

# AI Audit Report for Clearpath Mortgages

An Evaluation of AI Integration in Mortgage Brokering Services

## AI Audit Report – Clearpath Mortgages

**Date:** May 2025

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### Business Overview

Clearpath Mortgages is an independent, whole-of-market mortgage broker based in Biggleswade, Bedfordshire. Renowned for its personalised customer service and comprehensive market insights, Clearpath Mortgages provides tailored mortgage solutions, helping clients navigate the complexities of mortgage finance. With a commitment to transparency and efficiency, the company ensures customers receive the best available options to suit their financial needs.

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### AI Opportunity 1: AI Support Chatbot

#### Overview

Implementing an AI support chatbot can transform how Clearpath handles customer enquiries, by offering 24/7 assistance. The chatbot will handle common inquiries, provide mortgage information, and guide clients through simple processes.

#### Recommended Tool

**Chatbase** is recommended for its robust AI capabilities and ease of integration into existing platforms.

#### Estimated Time Saving

The introduction of an AI support chatbot is projected to save approximately **6 hours per week** by automating routine customer service tasks.

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## AI Opportunity 2: LinkedIn Content Agent

### Overview

A LinkedIn content agent can enhance Clearpath Mortgages' social media presence by automating content creation and scheduling. This tool can generate engaging posts, monitor trends, and maintain an active and professional online presence.

### Recommended Tools

Utilizing **Make.com** in conjunction with **OpenAI** will streamline content generation and scheduling processes, leveraging AI to craft insightful and relevant posts.

### Estimated Time Saving

This AI-driven approach is estimated to save **3 hours per week**, allowing staff to focus on strategic growth initiatives.

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## AI Opportunity 3: Google Review Management

### Overview

Enhancing Google Review Management can significantly impact Clearpath Mortgages' online reputation by ensuring consistent engagement with customer feedback. AI tools can prompt satisfied clients to leave reviews, respond to reviews promptly, and analyse feedback for continuous improvement.

### Estimated Impact

Implementing this AI solution is expected to **double the review count within 60 days**, thereby boosting the company's online reputation, visibility and attracting more potential clients.

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## Priority Order and Recommended Next Steps

1. **AI Support Chatbot:** Start with the chatbot to immediately enhance customer service efficiency and free up staff resources.
2. **Google Review Management:** Next, focus on review management to amplify online presence and credibility.
3. **LinkedIn Content Agent:** Lastly, implement the LinkedIn content agent to strengthen brand visibility and engagement on social media.

## Recommended Next Steps

- Book a free discovery call with James & Rose AI Solutions to discuss implementation.
- We build and configure your chosen AI tools within one week.
- Go live on a simple monthly retainer - no technical knowledge required on your side.

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## Contact Information

For further details or to discuss this report, please contact:

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