



IMB™ MASTERCLASS CHECKLIST

Get Your
Operations Up
and Running


independent
mortgage brokers™



A Step-by-Step Checklist to Building Your MLO Operations

It can feel daunting to get your MLO operations up and running. There are many things you need to know before beginning. That's why we've created this checklist for you, with all the steps from start to finish!

01

Find a Mentor in the IMB™ Community

You don't have to brave the new world on your own. IMB™ connects you with a community of like-minded MLOs who are successfully enjoying the benefits of independent mortgage brokering. Mentors can be found by following the link on the portal home page or in IMB's "Find a Mentor" section. Select one that is knowledgeable about the independent mortgage side and has time to help you.

02

Choose a DBA Name

Choosing a *DBA name is one of the most important steps. Be sure to pick a name that is easy to pronounce and is not likely to be misspelled when prospective clients search for the name or enter the URL directly. You can take inspiration from your own name, your location (i.e., local geography or cities), or creative names that will resonate with your future customers. [Business Name Generator with Domain Name Availability](#)

*We allow the LO to brand and market themselves under a DBA. This ensures consistency of your website, email, & brand if you were ever to make a company move in the future. IMB™ registers the DBA with the NMLS and secretaries of states. We require "Powered by IMB™" with our company NMLS and address on all consumer communication, websites, & socials. We are not a net branching company. All loans are closed in IMB™'s name, and all commissions are paid to the licensed LO/individual.

03

Create a Website

Creating an initial digital footprint is the first step into growing your brand online.

1. Launch your website
2. Setup your Google My Business profile
3. Setup your Social Channels to promote your website on social media

Setting up your brand online is a foundational step. In addition to using them for future promotions, they work as trust signals to prospects that you have professionalism and legitimacy.

04

Generate Clients AKA "Leads"

Where do you find prospects? IMB™ registered users have access to marketing resources in the portal. After you signup, navigate to the MLO Marketing Strategy area to explore the following strategies to generate more clients:

1. Search Engine Optimization (SEO)
2. Social Media Marketing (LinkedIn Sales Navigator and Facebook Ads)
3. Email Marketing
4. Creative Content Postings for Facebook Groups
5. Local Market Events, Networking/Meeting New People
6. Expanding your Brand

As you know, one of the easiest ways to generate new business is through referrals. Generating new business requires marketing education. We've done all that work for IMB™ users, who have a fast track to what works.

05

Setup Shop

Decide if you want to be remote or go for traditional brick & mortar office space. Today, there are a lot of options for meeting with clients. Shared co-working spaces offer a hybrid approach and lower costs. You get a professional working space, access to conference rooms, with lower overhead. This may be a good approach to keep a closet tab on your revenue in the first 3-6 months.

06

Grow Your Team

Invest in people and partnerships. Successful MLO operations do not happen without team members who share your passion for what you're doing. Seek out those with complementary skills, as well as professionals with experience in your industry or related industries to provide the expertise you don't have. You may be surprised at how many people want to join an operation that's on the move and clearly cares about its workers and customers.

"You are always one decision away from a totally different life." —Mark Batterson

Call: (303) 717-4330