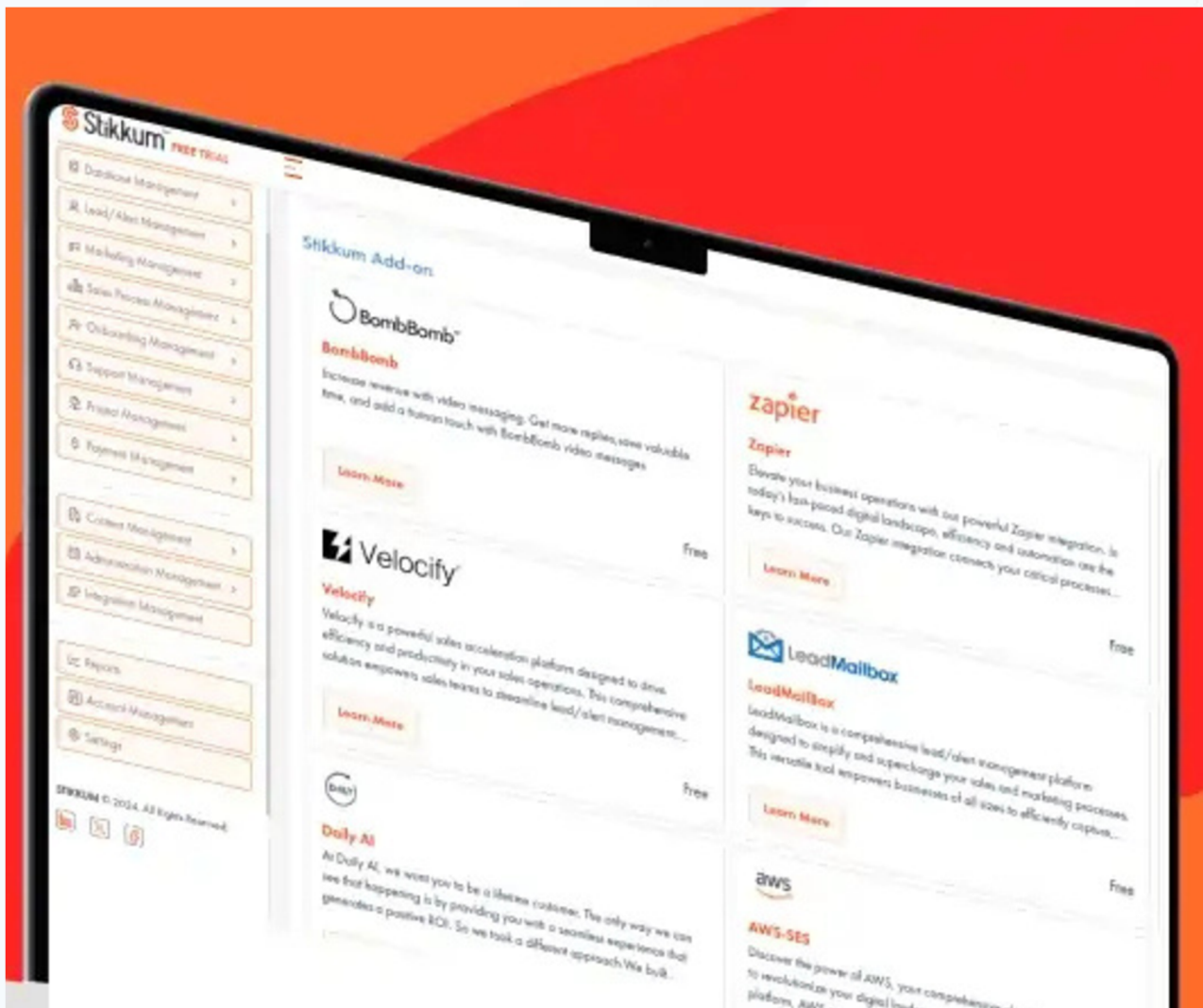
Stikkum - Revolutionising Client Retention for Mortgage Brokers





Revolutionising Client Retention for Mortgage Brokers

In the highly competitive mortgage industry, client retention and lead management are crucial for sustained growth. Recognizing these critical challenges, the founders of Stikkum—Babul Shanta Prasad, James Borden III, and Jeff Londres—envisioned a solution to address these issues. They identified the need for a robust platform that could streamline processes, automate communication, and provide actionable insights. This vision led to the development of Stikkum, designed to enhance client engagement and improve efficiency for mortgage brokers.



* Overview

Stikkum is a cutting-edge client engagement platform developed to address the unique challenges faced by mortgage brokers in managing client relationships and nurturing leads. Designed with advanced automation and an intuitive interface, Stikkum empowers mortgage brokers to streamline their operations and enhance client interactions throughout the entire lifecycle.

* Challenges

Mortgage brokers face several challenges in managing client relationships and nurturing leads. These include:



Complex Lead Tracking

Difficulty in efficiently tracking and managing leads throughout the sales funnel.



Inconsistent Follow-Up

Challenges in maintaining consistent communication with leads, leading to missed opportunities and lower conversion rates.



Manual Processes

Reliance on manual workflows and templates, which are time-consuming and prone to errors.



Limited Insights

Lack of real-time data and analytics to make informed decisions and optimise strategies.



* Development and Vision

The need for an effective client engagement tool was recognized by Agami Technologies, leading to the development of Stikkum. The platform was conceived by Babul Shanta Prasad, Founder of Agami Technologies and Stikkum, who sought to address the specific challenges faced by mortgage brokers. Alongside Founders James Borden III and Jeff Londres, the team combined technical expertise, strategic vision, and dedication to create a platform that effectively meets the needs of mortgage brokers.



* About Agami Technologies

Founded in 2011 by Babul Shanta Prasad with support from Jaymita Prasad and family, Agami Technologies embarked on a journey to revolutionise industries through technology. The company started with a small \$20 project and personal sacrifices, including selling personal assets to sustain the business. Despite these challenges, Agami Technologies persevered, rebuilding and developing successful platforms and products that garnered attention in the US market.

With the addition of James Borden as Co-founder and Managing Partner for US operations, Agami Technologies expanded its reach and continued to innovate. The company remains committed to its founding principles of integrity, innovation, and excellence, which are evident in the development and success of Stikkum.



Focused on simplifying complex problems, Babul's experience with Agami Technologies drives Stikkum's innovative and user-friendly design.

Babul Shanta Prasad

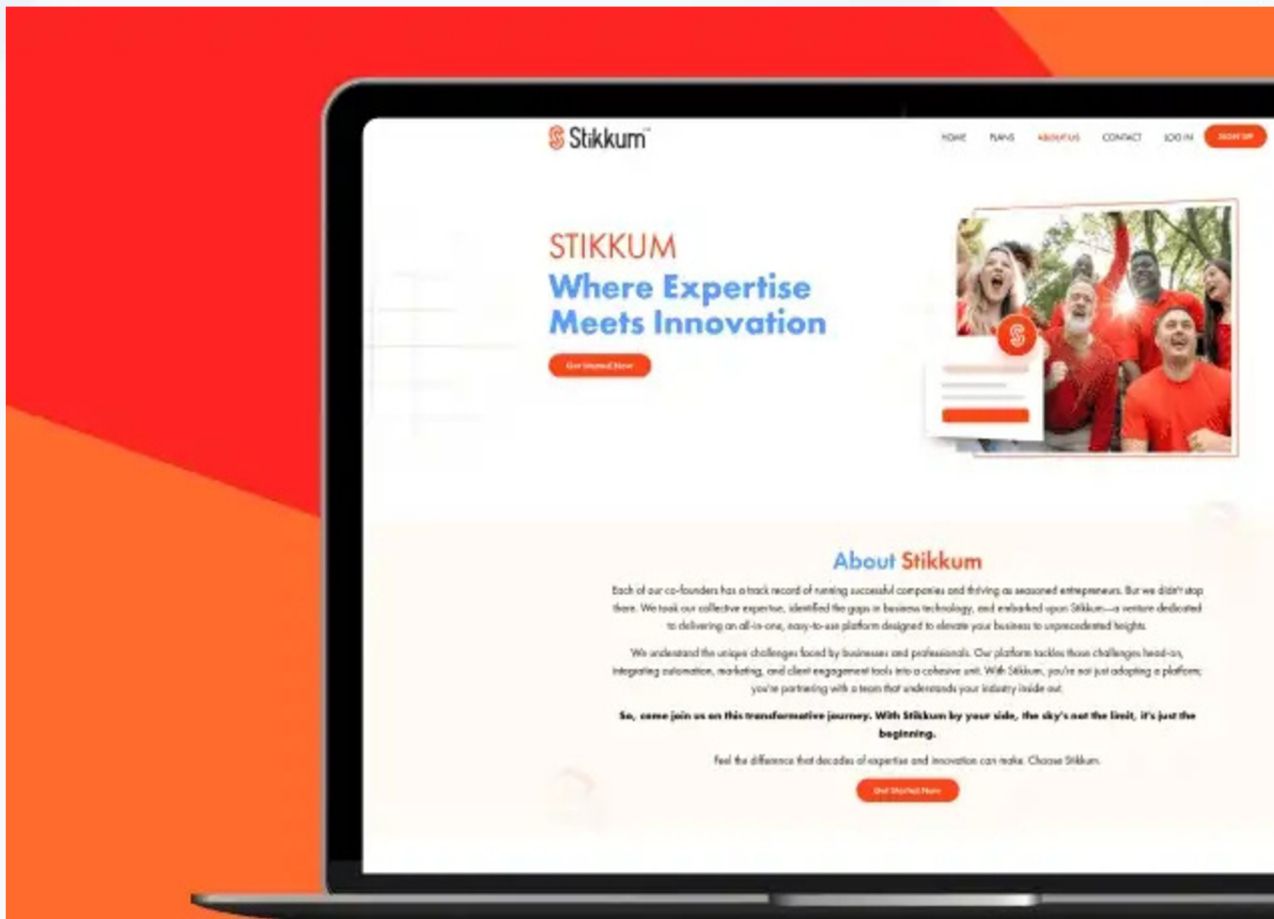
JB's background in the mortgage industry and military service contributed to a disciplined approach in the development process; these commitments to customer service shape Stikkum's client-focused approach.

James Borden III



Jeff's expertise in sales and technology inspired Stikkum's tools and processes, aiming to help professionals achieve excellence.

Jeff Londres



* Solutions

Client Acquisition & Retention:



Lead Management

Stikkum's lead management tools enabled Agami Technologies to efficiently track and nurture potential clients. This feature allowed the team to prioritise leads based on their engagement level and potential value.



Automated Follow-Ups

The platform's automated follow-up sequences ensured consistent communication with leads, converting them into loyal clients. Personalised retention campaigns played a crucial role in maintaining client relationships.

Automated Workflows & Templates:



Efficient Task Management

Stikkum's automated workflows streamlined internal processes, reducing the time and effort required for routine tasks. This allowed the team to focus more on strategic activities.



Customizable Templates

The platform offered customizable email templates and messaging scripts, ensuring consistent and personalised communication with clients.

Analytics & Integration:



Real-Time Analytics

Stikkum's analytics dashboard provided real-time insights into engagement metrics, campaign performance, and lead conversion rates. This data-driven approach allowed Agami Technologies to refine their strategies and improve outcomes.



Seamless Integration

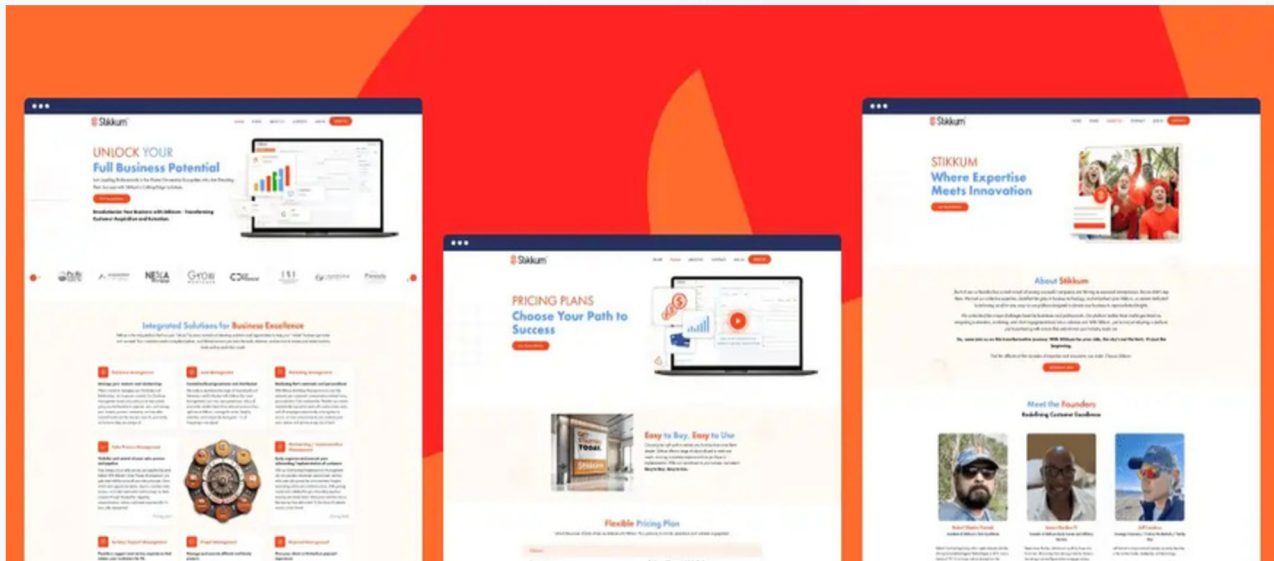
Stikkum integrated smoothly with Agami Technologies' CRM system and other tools, ensuring a cohesive workflow and better data management.

User-Friendly Interface:



Intuitive Design

Stikkum's user-friendly interface made it easy for team members of all skill levels to navigate and utilize the platform effectively. The responsive design allowed access from any device, providing flexibility and convenience.



* Results

Implementing Stikkum resulted in significant improvements for Agami Technologies :



Increased Efficiency

Automation of workflows and follow-up processes reduced manual effort, leading to a 30% increase in team productivity.



Enhanced Client Engagement

Personalised communication and targeted campaigns boosted client engagement rates by 25%.



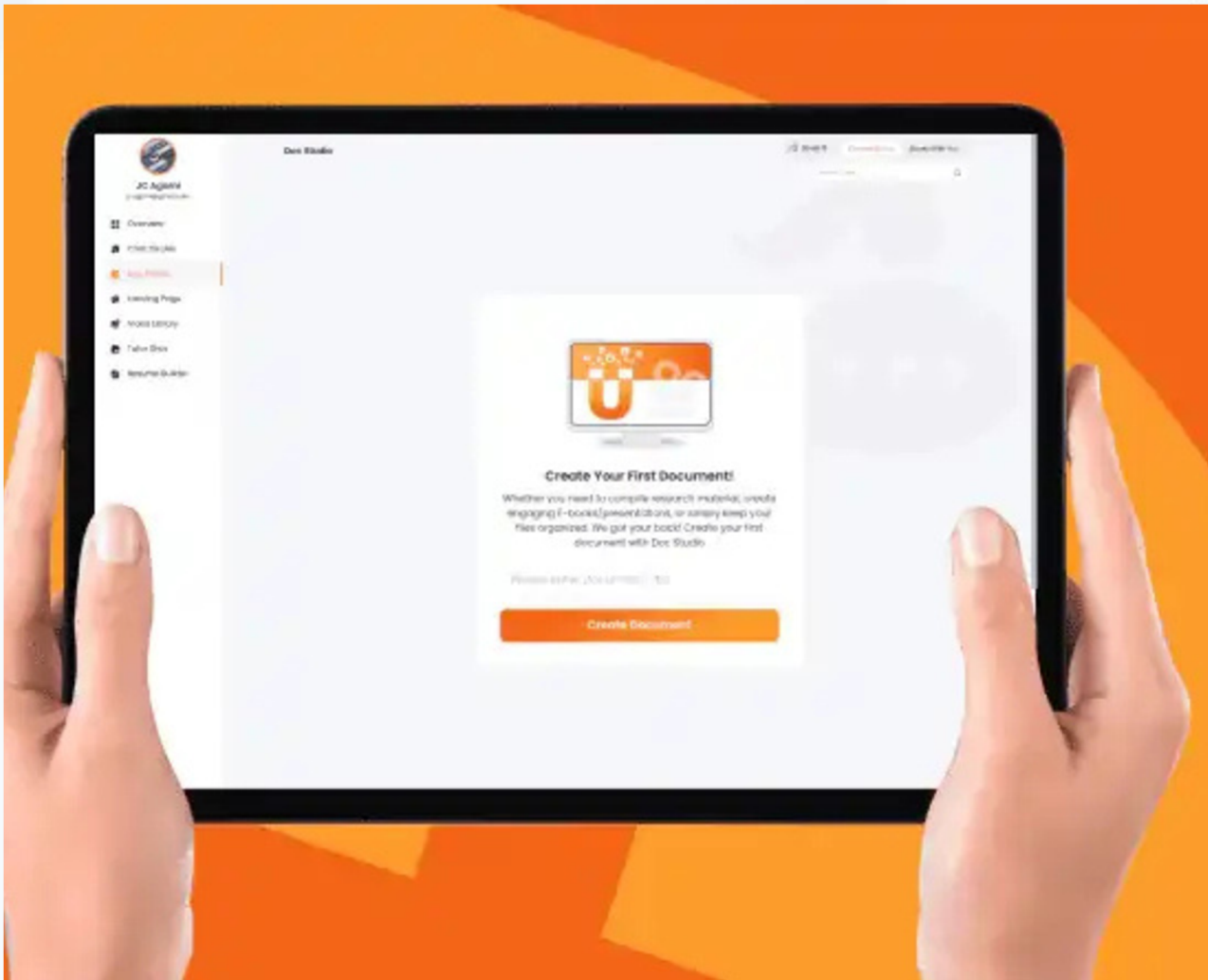
Improved Conversion Rates

Optimised lead management and nurturing processes contributed to a 20% increase in lead-to-client conversion rates.



Valuable Insights

Real-time analytics provided actionable insights, helping the company refine its client engagement strategies and achieve better outcomes.



* Conclusion

Stikkum stands as a testament to Agami Technologies' commitment to innovation and excellence. By providing mortgage brokers with the tools they need to retain clients and manage leads effectively, Stikkum is helping to transform the mortgage industry, one broker at a time.

For more information about Stikkum, visit **www.stikkum.io**

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