REVISED BRIEF / MANAGEMENT WORKING DOCUMENT

A lighter role. A stronger connection.

Positioning

An established professional facilitates a permitted relationship between a willing client or employee and IIMBC. Existing practice comes first. IIMBC coordinates lending expertise, approved information and optional events. Transaction-based participation remains subject to individual legal clearance.

Confirmed design choices

Fixed transaction fee OR fixed basis-point commission; optional prospective performance progression; no discretionary spending; personal-use and approved client swag; optional company-coordinated luncheons and group events; partner dashboard reused as the AE dashboard.

Changes from the earlier recommendations

Remove paid launch stipends, territory building, cold-outreach expectations, sales auditions, discretionary operating allowances, recurring event quotas and a career-ladder emphasis. Do not add benefits or tools that have not been approved. Keep brief necessary orientation, actual-work records and professional permissions.

Implementation order

First establish lawful duties and transaction compensation for each participant. Then enable a simple request process, one coordinator and a clear handoff route. Publish the revised literature after confirming available items, event capacity, dashboard modules and signed terms.

The following pages are a design brief and 25 revised suggestions. They do not claim that portal functions have been built or that a proposed pay plan is legally activated.

PARTNER DASHBOARD = AE DASHBOARD

One workspace. Requests first.

Proposed navigation and workflow for the existing partner portal. This PDF is a specification, not a live dashboard.

Overview	IIMBC contact, access status, pending requests and latest program update.
Marketing	Approved pieces, permitted share links and a marketing-support request.
Program information	Role guide, signed pay plan, approved scope, policies and short training.
Swag	Personal or client purpose, requested items, quantity, delivery and status.
Luncheons	Audience, topic, preferred date, headcount, venue and IIMBC coordinator.
Group events	Employer sessions, client groups or other gatherings, with event-specific approval.
My requests	One timeline for comments, approval conditions, ordering, scheduling and fulfillment.
Compensation - optional	Private ledger and legally activated prospective tier information; no open borrower files.

Control design: AE sees only their own requests and necessary permitted status. IIMBC staff approve, commit costs and fulfill. No spending balance or autonomous ordering. Until modules are enabled, use the fillable request forms and designated secure channel in the management guide.

25 HIGH-VALUE IMPROVEMENTS / LITERATURE & FIT

Make the invitation fit.

01 Lead with the existing relationship

Use "A trusted name. A thoughtful introduction." Keep the invitation centered on the professional's established practice and the client's experience.

02 Create profession-specific inserts

Add one-page versions for attorneys, accountants, insurance professionals, advisors, Realtors and employers. Explain the relevant client need and the required professional permission.

03 Show branding in ordinary life

Use natural photographs of a notebook at a desk, drinkware in an office and a duffel in transit. Identify merchandise concepts without implying guaranteed inventory.

04 Add a client-facing explanation

Create a short, approved "What happens when you meet IIMBC" piece: who calls, what the lending team handles and how the client controls participation.

05 Publish verified service stories

Use permissioned, anonymized cases demonstrating responsive lending expertise. Describe the lending team's work without implying that an AE handled regulated tasks.

06 Prepare an employer edition

Offer a voluntary homeownership-access invitation, a group education option and a private route to IIMBC. Keep loan status and financial details away from the employer.

07 Use a brief fit conversation

Replace a sales audition with a short discussion of the person's existing business, audience, professional restrictions and preferred degree of involvement.

08 Keep orientation short and practical

Use a concise role guide, permission checklist and a few realistic handoff examples. Record paid required training without creating a weekly meeting burden.

25 HIGH-VALUE IMPROVEMENTS / CLIENT EXPERIENCE & RESOURCES

Make participation easy.

09 Offer a client-controlled contact route

Let an interested client initiate contact through an approved IIMBC channel. Record source attribution without requiring the AE to collect application or financial information.

10 Make permissions easy to document

Use a simple, counsel-approved consent and compensation-disclosure process appropriate to the profession. Keep permissions separate from any loan application.

11 Name one IIMBC relationship contact

Give each AE one coordinator and a backup. The coordinator handles request logistics and routes lending questions to appropriately licensed staff.

12 Send one useful handoff confirmation

Confirm receipt, assigned contact and the next expected step. Offer optional notifications instead of repeated check-ins or pressure to chase the client.

13 Use a restrained swag collection

Start with a few well-made choices: duffel, notebook, tumbler and mug. Confirm actual cost, quality and supply before publishing a catalog or promising delivery.

14 Separate personal and client requests

Ask who will use each item and why. Apply independent approval and distribution rules; keep swag unrelated to referral thresholds or commission tiers.

15 Give requests a clear status

Display submitted, under review, information needed, approved, scheduled/ordered and fulfilled. Include a coordinator note and expected next update.

16 Create three optional event formats

Offer a small client brunch, an employer education session and a larger group introduction. IIMBC reviews and coordinates each specific audience, agenda and cost.

25 HIGH-VALUE IMPROVEMENTS / EVENTS, DASHBOARD & CONTROL

Make the program dependable.

17 Build a useful topic menu

Provide approved topics such as preparing for homeownership, understanding financing options and planning a future purchase. A licensed presenter handles borrower-specific questions.

18 Supply the invitation and follow-up

After approval, IIMBC supplies the event invitation, reminders and general follow-up. Each attendee independently opts into any private lending discussion.

19 Make the dashboard calm

Lead with the program contact, approved materials and a prominent request action. Avoid daily sales targets, leaderboards and loan-file tasks for the limited role.

20 Use one request center

Provide tailored forms for swag, luncheons, other events and marketing help. Route requests to IIMBC; no wallet, card balance or self-authorized spending.

21 Keep program information current

Show the signed role, approved compensation schedule, enabled tools and current policies in one place. Retire outdated versions and notify only affected participants.

22 Offer a plain-language pay ledger

Show eligible transaction ID, locked fee or bps, attribution, earning status and payroll date. Explain pending items without exposing unnecessary borrower information.

23 Show prospective progression clearly

Once legally approved, display the current tier, measurement period and next-quarter threshold. Keep the rate locked for existing matters and avoid earnings promises.

24 Resolve duplicate attribution early

Acknowledge source and any existing Company matter when information arrives. Use a documented dispute process so neither professional relationships nor earned pay depend on memory.

25 Keep permission review individualized

Route each profession, firm and jurisdiction through the appropriate legal review before activation. Recheck when a license, firm, duty, compensation plan or work state changes.