Audit & Recommendations

THE KALLI COLLECTIVE LLC

CONSULT & COORDINATE

WEBSITE

135 /month

Website Visitors
300 INDUSTRY AVG.

According to Advisorpedia 300 monthly visitors is average for the financial industry. Website traffic correlates to your reach and your audience's engagement with your content. **Your traffic is below average.**

- Optimizing for search engines will increase organic search traffic
- Advertise on Google
- Advertise content on social platforms

32 s

Avg. Visitor Time
2-6m INDUSTRY AVG.

Visitor duration on financial planning websites typically ranges from 2-6 minutes, with longer sessions indicating strong engagement and effective content. **Your rate is below average.**

- Create engaging, helpful, and trust-building content
- Optimize key pages for visitor attention
- Optimize calls-to-action

TOP 5 PAGES

1. Home
2. Client Login
3. Services
4. About
5. Contact

HARDWARE USED

web / desktop	346
web / mobile	38
web / tablet	4

KalliCollective.com 931-774-0090 info@kallicollective.com

WEBSITE

ANOMALY DETECTED

Spike in Users on 2024-02-18

Expected **40** Actual **431** ↑977.5%

18 - 24 Feb

Active users **431**

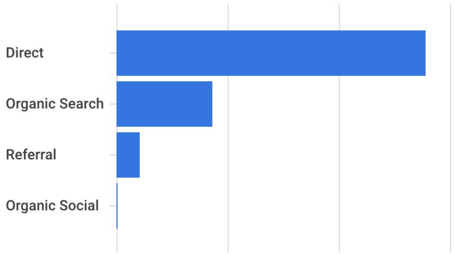
Did you advertise in February?

What percent of clients are outside of CA?

USER LOCATION

CITY
Columbus
San Jose
New York
Boardman
Ashburn
Moses Lake
Oakland

WHERE TRAFFIC COMES FROM



SITES TRAFFIC COMES FROM

google
bing
napfa.org
connect.xyplanningnetwork.com
cal.crm.dynamics.com
eastbayadvisorsnetwork.com
sharingyourinput.com

Make sure your profiles are optimized.

EMAIL

91%

EMAIL OPENS
27% INDUSTRY AVG

Email opens indicate the efficacy of your email subject and not getting marked as spam. **Your rate is above average.**

- Continue using similar email subjects
- I've never in my life seen open rates this high, which makes me question the accuracy of the stats

1.9%

EMAIL CTR
10% INDUSTRY AVG

The click-thru rate indicates your audience's interest in your email content. **Your rate is below average.**

- Align your content to better resonate with your audience's preferences
- Many of your emails do not contain buttons to click, which skews conclusions

4%

Mentions/Replies
6-8% INDUSTRY AVG

Client mentions and email replies indicate your client's engagement with your email content. **Your rate is below average.**

- Add personal elements to your emails

SOCIAL CONTENT

0%

Facebook Follower Engagement Rate

Average Facebook engagement rate for financial services is .05%
Engagement rate with your followers correlates to your reach and your audience's engagement with your content. **Your rate is below average.**

- Align your content to better resonate with your audience's interests.
- Advertise to increase reach & engagement
- 257 followers

<1%

LinkedIn Engagement Rate

Average LinkedIn engagement rate for financial services is 2.5%
Engagement rate with your followers correlates to your reach and your audience's engagement with your content. **Your rate is below average.**

- Engage with others weekly
- Post consistently
- Create a business page & advertise to increase reach & engagement
- 500+ connections

FYI
You do not have a LinkedIn business page, only a profile

No Data

Google Business

Recommendations

EXISTING OPPORTUNITIES

Highlight media appearances from PR

Update photos on website to match ideal client avatar

Update account descriptions from “you” to “they”

Interact weekly with connections on social media

Add personal content (prove you’re not a bot)

Add photos to Google Business

OVERVIEW

OBJECTIVES

- Increase AUM from 10% to 16% // 5-10 new clients // $10M NNA
- Attract ***ideal*** clients
- Create credibility & social proof online
- Create a Prospect Process: Establish an organized, repeatable process for engaging prospects and converting them into committed clients, with a focus on building long-term relationships.
- Increase Business Valuation: By improving marketing efforts and creating a clear process for attracting and retaining clients.

METHODS

Refine brand

Update website and collateral to match updated brand

Create customized content that fits audience needs

Map client journey and create automated touchpoints at each stage (including acquiring testimonials)

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PHASES

PHASE 1	PHASE 2	PHASE 3	PHASE 4
REVAMP & SETUP	**DEVELOP**	**IMPLEMENT**	**MONITOR & ADJUST**
➢ Update brand & accounts ➢ Map out client journey ➢ Create video library	➢ Build out the sequences according to the map ➢ Revamp website	➢ Create first lead magnet & ads ➢ Start creating content customized for your ideal client	

PHASE ONE

- Revamp Brand
  - Create & develop guidelines of what you want people to see, think, hear, feel
  - Update client avatar
- Email & Automations
  - Map out your client journey & touch points
    - From aware to advocate
- Create video library
  - What a confidence-building financial partnership looks like with Focused Finances
  - Advisor’s story, why she helps, and how she helps
- Online Presence
  - Create LinkedIn business page
  - Update & optimize LinkedIn profile
  - Update & optimize Facebook business page
  - Update Google Business
  - Create YouTube

PHASE TWO

- Revamp Website
- Develop Automations in Levitate based on maps from Phase 1
  - Prospect Drip Campaign//Nurture Sequence Creation (automations & documents)
  - New Client Onboarding Sequence (automations & documents)
  - Documents, touchpoints, and automations for meetings

PHASE THREE

- Create first lead magnet & ads
- Start new content that follows brand guidelines
    - Monthly blog, video, social posts, and email newsletters

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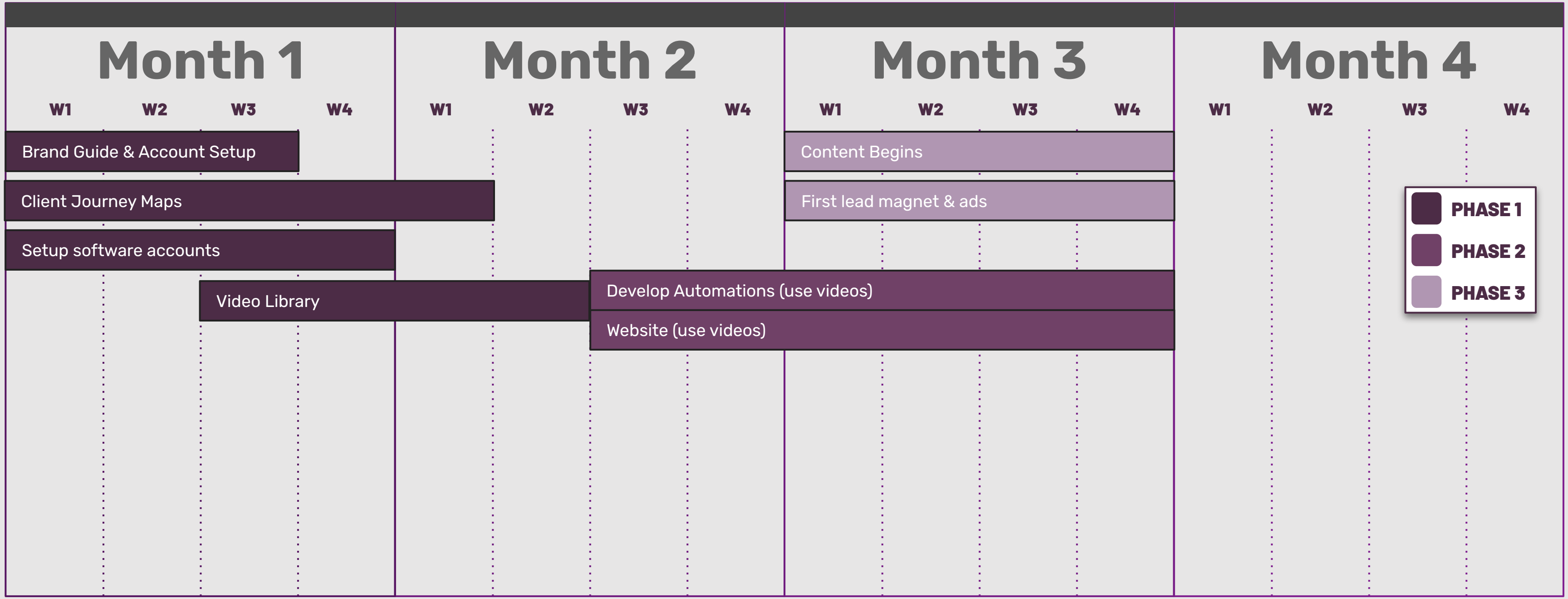
TIMELINE



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VENDORS

WHAT	WHO	ESTIMATE	CONTACT	NOTES
Brand Setup	Kalli Collective	$4,500 standalone OR Included with Full Monty Daring (pricing below)	https://kallicollective.com/services/marketing-done-for-you/setup/	Setup reduced by what has been completed during your consult & coordinate (-$1,000)
Content, Website, Nurture Sequences,	Kalli Collective	Full Monty Daring $10,000 set up $4,500 month	https://kallicollective.com/services/marketing-done-for-you/plan/#daring	Setup reduced by what has been completed during your consult & coordinate (-$1,000) Scripts & gear not included with our video editing - see below for pricing with video vendor for all-inclusive video services
Vendor Coordination	Kalli Collective			We can bundle vendor services into ours and coordinate for you if you'd like to keep one contact & one invoice
Email & marketing automation software				**Levitate support confirmed that you can send HTML emails. No need for a second platform.**
Turn-Key Remote Video	Idea Decanter	Video Library $5,995 Monthly Videos $1,697	Sam Hale sam@ideadecanter.com	If you would rather they filmed in person, rates start at $15,000

Proposed Edits

CURRENT IDEAL CLIENT

What keeps them up at night?: Concern that their situation is more complex than they have time to handle.

What makes them wake up in the morning?: A purpose in life and something interesting and fun to look forward to

What do they post about on social media?: Their family, travels, culture

How old are they?: 50-70

Are they in a relationship?: Married/Civil Union

Are they mostly male, female, or other?: Mostly female

Do they have children or grandchildren under 18 years old?: Sometimes

What do they do in their free time?: What free time? Nevertheless, concerts, cultural events, outdoor activities, volunteer work, staying fit and health

How do they earn income?: Employed

Please list any defined niches: no defined niche but people who are looking for a partner with expertise

PROPOSED IDEAL CLIENT

Demographics:

- **Age**: 50-70 years old.
- **Marital Status**: Mostly married or in civil unions.
- **Gender**: Predominantly female.
- **Employment Status**: Currently employed, balancing professional careers and personal responsibilities.

Challenges and Concerns:

- Find their financial situation complex and overwhelming.
- Struggle to find time to manage everything effectively.
- Likely experience stress or anxiety from balancing work, family, and financial responsibilities.

Motivations:

- Purpose-driven; they seek meaning in their personal and professional lives.
- Energized by new challenges and activities.
- Look for fulfillment through experiences, personal growth, and learning.

Values and Priorities:

- Family is central, balancing career with family commitments.
- Prioritize cultural enrichment, personal health, and community involvement.
- Passionate about volunteering, fitness, and maintaining a healthy lifestyle.

Social Media Behavior:

- Frequently share content related to family, travel, and cultural experiences.
- Likely to post about their journey toward balance, personal success, and self-improvement.
- Share tips on time management, self-care, and staying fit.

Lifestyle and Freetime:

- Have limited free time, but prioritize enriching, meaningful experiences when available.
- Enjoy concerts, outdoor activities, and cultural events.
- Participate in volunteer work and invest time in their health and fitness.

Income Sources:

- Employed, often balancing demanding careers with personal responsibilities.
- Typically work in industries that require professional guidance to manage life's complexities.

PRODUCT

What you're selling:

CURRENT

Comprehensive financial strategies and investment solutions that align with the client's life goals, financial situation, and personal values.

PROPOSED

A personalized, confidence-building financial partnership tailored to women aged 50-70.

The true "product" here is peace of mind, confidence, and partnership in managing life's financial complexities.

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