

CASE STUDY

Independent Mortgage Brokers LLC (IMB™)

A Digital Ecosystem That Supported IMB's Growth to #1

TL;DR

IMB™ needed to explain its supported-independence model and make that support easier for loan officers to access. Building on an established brand, **Poket Marketing expanded the recruiting website, developed a SaaS platform, and provides individual, cost-sensitive LO website options that propelled them to #1 among Colorado-based brokerages by volume and units.**

At a Glance

- ✓ Marketing Site for Recruiting
- ✓ Fast Launch Website for LOs
- ✓ Day-to-Day Portal for Efficient Loan Work

Key Takeaways

- **The SaaS portal signaled enterprise-level infrastructure.** Recruiter-led demos made IMB™'s tools, knowledge, and community tangible to bank loan officers, supporting recruitment by making the move to the independent channel feel less risky.
- **Efficiency was built into the ecosystem.** One workbook feeds hourly portal updates, while the \$500 LO website package supports fast, affordable launches. Using one agency that knows IMB™'s brand, portal, and LO community streamlines briefing and coordination, helping keep future marketing focused, on-brand, and cost-efficient.

A Digital Ecosystem Built Around Loan Officers

How Poket Marketing connected recruiting, member support, and individual loan officer websites for IMB™.

IMB™ wanted to combine the independence of the broker channel with the support, structure, and community loan officers valued at a bank. Co-founder Ryan Davis's experience in both models helped shape that vision.



“We wanted to take the best from both worlds.”

Ryan Davis, Co-Founder, IMB™

[Watch Ryan's story • About Us video, around 1:45](#)

Building on IMB™'s established brand, Poket Marketing helped bring that vision to life with an expanded recruiting website, a custom member platform, and affordable websites for individual loan officers. These all help explain the brokerage's value before someone joins and make practical support available afterward.

The Digital Ecosystem



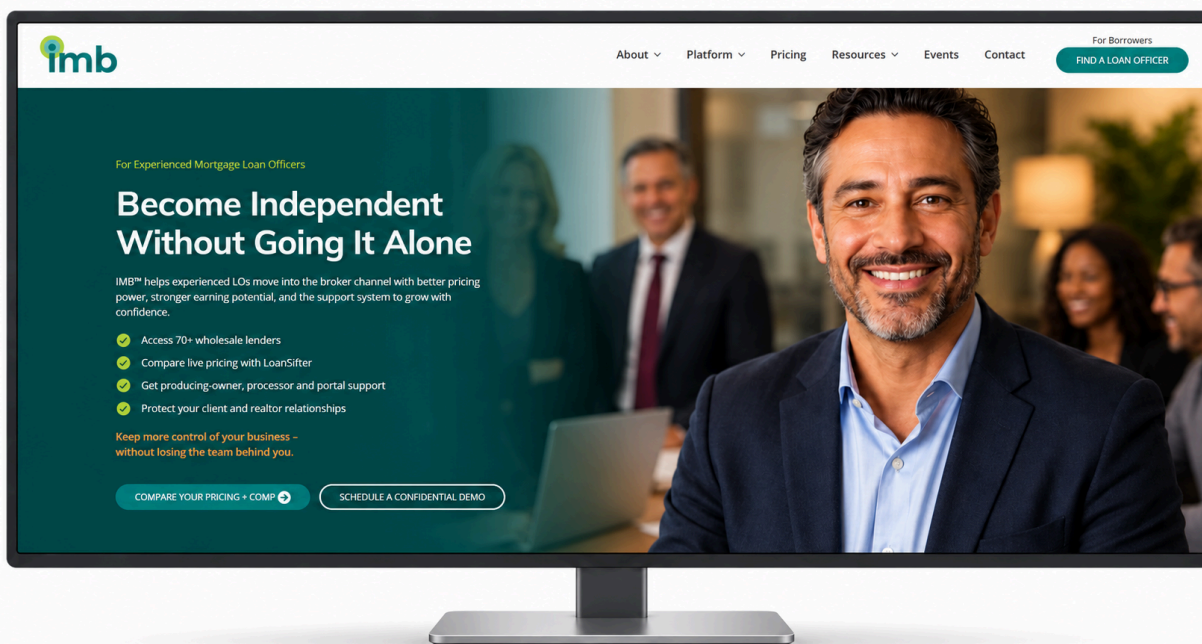
Making Supported Independence Clear

Building on an Established Brand

Danielle managed IMB™'s initial website project at her former agency. After she left, IMB™ asked her to continue working with them directly. Poket built on that strong visual foundation, expanded the limited copy, and added content that explained the brokerage's value.

Addressing the Questions Behind the Move

Bank loan officers were weighing more than pricing and compensation. They worried about losing support during difficult loans, as well as community, infrastructure, and marketing support. The recruiting story needed to address those concerns and explain IMB™'s approach to protecting client and realtor relationships.



The homepage pairs “Become Independent Without Going It Alone” with pricing and confidential demo next steps.

Poket developed messaging and educational resources around those concerns. A comparison of lending models and clear calls to action help prospects explore IMB™'s offer, compare pricing, and schedule a confidential demonstration.

Recruiter-led portal demos give that conversation a concrete next step: prospects can see the tools, resources, and community they would have access to after joining.

[Explore IMB™'s marketing website and resource library](#)

Helping Loan Officers Get Established

A Professional Presence of Their Own

For a loan officer moving into the independent channel, launching a professional website is another task to manage. Poket's individual website package gives IMB™ members a straightforward way to establish their own online presence while they focus on borrowers and loans.

Each site is adapted to the loan officer's business and brand. It complements IMB™'s public recruiting website and the tools available inside the member platform, extending support into the member's own marketing.

The advertisement features a large headline "A Faster Start for Loan Officers" under the "POKET MARKETING" logo. To the left, a pink box highlights a "\$500 ONE-TIME WEBSITE PACKAGE" and states "Four Pages. Your Brand." To the right, a computer monitor displays a sample website for "ONYX LENDING GROUP". The website includes a navigation bar with "About", "Loan Options", "Contact", and a phone number "(317) 688-1043". A "GET RATE QUOTE" button is also present. The main content area of the website says "LOCAL MORTGAGE LENDER" and "Bringing clarity, speed, and trust to home financing across Colorado and Indiana." It lists benefits like "Fast, transparent loan approvals", "Top lender network for better options", "Rate lock and strategy guidance", and "End-to-end loan management with real updates". There are "LOAN OPTIONS" and "APPLY NOW" buttons, along with a "NATIONAL MORTGAGE LENDING A+ Rating" badge. The background of the website shows a family walking in a modern home.

2-3 Business Days | After intake meeting and receipt of images. Hosting billed separately.

Example individual loan officer website • Onyx Lending Group • onyx-lending.com

A Clear, Defined Package

The \$500 one-time package covers a four-page individual loan officer website, delivered in 2-3 business days after the intake meeting and receipt of images. Hosting is billed separately.

For the brokerage, this adds a practical website option to the support available to new members. The \$500 price applies to the individual website package.

Turning Lender Information into a Workspace

The Opportunity Danielle Saw

The earlier portal presented useful lender information through a basic sidebar and embedded spreadsheets. After encountering its navigation and readability problems firsthand, Danielle proposed a workspace organized around how loan officers find information and move a loan forward.

The marketing relationship was already established when Danielle pitched the new portal. Both co-founders attended the meeting and agreed to the proposal on the spot.

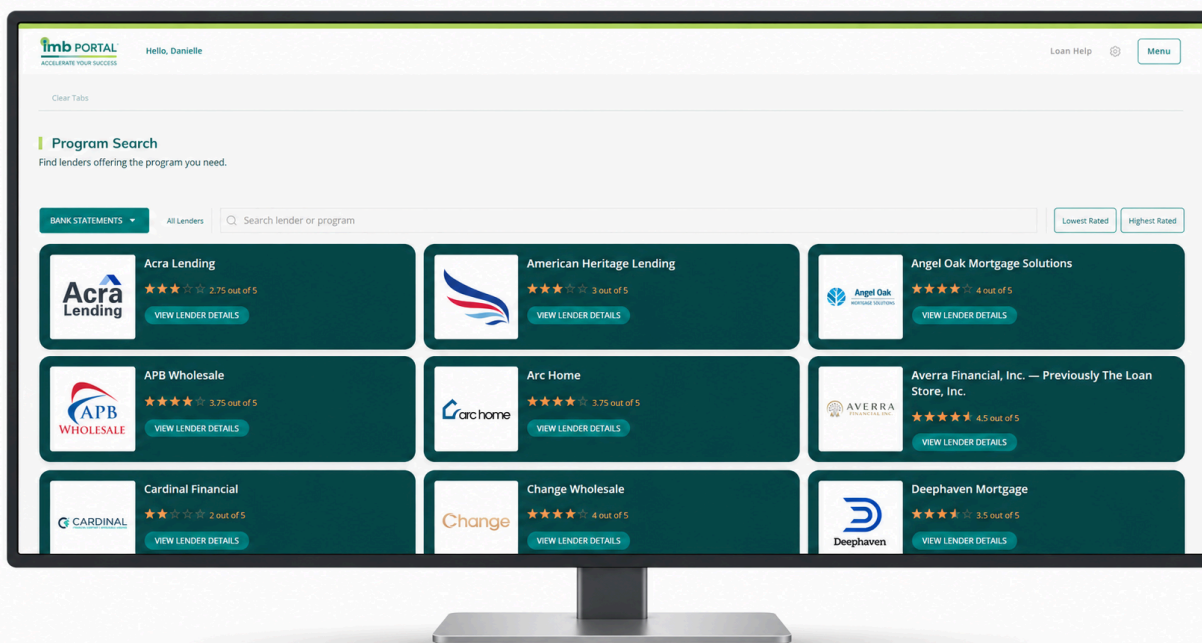
Design and Development

Danielle designed and developed the member platform, with help on the initial search setup and occasional technical support from Poket colleague Doug. The platform is delivered as a subscription service.

Program Search

Which lenders offer this type of loan?

Program Search filters the lender list by loan-program type. Members can review matching lenders and open a summary to investigate an option further.



Bank Statements is selected here; the lender cards show the resulting shortlist and a direct path to each lender's details.

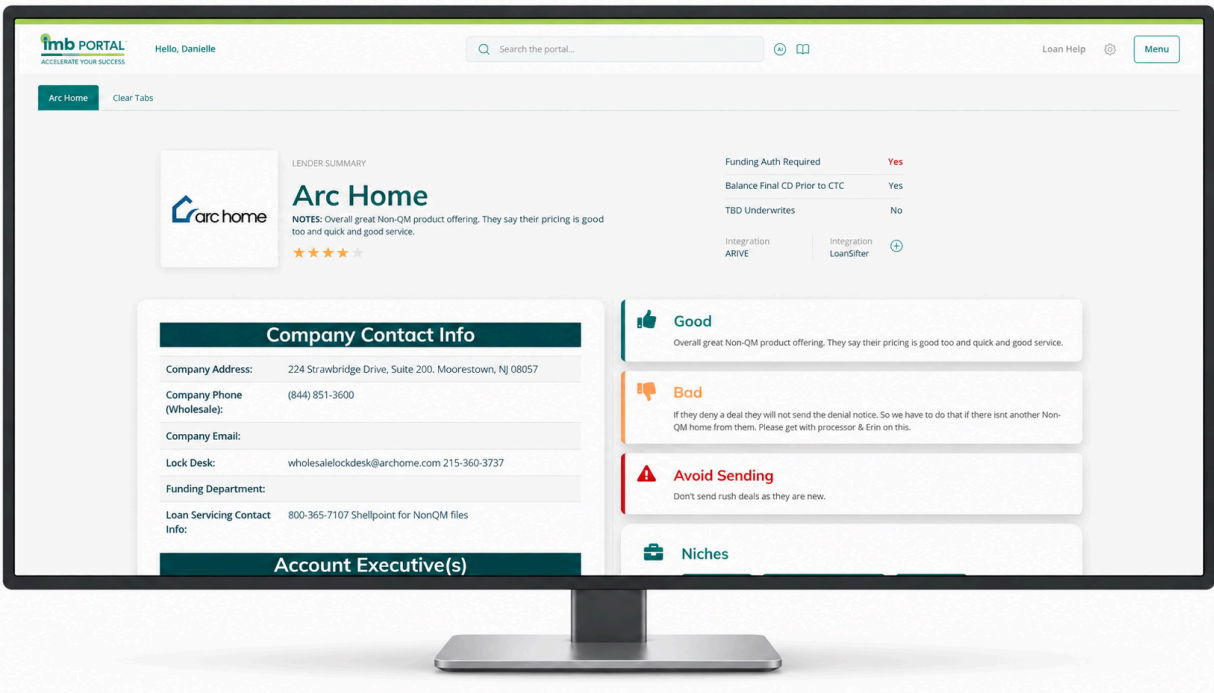
A practical starting point: members can begin with the borrower's loan need and narrow the information they need to review.

From a Shortlist to Lender Details

Lender Summaries

What should I know before working with this lender?

Lender Summaries bring key policies, contact information, product niches, and a related chat area together. Members can move from a shortlist to the details needed to evaluate a lender.



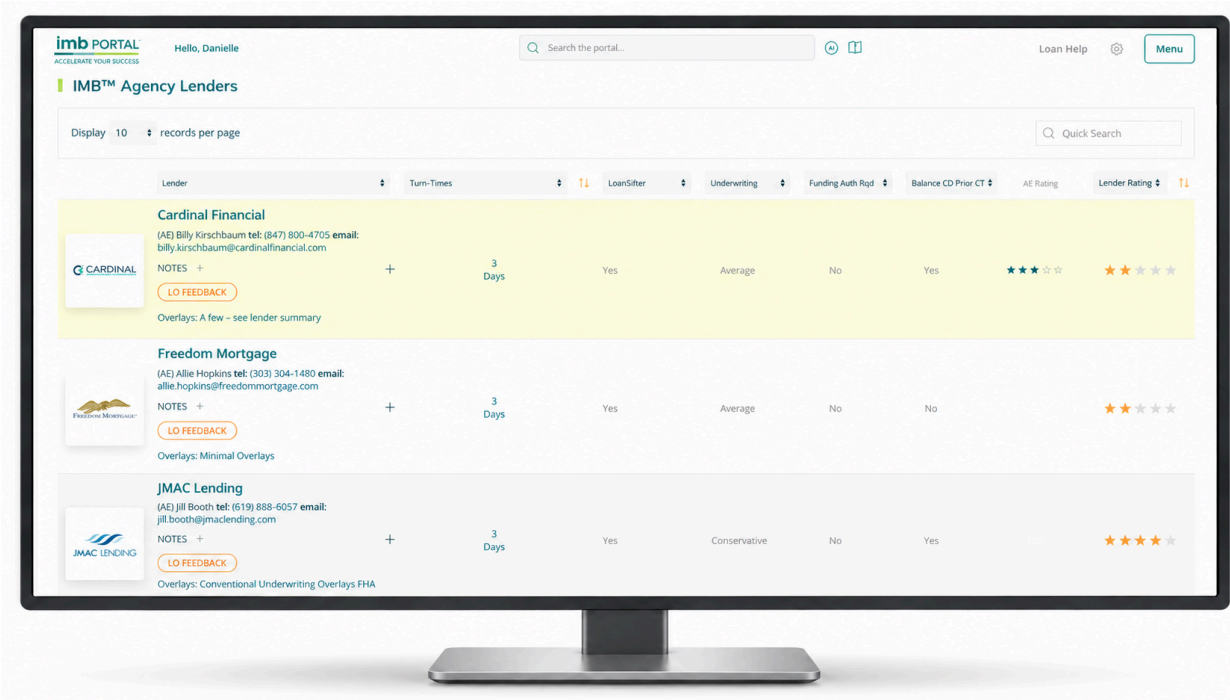
The Arc Home overview places company contacts and lender notes together, with a separate chat tab for related discussions.

For the brokerage, a consistent summary format makes its lender knowledge easier for members to find and use.

Lender Comparison

How do turnaround times and underwriting approaches compare?

Lender Comparison organizes operational details and ratings into shared categories. Members can review lenders side by side when considering how each might fit a loan.



Shared columns put turn times, underwriting information, and lender ratings in the same view.

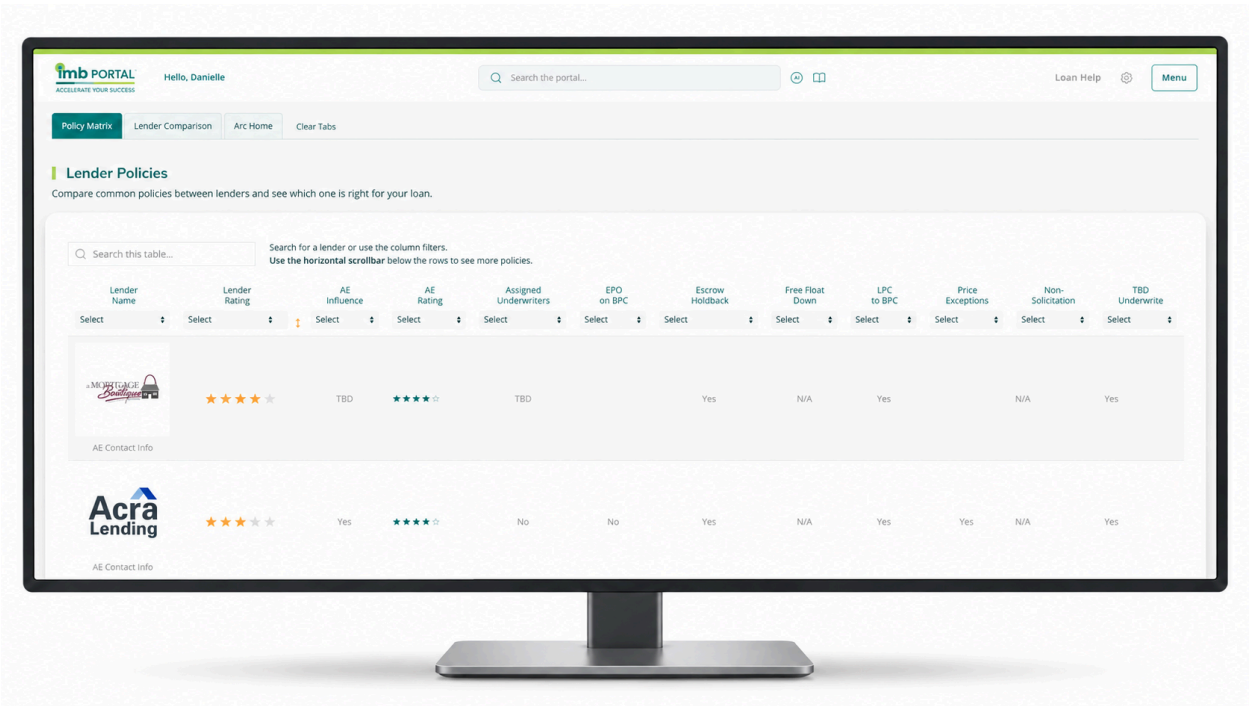
Program Search identifies options; Lender Summaries explain individual lenders; Lender Comparison helps members weigh their operating differences.

Find the Information Behind a Decision

Policy Matrix

Which lender policies fit this scenario?

The Policy Matrix focuses on lending rules and requirements. Members can search for a lender and filter individual policy fields to explore the relevant information.



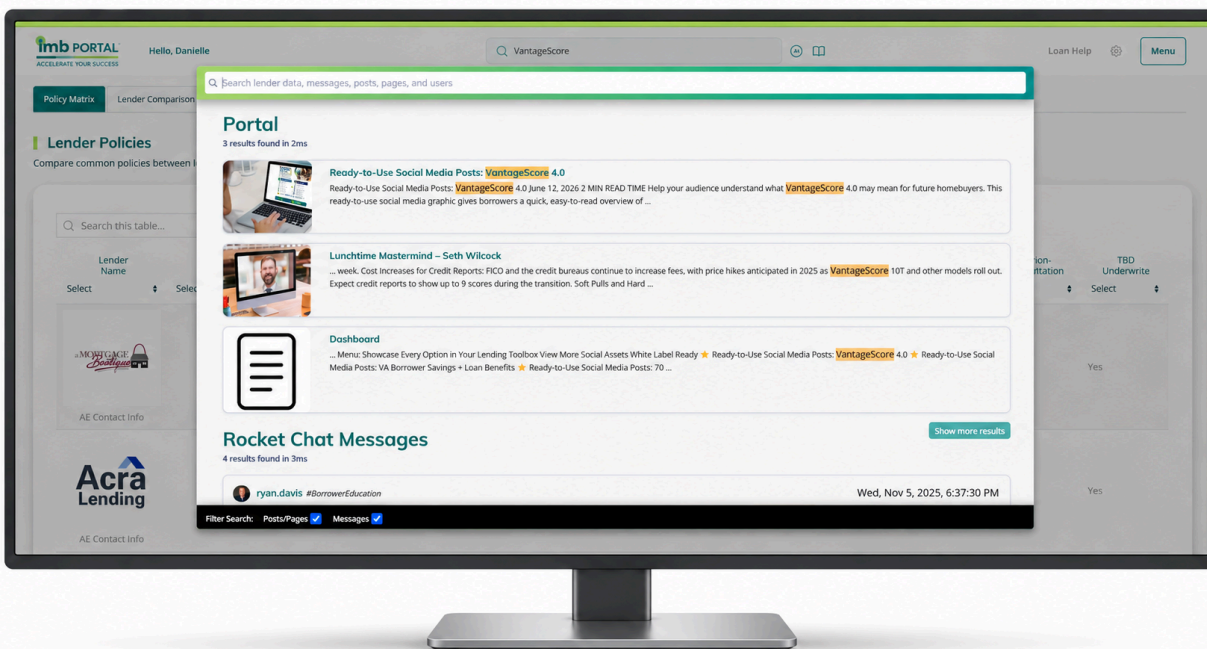
Filters beneath each policy heading let members narrow the table by the criteria they need to investigate.

Lender Comparison covers how lenders operate. The Policy Matrix helps members examine the policies that may affect a particular loan scenario.

Global Search

Has someone already answered this question?

Global Search brings portal resources and historical Rocket.Chat messages into one search experience. Members can find published guidance alongside answers shared in earlier community discussions.



A search for VantageScore returns both portal resources and Rocket Chat Messages in the same results panel.

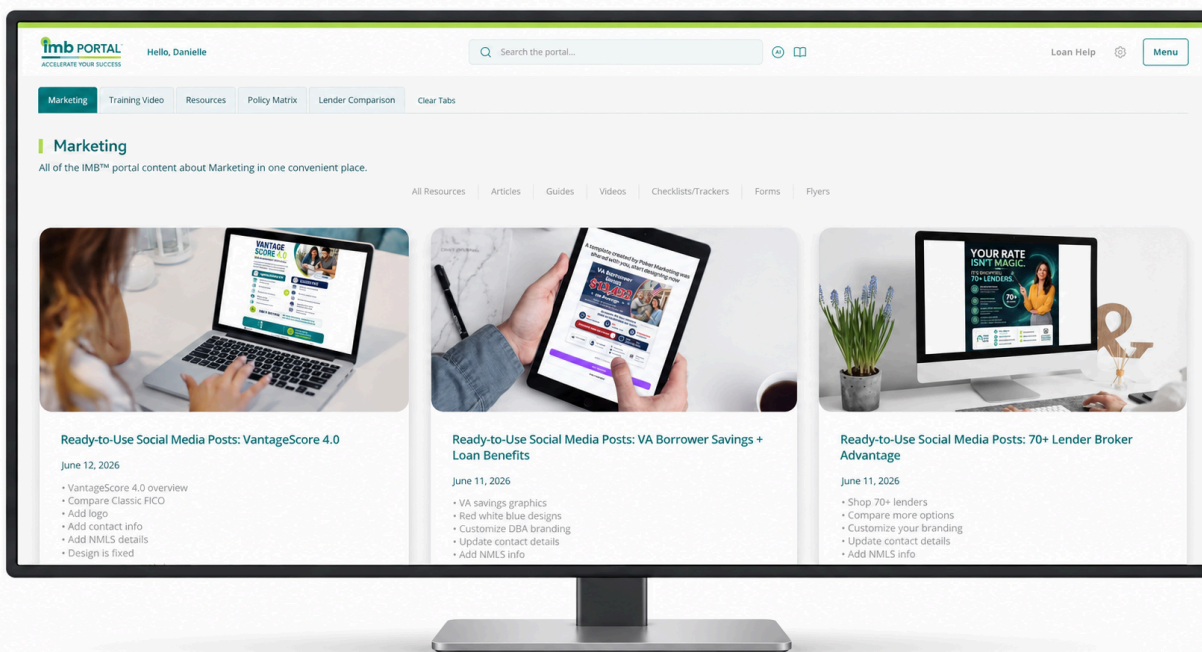
Earlier discussions become a resource members can return to when the same question comes up again.

Support Beyond the Loan File

Marketing Resources

What can I use for my own marketing?

Ready-to-use social graphics, flyers, and guidance give members practical materials to adapt for their businesses.



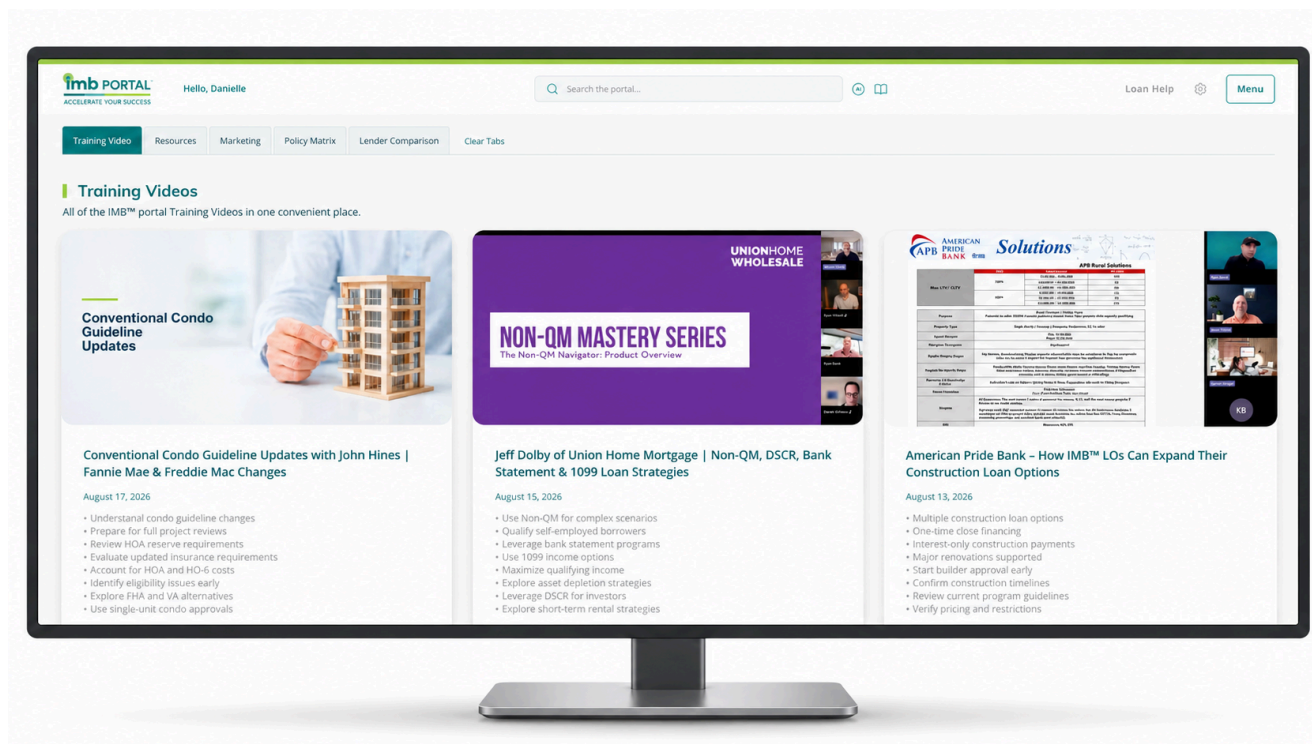
The resource cards preview available social-post topics, helping members choose relevant materials.

Together with an individual website, these resources give loan officers a professional online presence and content to keep their marketing active.

Training Library

Where can I find training after the live session?

Recordings and recaps keep lender education available for new members and for anyone who needs to revisit a topic.



The library presents dated lender-training sessions with recognizable previews and topic summaries.

07 / Client Control

Easy for IMB™ to Keep Current

One Workbook, an Hourly Refresh

IMB™ maintains its lender data in one familiar Google workbook. Routine updates go directly into the sheet, and the portal refreshes hourly. The team can keep information current without learning WordPress or sending each change through a developer.

IMB™ Updates the Workbook → Hourly Refresh → Updated Portal Information

A Cohesive Brand with a Stronger Sense of Stability

Danielle extended IMB™'s established logo and brand guide across the website and portal, later adding deeper brand colors to convey stability and reassurance. Shared styling helps the public recruiting experience and the member workspace feel like parts of the same organization.

What Changed for IMB™

Lender information is organized into searchable, comparable views. Published resources and earlier chat discussions can be found together. IMB™ can maintain routine lender data in a single workbook, with updates reflected in the portal hourly.

Recorded Tool Use

Microsoft Clarity recorded the following sessions during September 14–October 13, 2026:

88 / Program Search

52 / Lender Comparison

23 / Policy Matrix

Sessions including each page • Microsoft Clarity • September 14–October 13, 2026

Counts may overlap and include staff or demos; they are not unique-member totals. They document activity, not measured gains in time saved, satisfaction, recruiting, or production.

Client Context: A Production Milestone

IMB™ ranked #1 among Colorado-headquartered mortgage brokerages by Colorado loan volume and units, for 2026 year to date through September 9, 2026.

Source: RETR data supplied by IMB™; Colorado production among Colorado-headquartered mortgage brokerages, 2026 YTD through September 9, 2026.

This milestone describes IMB™'s business at that time; it is not a measured result of Poket's work.

Ongoing Support as IMB™ Evolves

Poket continues to support IMB™ through website updates, brand guidance, marketing development, and portal improvements. The work includes navigation and search refinements, lender-information updates, and training resources as the brokerage's needs evolve.

What's Next

The next phase is a targeted recruiting campaign using Meta advertising, supported by a Denver landing page, portal demonstration content, and campaign tracking. The campaign is getting started; performance results are not yet available.

Built Around Your Brokerage's Needs

IMB™'s case shows how a brokerage's recruiting story, member tools, and individual loan officer websites can work together. How can an efficient approach to your brand, recruiting, and daily work scale your business?

Poket Marketing helps mortgage brokerages connect recruiting websites, member platforms, and individual loan officer websites around their brand and team's needs.



Danielle Engel, Founder

Poket Marketing
danielle@poket.marketing
(720) 376-2880 • poket.marketing