

## COMMITTEE IDENTITY

### COMMITTEE NAME:

Business Growth & Scaling Committee

### STRATEGIC IDENTITY:

The Builders of Sustainable Broker Businesses

Independent mortgage brokers succeed when their businesses are not only productive, but durable.

The broker channel attracts entrepreneurial originators, but many operate without the operational structure necessary to scale effectively. Rapid growth without discipline creates instability, compliance risk, and operational breakdown.

This committee exists to strengthen the operational maturity of the broker community.

Its role is to help broker owners move from:

Producer → Operator → Leader.

The goal is not simply growth.

The goal is **sustainable, profitable, operationally disciplined brokerages.**

## COMMITTEE MISSION

The Business Growth & Scaling Committee exists to help independent mortgage brokers grow responsibly by developing resources, frameworks, and educational programming that strengthen brokerage operations, leadership development, and financial sustainability.

The committee focuses on the systems, strategies, and leadership practices that allow brokerages to expand without sacrificing compliance, culture, or customer experience.

## SCOPE OF RESPONSIBILITY

The committee operates in four primary domains.

### Brokerage Growth Education

Develop resources that teach brokers how to scale teams, operations, and production capacity.

### Operational Maturity

Promote operational frameworks that help brokerages manage staffing, compliance, marketing, and financial management.

### Leadership Development

Provide guidance that helps broker owners transition from loan originators to effective business leaders.

### Industry Knowledge Sharing

Capture and share successful practices from high-performing brokerages.

# STRATEGIC OBJECTIVES & OPERATING PRINCIPLES

The Business Growth & Scaling Committee operates with three core strategic objectives.

## Improve Brokerage Operational Maturity

Brokerages should understand the systems required to scale responsibly.

## Reduce Business Failure Risk

Many brokerages struggle with operational instability during growth. Education and shared experience reduce that risk.

## Strengthen Broker Leadership

Broker owners must evolve from production-focused professionals into capable leaders and operators.

## Operating Principles

Committee members operate according to the following principles.

### Practicality First

Education must focus on actionable guidance rather than theoretical business advice.

### Peer Learning

The most valuable insights come from experienced brokers who have navigated growth challenges themselves.

### Operational Discipline

Growth should never come at the expense of compliance or professional standards.

### Broker Movement Alignment

The committee's work must strengthen the long-term credibility and stability of the broker channel.

# LEADERSHIP STRUCTURE

Each committee follows the standard AIME committee leadership structure.

## Committee Chair

The Chair provides strategic leadership and ensures the committee executes its charter and annual objectives.

### Core Responsibilities Include:

- Lead committee meetings and set agendas
- Define and track committee goals
- Ensure delivery of committee initiatives
- Coordinate with AIME leadership and other committees
- Represent committee progress in board updates
- Identify risks or opportunities affecting committee work

The Chair is accountable for the committee's outcomes.

## Committee Vice Chair

The Vice Chair supports execution and continuity.

### Responsibilities Include:

- Assist with initiative development
- Track project progress and timelines
- Support committee member participation
- Lead meetings when delegated
- Prepare for future leadership roles

The Vice Chair serves as a leadership development pipeline role.

## Committee Members

Members contribute expertise, execution support, and industry perspective.

Members are expected to contribute actively rather than observe.

### Responsibilities include:

- Attend committee meetings regularly
- Participate in discussions and initiatives
- Contribute industry insights and best practices
- Support the development of committee resources

# COMMITTEE COMPOSITION

Ideal committee members include professionals with experience in:

Brokerage ownership

Mortgage operations management

Compliance and regulatory management

- Mortgage marketing and growth strategy
- Financial management for brokerages

Members should represent a mix of emerging and highly experienced brokerage leaders.

# OPERATING CADENCE & REQUIRED OUTPUTS

## Meeting Frequency

Committee meetings occur every

**3 to 4 weeks.**

## Reporting Structure

- Monthly update to AIME leadership.
- Quarterly KPI reporting for Board review.
- Annual strategic planning alignment with the Board in November.

## Required Outputs

The committee must produce three types of outputs.

### Quarterly Deliverable (QD)

A major resource designed to strengthen brokerage operations.

#### Examples include:

- Brokerage Scaling Playbook
- Hiring and Team Development Guide
- Mortgage Operations Framework
- Profitability and Cost Management Guide

### Monthly Visibility Action (MVA)

Public-facing actions that contribute to industry education.

#### Examples include:

- Broker case studies
- Educational videos
- Newsletter articles
- Business growth discussions

### Monthly Report

#### Report should include:

- KPI progress
- Initiative status
- Committee engagement metrics
- Risks or barriers to execution
- Strategic recommendations

# 2026 EXECUTION PLAN

## Q2 2026 - Foundation

### Scaling With Structure

- Develop the Brokerage Scaling Framework
- This framework will outline key stages of brokerage growth and the operational requirements associated with each stage.
- Identify operational challenges faced by brokerages during rapid growth.
- Develop educational resources focused on staffing, compliance, and operational systems.

#### KPIs

- Scaling Framework completed
- Operational challenge survey conducted
- Initial educational content published

## Q3 2026 - Visibility

### Industry Education

- Deliver business growth programming at FUSE.
- Host sessions focused on operational scaling strategies.
- Share case studies from high-performing brokerages.

#### KPIs:

- 2 FUSE sessions delivered
- High engagement scores from attendees
- New collaboration with at least one other committee

## Q4 2026 - Permanence

### Institutional Knowledge

- Develop a Brokerage Operational Benchmarking Report.
- Identify key trends affecting brokerage growth.
- Present 2027 strategic priorities to the AIME Board.

#### KPIs:

- Benchmarking report completed
- Strategic recommendations delivered
- 2027 goals finalized in November

# KPI FRAMEWORK

## Leadership KPIs

### Chair

- 90 percent charter execution rate
- 100 percent meeting cadence maintained
- Monthly reporting completed
- At least one cross-committee collaboration each quarter

### Vice-Chair

- 95 percent task execution reliability
- Support continuity and member engagement
- Assist with initiative execution

### Members

- 75 percent meeting attendance
- One meaningful contribution per quarter
- 90 percent task completion rate

## Committee Specific KPIs

### Brokerage Education Engagement

Number of participants in committee educational initiatives.

### Operational Framework Adoption

Brokerages implementing committee-recommended frameworks.

### Event Participation

Attendance at committee-sponsored sessions.

### Industry Insight Contributions

Case studies, reports, or operational frameworks produced.

# REPORTING TO LEADERSHIP

## Quarterly reports should include:

- Deliverables completed
- KPI progress
- Engagement metrics
- Contributions to FUSE programming
- Strategic insights from the brokerage community
- Risks affecting the broker channel

## Board reports should summarize:

- Objectives vs results
- Industry education impact
- Operational insights
- Next-quarter priorities

# SUCCESS DEFINITION

The Business Growth & Scaling Committee succeeds when:

- Brokerages become more operationally mature.
- Industry knowledge about brokerage management improves.
- Broker owners grow beyond production roles and develop strong leadership and operational systems.
- The broker channel becomes not only larger, but also more stable and professionally managed.