



JammJar

ANNEX · PRODUCTIVITY EVIDENCE

Live Customer · Productivity Impact

Measured productivity outcomes from a live JammJar customer — drawn directly from the customer's production database, covering 253-day periods either side of go-live. Anonymised — referred to throughout as "a live customer on JammJar".

DATE

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AUDIENCE

SBG Executive

CLASSIFICATION

Confidential

Contents

Four cards. The first is the headline — same team, doing more with less. The next three break down the productivity dimensions: lead efficiency, application output, time-to-application, and the customer-portal lift.

00 **Headline — same team, doing more with less**

21% fewer leads · 91% more applications · days-to-app 37 → 5.8 · 4.5× portal completion

01 **Lead efficiency**

238 leads/mo → 187 leads/mo · same team · better-managed enquiries

02 **Application output and time-to-application**

57 apps/mo → 109 apps/mo · 5.8 days customer-portal-submission to full-app

03 **The customer-portal completion lift**

44.6% portal completion · vs ~10% on the legacy portal · 4.5× lift in customer self-service

00

Headline — the same team, doing more with less

21% fewer leads, 91% more mortgage applications per month, days-to-application from 37 to under 6, and a 4.5× lift in customer-portal completion.

LEADS / MO

-21%

238 → 187 · same team, fewer but better-managed enquiries

APPLICATIONS / MO

+91%

57 → 109 · direct output of the productivity lift

DAYS TO APPLICATION

5.8

from 37.2 in Jul 2025 · an 84% reduction in lifecycle lag

PORTAL COMPLETION

44.6%

vs ~10% on the legacy portal · 4.5× lift in customer self-service

This is the productivity story SBG's strategic pillar is built on: **less noise at the top of the funnel, faster lifecycle through the middle, and a far higher share of customers self-serving the portal.** Measured directly on a live customer's production data. Numbers here are the headline summary; the full interactive dashboard linked elsewhere has every chart, every month, and every metric.

Comparisons use matched 4-month cohorts or the full 253-day window either side of go-live, depending on what each measure allows. The customer migrated to JammJar in July / August 2025. **The same team produced 91% more applications per month while handling 21% fewer leads.**

01

Lead efficiency — fewer leads, better outcomes

LEADS / MO BEFORE

238

matched 4-month cohort, pre go-live

LEADS / MO AFTER

187

matched 4-month cohort, post go-live

DELTA

-21%

Same team, fewer leads — but better-managed

Lead volume dropped 21% post go-live. That number on its own would look like a worsening — but read alongside the application output (+91%) it is the opposite: the team now spends less time on noise at the top of the funnel and more time on cases that actually progress. JammJar's AI-driven lead scoring and automated outreach mean the cases that don't qualify drop out earlier, and the cases that do qualify reach an adviser faster. Same headcount; far better signal-to-noise ratio.

02

Application output and time-to-application

APPLICATIONS /
MO BEFORE

57

matched 4-month
cohort, pre go-live

APPLICATIONS /
MO AFTER

109

matched 4-month
cohort, post go-live

DELTA

+91%

Direct output of the
productivity lift

DAYS TO
APPLICATION

37.2 → 5.8

84% reduction in
lifecycle lag

The same team produces 91% more mortgage applications per month than it did before JammJar — without a single new adviser hire. Time-to-application — the lag between a customer first interacting and having a full application submitted — collapsed from 37 days to under 6. The lifecycle bottleneck wasn't adviser capacity, it was the slow passage of information between customer and case-handler; JammJar's customer portal and case-management automations compress that window structurally.

03

The customer-portal completion lift

The clearest signal that the productivity lift is structural, not a one-off step-change.

JAMMJAR PORTAL
COMPLETION

44.6%

share of customers completing
self-service journey

LEGACY PORTAL
COMPLETION

~10%

broker industry baseline

LIFT

4.5×

structural shift in customer self-
service

44.6% of customers now complete their fact-find, document upload and consent steps through the JammJar customer portal — without an adviser intervention. The industry baseline on legacy portals is around 10%. That's a 4.5× lift in customer self-service rates, and it is the mechanism that makes the rest of the headline numbers possible. Less manual fact-finding by advisers; less chase for documents; less back-and-forth on consent. The customer does the work the portal is designed to support — and the team's bandwidth shifts to the part of the journey that actually needs human judgement.