



Optimized: Transparent and user-friendly | **Lending:** Mortgage support
Listing: Real estate collaboration | **Operations:** End-to-end workflow automation

1. Mortgage Broker Solution

Goal:

OLLO streamlines the end-to-end mortgage process with AI-assisted client follow-ups, organized document management, and simple broker notes — helping brokers work more efficiently, acquire clients with ease, and stay on top of follow-up communication through automated email outreach.

Key Features:

- Email Integration
- Secure OAuth integration with Gmail and Outlook.
- All broker-client communication can be managed inside OLLO.
- Sent and received emails remain synced with the broker's original account (no duplication).
- AI-Powered Follow-Ups
- Automatic drafting of emails to request missing documents (e.g., NOAs, pay stubs, IDs).
- One-click broker approval before sending ensures full control.
- Consistent, professional tone improves client responsiveness.
- Document Management
- Centralized dashboard for uploaded files from clients.
- AI auto-tags and categorizes documents (income, credit, ID, assets, etc.).
- Summaries highlight missing or incomplete items.
- Document Verification
- AI extracts and displays key details (e.g., T4 income, employment type, credit balances).
- Provides a broker-ready summary for faster pre-approvals.
- Optional verification suggestions (e.g., employer contact confirmation).
- Efficiency & User Experience
- Modern, mobile-optimized interface.
- Minimal clicks required to view deal progress.
- Notification system for deadlines and missing items.

Deliverables:

- MVP:
 - User registration & login
 - Email integration
 - Document upload & AI summaries
 - Broker dashboard
- Post-MVP Enhancements:
 - Subscription and billing integration
 - Advanced AI verification tools
 - Multi-user team support (assistants, co-brokers)
 - Workflow templates for purchase, refinance, and renewal files

Success Metrics:

- Reduce broker administrative workload by 50%.
- Improve client response rates with automated reminders.
- Help brokers close more deals by shortening turnaround time.

2. Real Estate Agent Solution

Goal:

Empower agents with instant MLS document analysis, AI-assisted market research, and automated communication — giving them more time to serve clients and better data for negotiations.

Key Features:

- MLS & Contract Uploads
- Upload MLS listings, amendments, accepted offers, and seller declarations.
- AI extracts and summarizes property details (price, square footage, inclusions, disclosures).
- MLS photos and renovation history included: roof, kitchen, bathrooms, flooring, paint, major upgrades, and the year they were done.
- Provides a clear property overview for fast decision-making.
- AI Market Research & Comparables
- Secure Matrix account integration.
- Automated comparables on recently sold homes in the area.
- AI adjusts comparables based on renovation quality, year of updates, and property condition.
- Provides clear insight into whether a home is underpriced, overpriced, or fairly valued.
- Client Presentation Tools
- Generate clean, mobile-friendly property summaries.
- Instant access to MLS photos, renovation history, and key details during showings.
- Professionally formatted reports for buyers and sellers.
- Email & Communication
- AI drafts follow-up emails for clients, lawyers, lenders, and co-operating agents.
- Secure storage and syncing with the agent's existing Gmail/Outlook.
- Standardized communication ensures consistency across teams.

Deliverables:

- MVP:
 - MLS uploads with AI summaries
 - Property detail extraction (price, features, photos, renovations)
 - Basic dashboard
- Post-MVP Enhancements:
 - Full Matrix system integration
 - Automated, renovation-adjusted comparables
 - Client-ready presentation templates
 - Multi-agent/team collaboration

Success Metrics:

- Reduce MLS research and contract review time by 60%.
- Provide agents with renovation-aware insights for accurate pricing.
- Allow clients to make faster, more confident buying/selling decisions.