

Built to Scale. Backed by Trust. Guided by Process.

How **Intermountain Business Lending (IMBL)** used the Summit Success Process to serve smarter and grow with confidence

EXECUTIVE SUMMARY

In a market where the status quo is no longer enough, IMBL chose to break the mold.

With rising loan volume goals and a deep commitment to personalized borrower experiences, IMBL needed more than a technology vendor—they needed a partner. Guided by mysherpas, IMBL re-imagined its lending operation through a security-first, client-obsessed transformation.

Using the Summit Success Process, mysherpas delivered more than just a modern tech stack.

They helped IMBL reduce manual document handling by 80%, accelerate time from application to close by 30%, and eliminate compliance concerns—while replacing five disconnected systems with one streamlined platform.

This wasn't a one-size-fits-all software roll-out. It was a low-risk, high-trust climb designed around IMBL's needs. Now, IMBL is positioned to scale with confidence—serving smarter, moving faster, and putting trust at the center of every interaction.

BACKGROUND

IMBL based in Ogden, Utah, has been a trusted and reliable SBA lending partner to small businesses since 1979. Following a record-breaking year in 2023 with 62 loans funded and \$73M in volume, IMBL doubled down on an ambitious growth strategy: helping 50 new businesses in 2025, 75 in 2026 and 100 in 2027—tripling their FY24 volume within three years. Already ahead of pace toward their 2025 goal, IMBL knew they needed to think differently about scaling by leveraging smarter technology, not adding more headcount, without sacrificing the borrower experience.

To meet these rising expectations and evolving borrower needs, IMBL knew they had to **modernize** their internal processes and tech stack **without losing the personal touch** that defined their legacy.



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CHALLENGES

The lending landscape, particularly in SBA lending, is more competitive than ever and maintaining IMBL's reputation for exceptional borrower experience was non-negotiable. Staying ahead of the curve required more than just hard work, it demanded smarter, more strategic use of technology. To meet their goals and continue outperforming competitors, IMBL recognized they needed a scalable, high-touch solution that could evolve with their business needs.

They needed more than just a platform, they needed a partner to help them scale with speed, precision and confidence.

Key needs identified included:

- Improve the borrower and external stakeholder experience across the loan lifecycle, from lead to servicing.
- Implement flexible, configurable technology that supports consistency regardless of loan file dynamics.
- Consolidate their tech stack to bring communication, collaboration, and source documentation into one place.
- Ensure the technology could be easily trained on and adopted to meet FY27 loan volume goals.

In FY24, IMBL approved 32 loans totaling \$28.4M. Their FY25 trajectory is even more ambitious, with a goal to double the number of small businesses served by FY27—all supported by a lean 15-person team.



THE SHERPA ADVANTAGE: SUMMIT SUCCESS PROCESS

In an industry where implementations and adoption of technology often falter due to vendor's application of a one-size-fits-all approach, as well as a host of other reasons, IMBL sought a partner who would truly listen and tailor solutions to their unique needs.



Step 1: Map the Route

Key Meeting: Discovery Call

Every journey starts with an accurate map. In a fast-paced 45-minute discovery session, we identify the key tools your team uses, workflows established, and team dynamics that matter most.

- Tools you rely on
- Process pain points
- Key players on the climb

You walk away with a game plan—and momentum.



Step 2: Inspect the Gear

Key Meeting: Guided Assessment

Next, with our tech and lending guides we dig deep into your lending operations, typically a 90-minute session. We get tactical to determine what is working, what's not, and where the opportunity lies.

- Current tech stack
- Lending process and day-to-day bottlenecks
- Team collaboration and methods for scaling to meet loan volume goals

We make sure to document your current lending process and identify what will be required to scale the summit.



Step 3: Test the Fit

Key Meeting: Report and Tailored Demo

This is where strategy meets real-world workflow. Our assessment report and tailored demo show exactly how **mysherpas.ai** fits into your environment and solves your pain points, typically a 60-minute session.

- Live system walkthroughs
- On-boarding acceleration
- Tailored cross-functional improvements

It's not theoretical. It's personalized, powerful, and proven.



Step 4: Final Check

Key Meeting: Formal Proposal

We align every team member, inspect every tool and consider every path to the summit.

- Review findings
- Final questions
- Decision clarity

With clarity and confidence, your team is ready to scale.



The Summit Success Process created total buy-in across our lending team. The clarity and structure gave everyone—from operations to closers—a shared roadmap. We didn't just get a new tool; we got a smarter way to work together."

IMBL Lending Operations Manager

RESULTS

Quantitative Wins:

80% drop in manual document handling

30% faster time from application to close

Zero compliance flags during audit

Qualitative Impact:

- Greater role clarity and team buy-in
- Team members freed from file-chasing
- Leadership alignment across departments

Through the Summit Success Process, we confirmed that mysherpas could streamline IMBL's workflows, centralize their tech stack, and support their long-term goals with documented, repeatable processes.



Before mysherpas, our team was juggling multiple systems to manage one loan file. Now, everything is centralized—saving time, staying compliant, and serving borrowers more efficiently than ever."

IMBL SVP and Loan Officer

SOLUTION

The strategic partner IMBL needed was mysherpas. IMBL leveraged the power of **mysherpas.ai**, combined with a high-touch, approach of the Summit Success Process, to streamline operations, empower their team and unlock smarter workflows from day one.

Before mysherpas, IMBL relied on MS Office, Ventures+, Outlook (Email), FileInvite and ShareFile to manage documentation and workflows. This fragmented approach created inefficiencies and gaps in communication and document control.

mysherpas not only consolidated the tech stack—trimming it down from five vendors to three—it also brought clarity, consistency, and a future-ready foundation to their lending operation.