

KALEIDICO

Consumer Direct Lead Generation

Mortgage Lenders

Table of Contents

1. About Kaleidico
2. Lead Generation Programs
3. The Kaleidico Team
4. Recent Case Studies
5. Client References
6. Project Investments

HIGH *Quality* LEAD
GENERATION

KALEIDICO

Kaleidico boasts 15 years of delivering exceptional design, development, and digital experiences to the web. Our team's creativity and innovative thinking have consistently put our clients at the forefront of new trends and opportunities in an always evolving digital landscape.

In the next several pages we seek to showcase the processes and team members that consistently deliver the best web experience through exceptional design, development, and marketing operations.

As we discuss our approaches and philosophies, I'm confident that you'll quickly get a sense of our precision, performance-focus, and excellence.

Section One

About Kaleidico

Founded in 2005

Kaleidico is a digital agency with hard-working, straight-talking, Detroit-hustling marketing and development experts who can help you create a compelling, intuitive, informative, and engaging experience for your website visitors.

Over the past 15 years, our services have generated millions in profits for our clients and exceptional experiences for their customers.

Section Two

Lead Generation Program

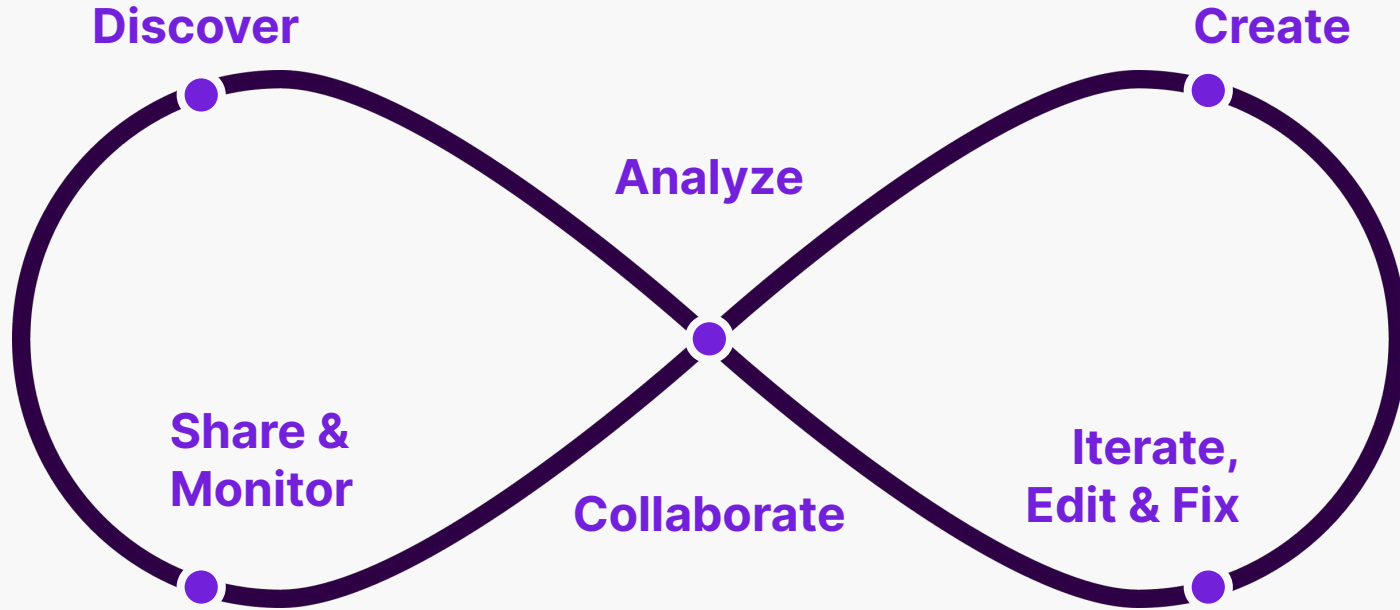
Leads Fuel Growth. We Know Lead Generation

Generating leads online is hard. Online user experiences - websites, social media, and email marketing - are rarely designed to generate sales leads. Yet, businesses are being forced to be digital-first.

Kaleidico has focused all of our attention and experience on generating online leads - for nearly two decades.

Kaleidico has developed a collaborative process, workflow, and set of proven best practices that consistently generate leads - fast, affordable, and consistent with your brand positioning.

Our Process



Outcomes

We always start with the lead.

Kaleidico has a uniquely long heritage of generating leads. Over the last 15 years we've generated leads for a variety of industries and through an ever changing digital ecosystem.

In 2003, when Kaleidico was incorporated, Google Ads was a novel marketing strategy and Facebook and Twitter didn't exist.

Our process is flexible, but disciplined and always focused on your delivering business outcomes.

SEO Strategy & Execution

We take care of all the marketing research and analysis, finding the keywords that your ideal prospective clients are searching and provide you with a detailed marketing analysis report.

Then we work to get your website ranking for those keywords and key phrases, all while weeding out irrelevant and negative terms.

This process involves an SEO and content marketing strategy working in tandem.

Content Marketing



Our content marketing programs are based in SEO research, competitive analysis, and the customer's buying journey.

Our process begins with the business objective - generating a specific mortgage lead type - and working backwards we develop content that will have a high probability of ranking, generating, traffic, and conditioning a high intent, educated mortgage client.

Our content program supports our SEO, email, and PPC strategies.

PPC Managed Services

We successfully manage and generate profitable lead programs using Google and Bing Ads in some of the most competitive and expensive online markets - Legal, Financial Services, and Senior Living.

Our PPC program for City National Bank would initially focus on brand searches and remarketing to capture searches from Bankrate and Zillow rate table traffic. Then we would work towards scaling into more mainstream keyword markets.

Email Capture & Lead Nurturing Campaigns



We would assume your prospective clients are intelligent, affluent people. They are intuitive and have done some research but likely have more questions before inquiring.

We would add email and lead captures to your website to build an email list for lead nurturing. A weekly newsletter will continue to support and guide your clients through the home buying to refinance process, leveraging content, even if they become cold or unresponsive during the sales process.

Lead gen workflow typically looks like:

Strategy -

collaborate to bring together business objectives and proven tactics.

Quarterly Plan -

outline and document detailed and specific lead generation plan.

SEO - deep analysis of market, competitors, and opportunities to position for page one on high-intent keywords.

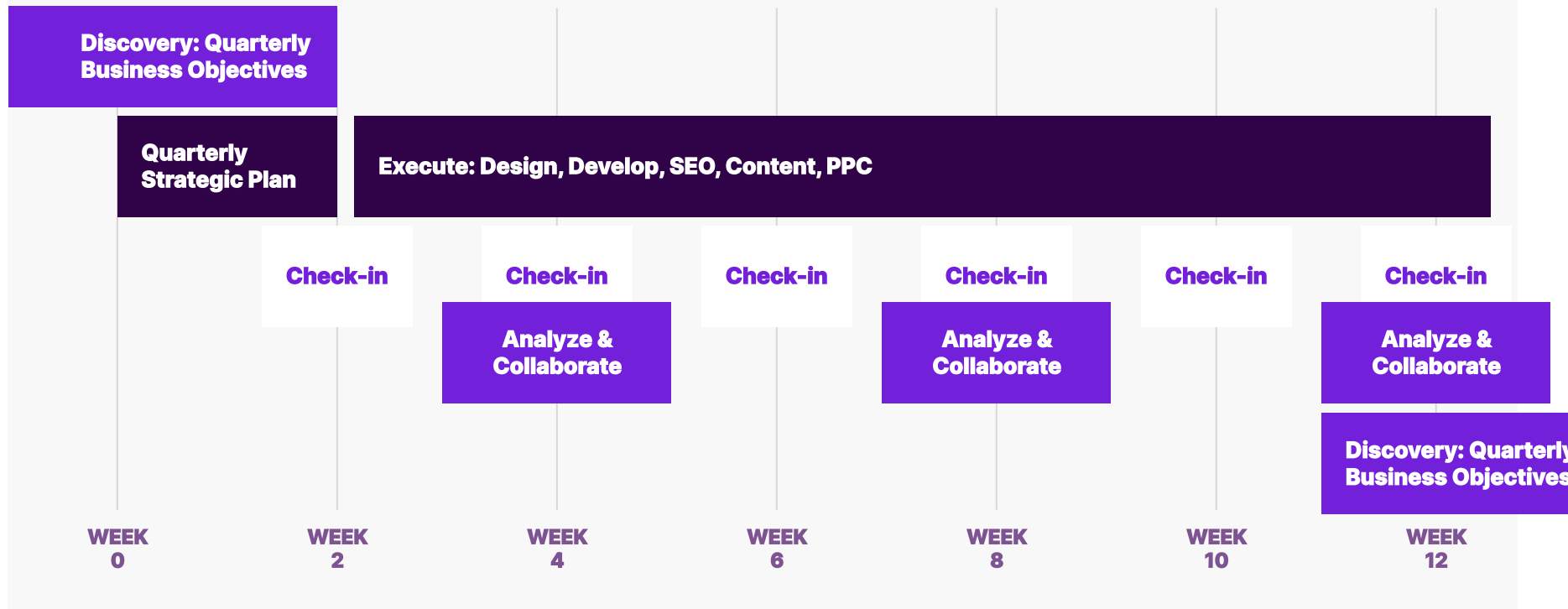
Content - expert content creators develop audience building and sales enabling content.

PPC - use proven PPC bidding and positioning strategies to get affordable clicks and lead conversions.

Analysis - collaborate to optimize and grow your competitive position online.

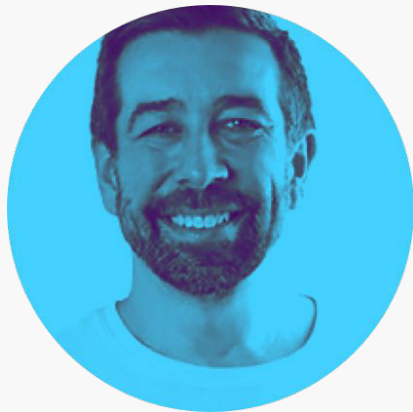
Reporting - use a consistent and proven set of KPIs to measure and guide our performance to ongoing growth and success.

Quarterly Lead Generation Rhythm



Section Three

The Kaleidico Team



Bill Rice

FOUNDER/CEO

BIOGRAPHY

20 years designing and building online consumer-direct mortgage lending platforms and market strategies.

- **DeepGreen Bank** – Home Equity instant online decision and Quick Cash (sold to LightYear Capital)
- **Lending Tree** – Collaborated in building their XML lead posting engine. Before that they faxed leads to lenders
- **Quicken Loans** – Built EquityOnline - another instant online decision, and ran National Home Equity
- **Kaleidico** – Began as icoSales the first mortgage lead management system. Competitor to Leads360 (now Velocify). Clients: IndyMac Bank, New Century, American Home Mortgage, all the large mortgage call centers

Our Account Team



Samantha Bell
Account Manager



Mika Kotanova
Account Manager

Our account management team brings the perfect blend of digital marketing strategy, project management, and execution to your business.

They will lead and continue to shape your lead generation program to your specific business objectives.

Project Leads



Nate Rapai
Creative Director
& Lead Designer



Angelo Marasa
Senior Web Developer &
Project Manager



Kelley Nowak
Business Development
& Client Success



Asia Rapai
Content Strategist
& Copywriter

Section Four

Recent Mortgage Lender Case Studies

Homefinity

Homefinity came to Kaleidico to transition them from a traditional branch-based mortgage lender to a consumer-direct digital mortgage company. Their previous website was built internally on a short timeline and didn't reflect their evolving brand.

Kaleidico worked with their team to launch a brand new digital platform that includes custom developed calculators, blog content, and mortgage rates. Since the site went live it has accelerated their business, shattering all historic benchmarks and records.

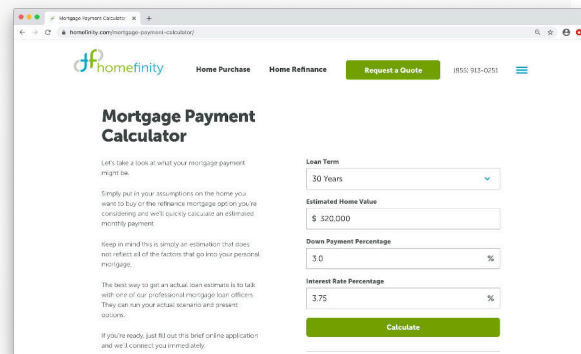
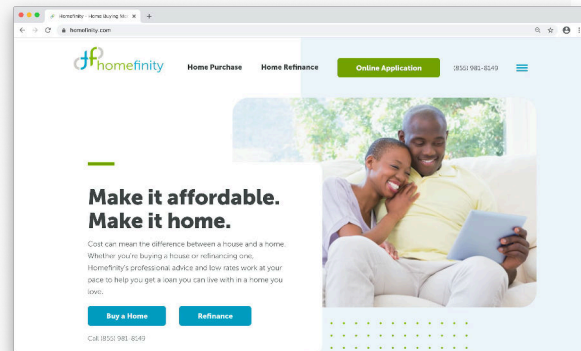
[Visit the website →](#)

Jessica Manna

President, Digital
Strategy & Innovation

561-702-0552

jessica.manna@fairwaymc.com



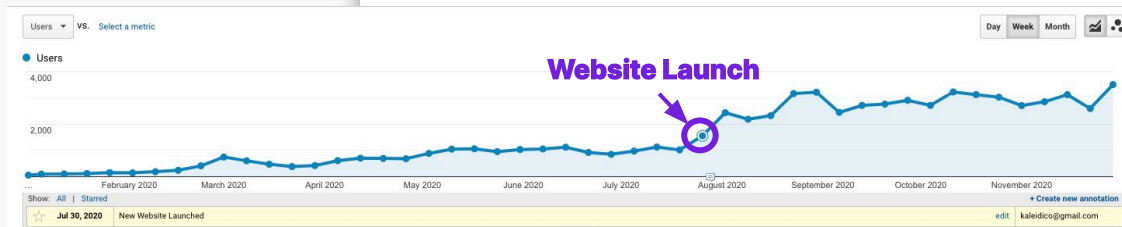
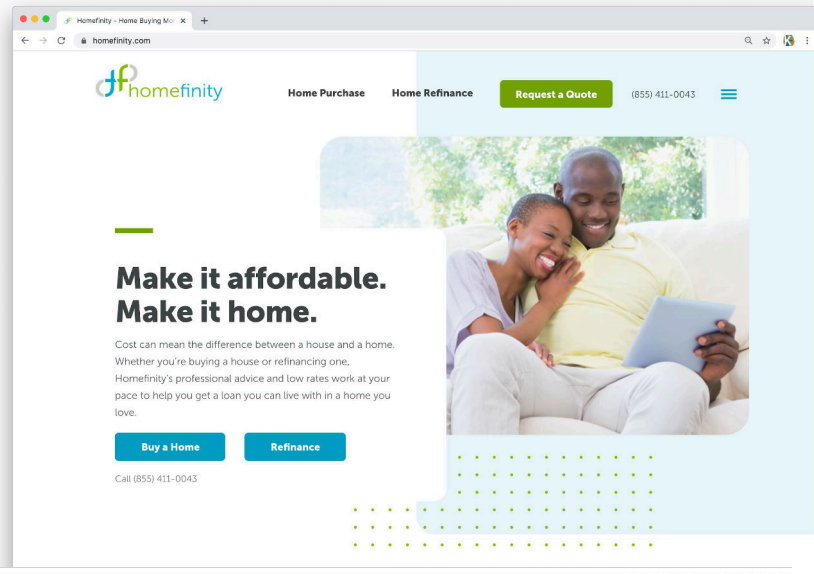
Case Study

Homefinity

Homefinity came to Kaleidico to transition them from a traditional branch-based mortgage lender to a consumer-direct digital mortgage company.

Kaleidico combined design, SEO, and content to launch a brand new lead generation platform that has since accelerated their business and shattering all historic benchmarks.

Visit the website →



River City Mortgage

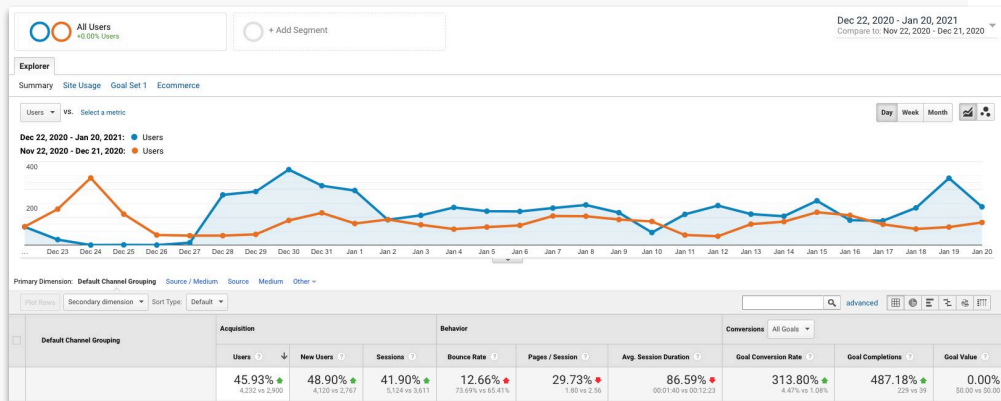
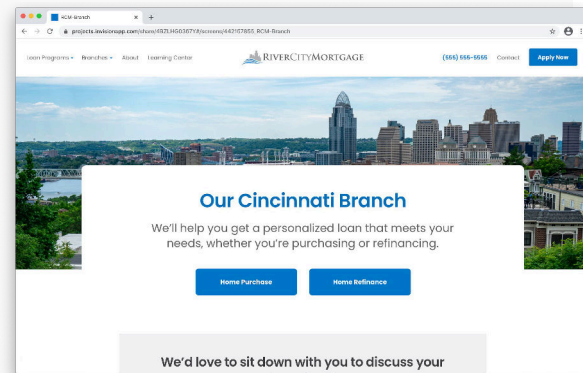
River City Mortgage, a traditional Midwest mortgage lender with multiple branches, was looking to grow its online mortgage marketing and consumer-direct mortgage lead generation.

River City Mortgage had unsuccessfully worked with other marketing agencies, but they never had the mortgage lending expertise to be effective. Kaleidico, with over 15 years of deep mortgage marketing experience, was a refreshing contrast. We came turn-key with proven strategies to generate mortgage leads quickly. No need for hand-holding or educating. We were able to immediately jump into crafting strategies and tactics to increase mortgage lead flow.

Our initial mortgage lead growth plan focused on three areas: sales process improvement, tactical website conversion optimization opportunities, and new traffic generation strategies to grow their online presence in the communities their branches serve and attract the customers they can best help.

Nick Hunter
President, COO

513-631-6400
nick@rchomeloans.com



Marquee Funding Group

Marquee Funding Group, a California private money lender, was looking to grow their owner-occupied mortgage lending with a consumer-direct mortgage marketing strategy.

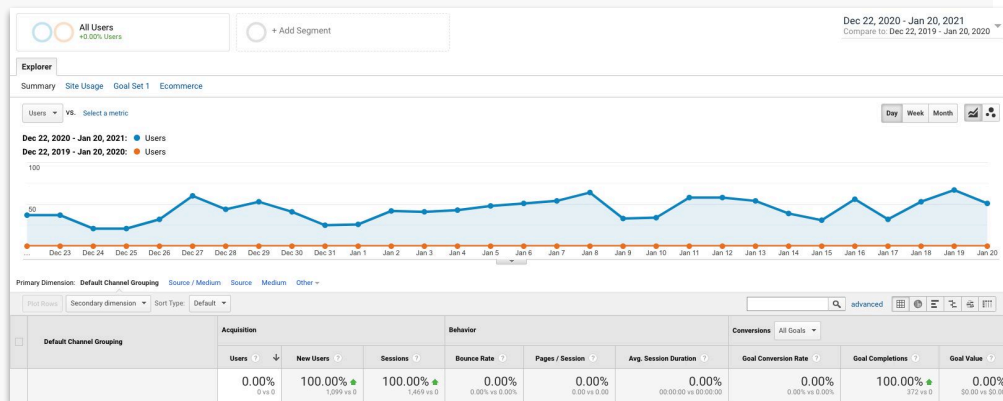
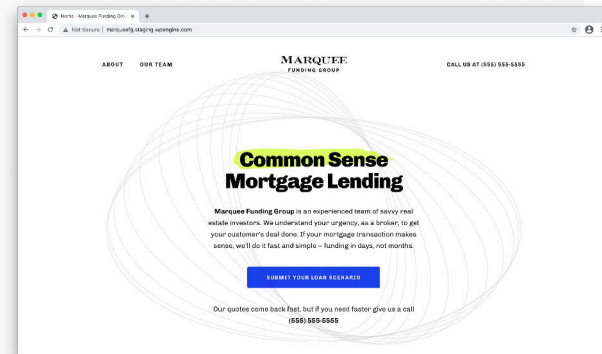
Marquee initiated a competitive search for an agency with mortgage marketing expertise and discovered Kaleidico's unit positioning and experience. We began our relationship with a limited, 30-day strategy engagement.

From this collaborative process, Marquee and Kaleidico developed a growth plan that included three areas of focus: sales process improvement, tactical website conversion optimization opportunities, and new traffic generation strategies to grow their online presence and customer audience.

New website coming this month →

RJ Solovy
President / Broker

818-222-5222
rjsolovy@marqueefg.com



TRUSTED BY



Section Five

Other Recent Case Studies

Detroit College Match

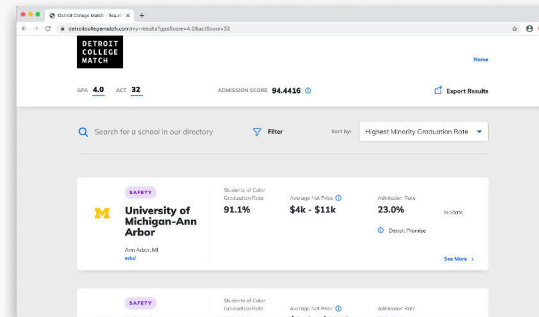
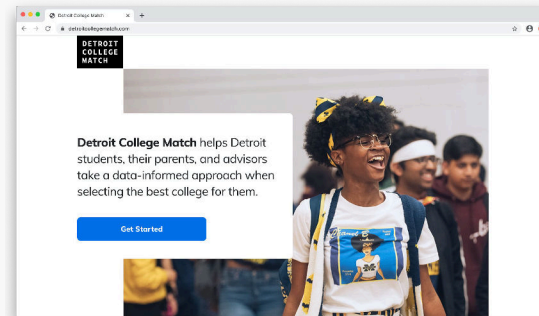
Students in the Detroit area have unique opportunities when applying to college. The students who typically go on to college have great GPA scores but test poorly on standardized tests.

To help these students, their parents, and advisors take a data-informed approach selecting the best college for them, Kaleidico partnered with DetroitCAN to move their previous excel document into an easily accessible web experience.

[Visit the website →](#)

Ashley Johnson PHD
Director of Detroit College
Access Network

313-600-1596
ajohnson@detroitcan.org



The Citizens Research Council of Michigan

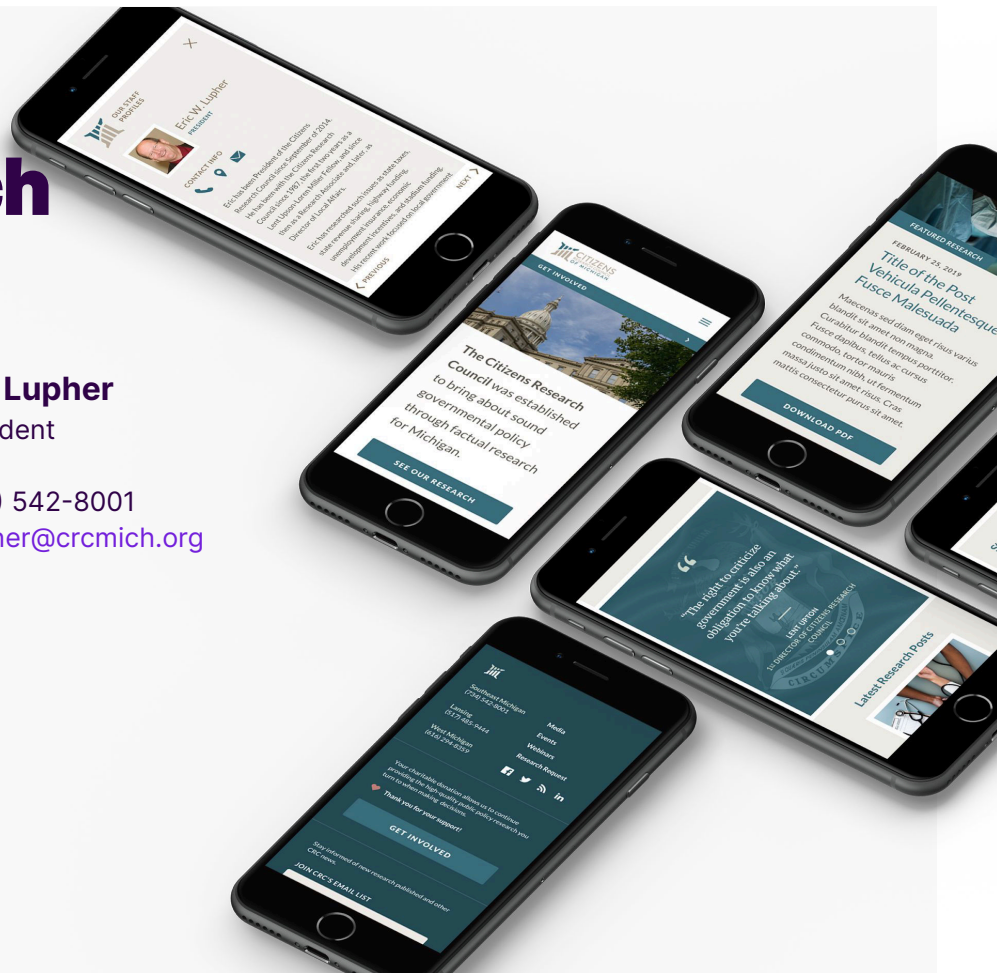
Citizens Research Council of Michigan, like many of our clients, had a website that had aged to a point of making it inaccessible to most of their web visitors - all using mobile devices. Making decades of policy research unusable to their customers.

Kaleidico, designed and developed a website that was not only beautiful, but worked beautifully for their customers.

[Visit the website →](#)

Eric Lupher
President

(734) 542-8001
elupher@crcmich.org



DECA Health

DECA came to Kaleidico to build a website design system and platform to support the efficient design, build, and launch of over 30 pain clinic websites across the nation.

Kaleidico designed and developed a custom theme and Wordpress platform that is built for flexibility and reusability as their business and locations rapidly expand.

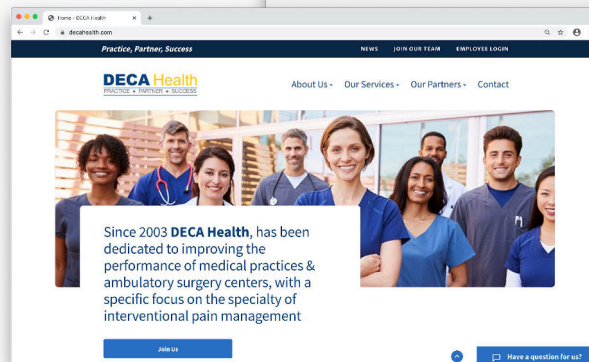
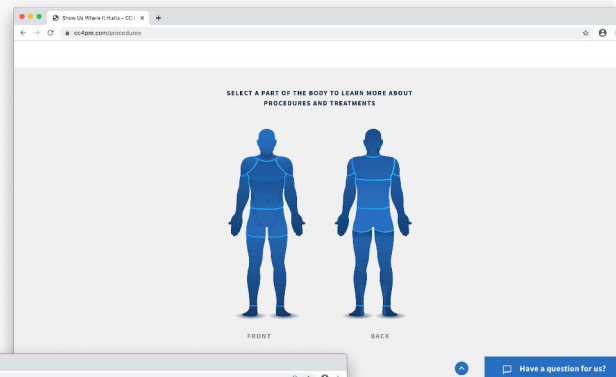
[Visit the website →](#)

Emilee McGaffey

Director of Marketing

(419) 843-1370 ext. 124

emcgaffey@decahealth.com



PIXO Apex

PIXO VR engages kaleidico for SEO, content, and landing page optimization design support.

Our efforts propelled them into a leadership position online for VR training and a variety of search terms and content related to VR content and target industries. Kaleidico has also assisted in a recent product and market position pivot.

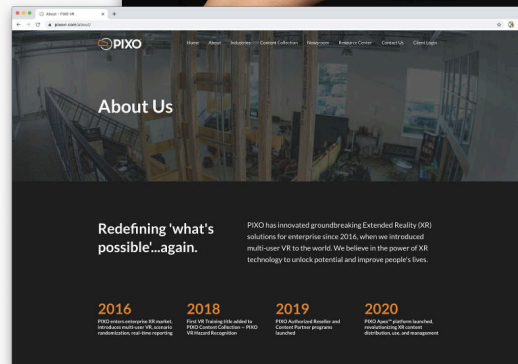
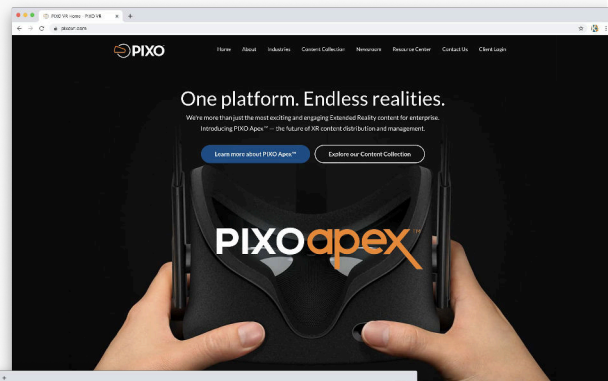
Visit the website →

Marco Maceri

Director of Marketing

(248) 996-8298

marco.maceri@pixovr.com



Censys

Kaleidico has been Censys' primary web development and digital marketing strategy and execution partner.

Our team has rebuilt their website twice as they have repositioned their product and market focus. We lead their paid advertising campaigns, from Google Ads to LinkedIn and support their very dynamic startup digital marketing needs.

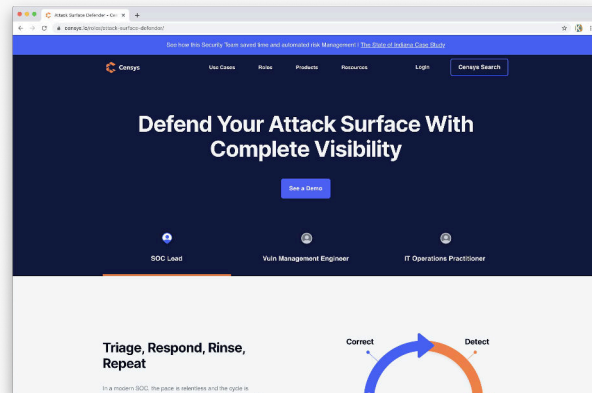
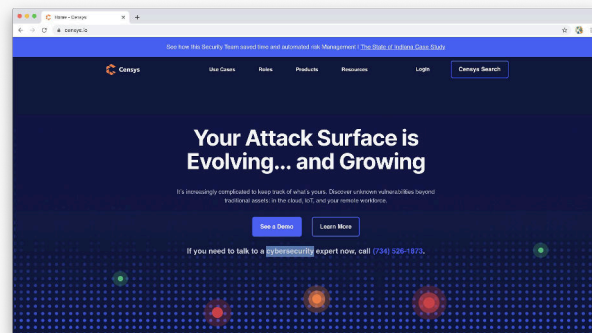
[Visit the website →](#)

Rachel Benson

Vice President of Marketing

(517) 402-4743

rachel@censys.io



Nutshell

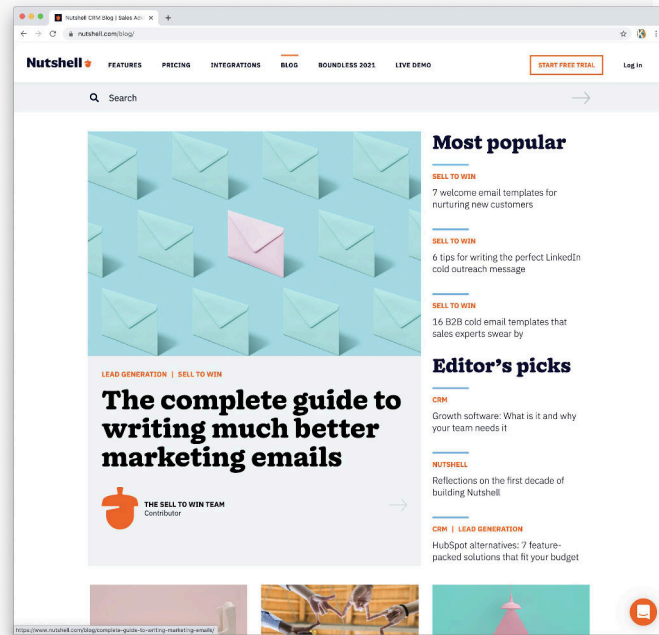
Nutshell engaged Kaleidico to develop a custom, heavily branded blog user experience.

This development project was focused on create several unique and custom features designed to increase engagement and lead generation and capture. Kaleidico continues to support this platform with custom feature development.

[Visit the website →](#)

Rebekka Kuhn
Brand Design Lead

rkuhn@nutshell.com



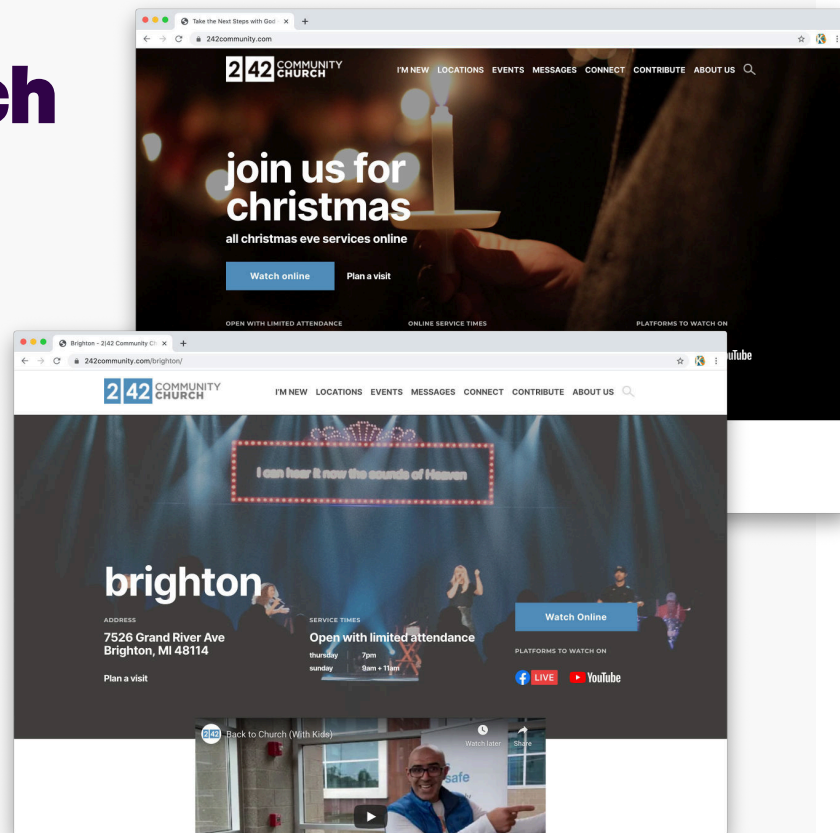
Case Study

2|42 Community Church

Kaleidico redesigned and developed 242community.com after a severely botched Wordpress redesign by another agency. Our expertise was enlisted during a critical moment as this large, multi-campus church moved to 100% online services, literally overnight.

Kaleidico continues to support 2|42 with design, development, and marketing services.

[Visit the website →](#)



Case Study

Emmett Plastic Surgery

Emmett Plastic Surgery ran through several *bargain* SEO agencies - never getting the outcomes they were promised. Instead, they were left with a disorganized mess of unintelligible SEO pages.

Kaleidico consolidated/rewrote one power page to gain immediate Google search ranking for their primary keyword, in a matter of weeks.

[Visit the website →](#)

Rankings Overview 1 - 100 (100) ⓘ

Buy more keywords		+ Add keywords	Actions	Positions	Estimated traffic	Visibility	All for denverfaceandbody.com				
	<input type="checkbox"/>	Keyword		Pos. Nov 28	Pos. Dec 4	Diff	Visibility	Diff	Est. traffic	Diff	URL
>	<input type="checkbox"/>	breast augmentation surgery		83	41	↑42	0.016%	+0.011	0.01	+0.01	https://www.denverfaceandbody.com/augmentation-surgery
>	<input type="checkbox"/>	top results breast augmentation pros and cons 2016		73	44	↑29	0.016%	+0.008	0	0	https://www.denverfaceandbody.com/augmentation-pros-and-cons-2016
>	<input type="checkbox"/>	breast augmentation reddit		51	29	↑22	0.023%	+0.009	0	0	https://www.denverfaceandbody.com/augmentation-reddit
>	<input type="checkbox"/>	breast augmentation near me		70	56	↑14	0.012%	+0.004	0	0	https://www.denverfaceandbody.com/augmentation-near-me
>	<input type="checkbox"/>	breast BBL and augmentation		72	59	↑13	0.011%	+0.004	0	0	https://www.denverfaceandbody.com/bbl-and-augmentation
>	<input type="checkbox"/>	reddit reddit augmentation		72	60	↑12	0.011%	+0.003	0	0	https://www.denverfaceandbody.com/augmentation-reddit
>	<input type="checkbox"/>	breast augmentation with reddit		47	40	↑7	0.017%	+0.002	0	0	https://www.denverfaceandbody.com/augmentation-with-reddit
>	<input type="checkbox"/>	looking reddit augmentation denver		13	8	↑5	0.096%	+0.058	0	0	https://www.denverfaceandbody.com/looking-reddit-augmentation-denver
>	<input type="checkbox"/>	can afford reddit reddit		16	11	↑5	0.055%	+0.022	0	0	https://www.denverfaceandbody.com/can-afford-reddit-reddit
>	<input type="checkbox"/>	denver reddit augmentation reddit		31	26	↑5	0.025%	+0.003	0	0	https://www.denverfaceandbody.com/denver-reddit-augmentation-reddit
>	<input type="checkbox"/>	top reddit augmentation reddit reddit reddit		40	35	↑5	0.020%	+0.003	0	0	https://www.denverfaceandbody.com/top-reddit-augmentation-reddit-reddit-reddit
>	<input type="checkbox"/>	looking reddit reddit reddit reddit		14	10	↑4	0.060%	+0.025	0	0	https://www.denverfaceandbody.com/looking-reddit-reddit-reddit-reddit
>	<input type="checkbox"/>	BBL reddit		5	1	↑4	1.000%	+0.833	0.12	+0.10	https://www.denverfaceandbody.com/bbl-reddit
>	<input type="checkbox"/>	reddit reddit reddit reddit reddit		10	6	↑4	0.113%	+0.052	0	0	https://www.denverfaceandbody.com/reddit-reddit-reddit-reddit-reddit
>	<input type="checkbox"/>	looking reddit reddit reddit reddit reddit		16	12	↑4	0.041%	+0.008	0.05	+0.01	https://www.denverfaceandbody.com/looking-reddit-reddit-reddit-reddit-reddit

Section Six

Client References

Mike Carroll

VP of Growth
(734) 794-2636
mike@marketingsupply.co

Mike came to Kaleidico to redesign their content experience to create a more informative and educational experience for web visitors.

Our goal was to design an experience that created higher engagement and conversion from content.

Eric Lupher

President
(734) 542-8001
elupher@crcmich.org

Eric came to Kaleidico to redesign an enormous content library of Michigan Policy research dating back to the 1900s.

Our goal was to honor the heritage and value trapped in their old website and make it accessible to citizens.

Emilee McGaffey

Director of Marketing
(419) 843-1370 ext. 124
emcgaffey@decahealth.com

Emilee came to Kaleidico to build a website design system and platform to be deployed to over 30 pain clinic websites across the nation.

Our goal was to create a flexible and reusable design.

Jill Cheladyn

Human Resource Manager
(616) 552-9516

jcheladyn@groverlewisjohnson.com

Jill came to Kaleidico to reimagine their brand - a new culture, new partners, and new practice areas.

Kaleidico designed a brand the captured Grover Lewis Johnson's passion for fearlessly and empathetically defending their clients in legal market that avoids the toughest cases.

Jessica Manna

President Digital Strategy & Innovation

(561) 702-0552

jessica.manna@fairwaymc.com

Jessica came to Kaleidico to design a new consumer direct website for Fairway Independent Mortgage Corporation.

Since then we have supported multiple corporate and branch digital marketing initiatives from web design to lead generation.

Marco Maceri

Director of Marketing
(248) 996-8298

marco.maceri@pixovr.com

Marco came to Kaleidico to build their PIXO VR website and to develop their lead generation program.

We currently continue to support this savvy startup with strategy, SEO, content development, and email marketing.

Section Seven

Project Investments

Website Redesign

- Strategy + Design
- Development
- QC
- Copywriting

Starting Investment

\$30,000

Lead Generation Program

- SEO Program
- Content Program
- Google Ads
- Email Marketing

Monthly Investment starts at

\$5,000

Lead Generation Program+

- Creative Direction
- SEO Program
- Content Program
- Google Ads
- Ad Creative
- Facebook Ad
- Email Marketing
- Website Optimization
- CRM Optimization

Monthly Investment starts at

\$10,000

KALEIDICO

Ask us anything.

Bill Rice

FOUNDER/CEO

(734) 775-4487
bill.rice@kaleidico.com

Kelley Nowak

BUSINESS DEVELOPMENT

(313) 585-1692
kelley.nowak@kaleidico.com