KALEIDICO

Web Designs that Generate Leads

Mortgage Lenders

Table of Contents

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.

Designing Web Experiences is our Jam

Digital experiences get really sloppy without a **disciplined, contextually aware design process.**

Most frustrating website experiences are the result of a web development process that is devoid of user experience design - a site built to serve functionality, not the customer.

Kaleidico has developed a design process that uniquely blends **decades of experience, exceptional talent, extensive collaboration and intense focus on organizational and user goals.**

Collaboration as Partners

We do our best work when our Design & Development process works in an open and collaborative way.

We like to check-in frequently throughout our projects to make sure everything is moving in the right direction and stays in alignment with business goals.

We don't see a separation between our team and our clients – we are partners, on the same team, and adopt shared goals to create something awesome.

Discovery Phase

We start our projects trying to learn everything we can about you and your team, but we never stop there.

We also research and seek to exploit digital trends and opportunities affecting your industry and to the advantage of your customers and web visitors.

This process enables us to make better strategic and technical decisions later for both your users and your team.

Discovery typically looks like:

Stakeholder interviews and / or workshops

Review and audit existing website - what's working, what's not, are we solving the right problem?

Study your web analytics - how are users coming to and using the site?

Analyze your comparable organizations and industry-relevant web presences.

Our discovery is always documented in a collaborative way to yield a consensus-based roadmap for our project.

Creative Brief
This becomes our project playbook.

We'll walk through this brief as collaborative partners.

Strategy & Design

After the Creative Brief, we start to construct the strategy and turn that plan into detailed steps for execution.

Taking each of our project goals, we workshop as a team to align goals to specific tactics and strategies to make sure that our solutions fulfill the overall project vision and will be executed efficiently and on schedule.

Strategy & Design typically looks like:

Sitemap - Reflects content strategy & user journeys.

Moodboard - Discuss look and feel as well as brand direction or consistency.

Wireframes - collaborate and test content flow, user experience, and functionality.

Design Mockups - Combine the final moodboard and wireframes into a definition and blueprint for the final website.

Functional Specification -

This is created in parallel to our design process. This becomes our development blueprint.

Development Phase

Once the design is complete, we transition to software development. This transition is facilitated through a formal design to development handoff - ensuring perfect clarity of the design and business vision.

Staging and development environments are created as well as a client-owned code repository to ensure proper code and architectural control.

Quality Control

During the Quality Control phase, the website is submitted internally to a combination of team members, some of whom have never seen the website before.

This diverse testing team of designers, developers, and account managers, equipped with a thorough test plan and process prepare the site for User Acceptance Testing (UAT).

User Acceptance is the last phase of development.

Your website is submitted to you for testing. We will collect, log, and fix all deviations from the design and functional specifications.
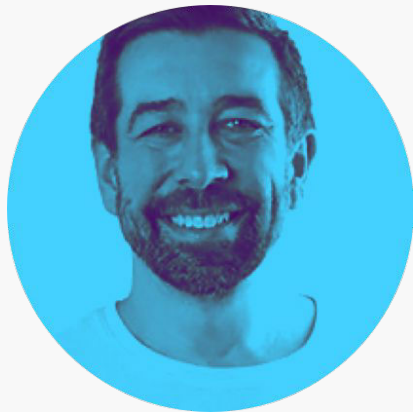
This is a process, that is often neglected by many agencies, is absolutely essential.

Our typical timeline

DISCOVERY &
CREATIVE BRIEF

WIREFRAMES & MOOD BOARDS

FUNCTIONAL SPEC & SITE AUDIT

DESIGN PHASE & COPYWRITING

DEVELOPMENT, QC, & CONTENT MIGRATION

CLIENT QC TESTING
& TRAINING

LAUNCH

WEEK
2

WEEK
4

WEEK
6

WEEK
8

WEEK
10

WEEK
12

WEEK
14

WEEK
16
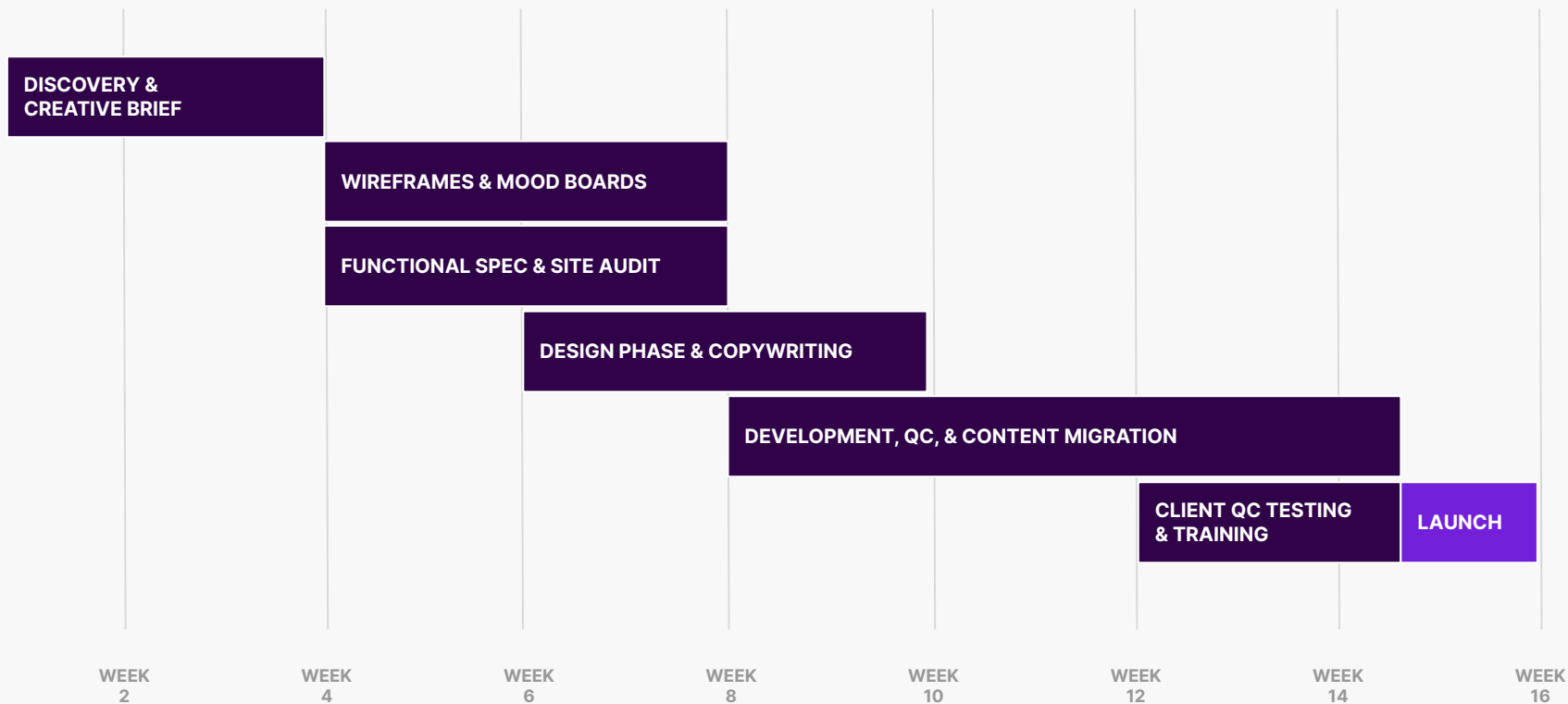
Section Three

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

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
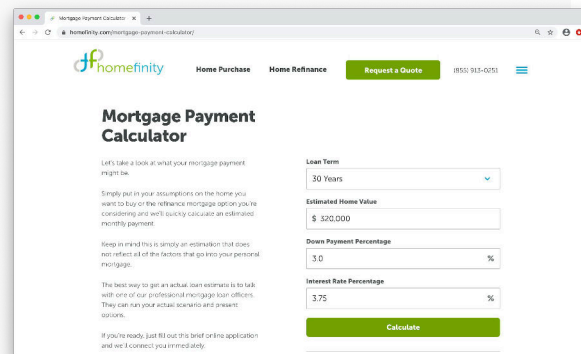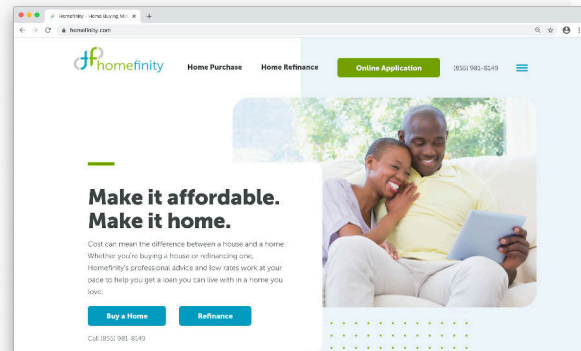
Homefinity

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 →**
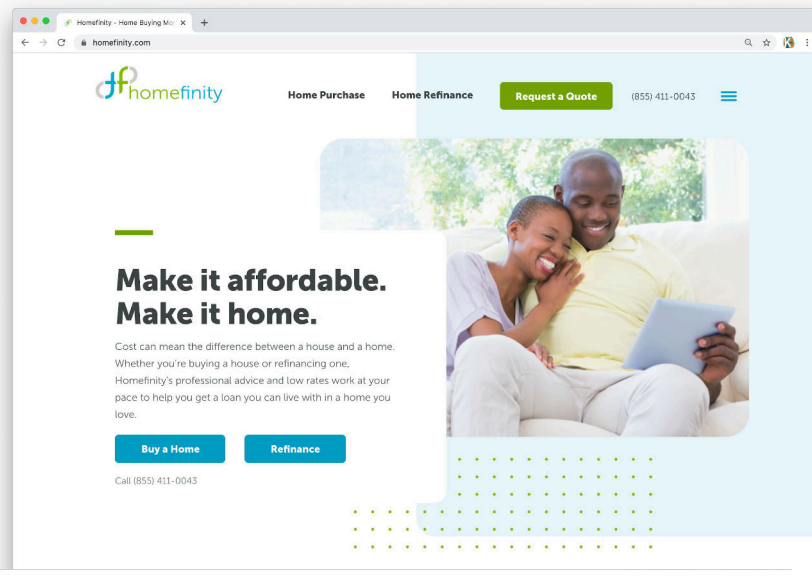
River City Mortgage

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
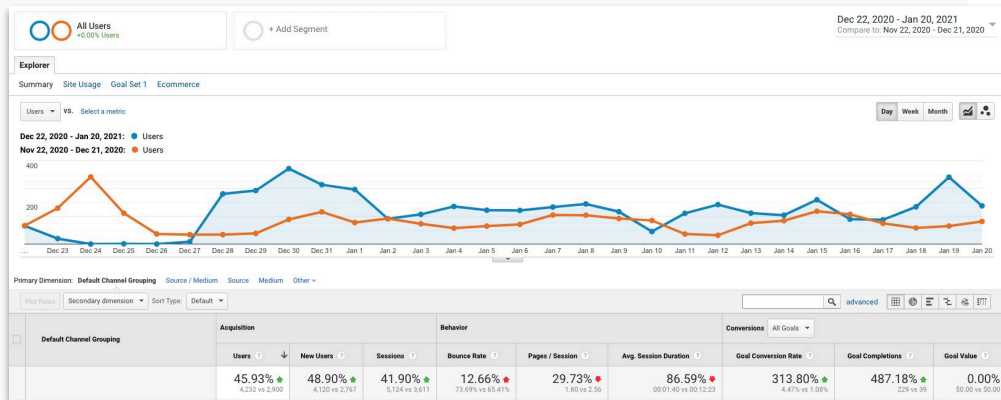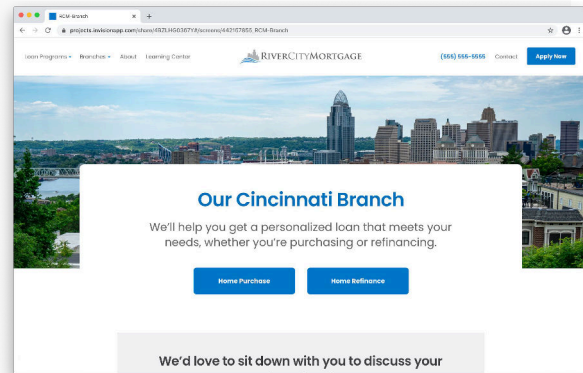
Marquee Funding Group

Marquee Funding Group, a California private money lender, was looking to grow their owner-occupied mortgage lending with a consumer-direct mortgage marketing strategy.
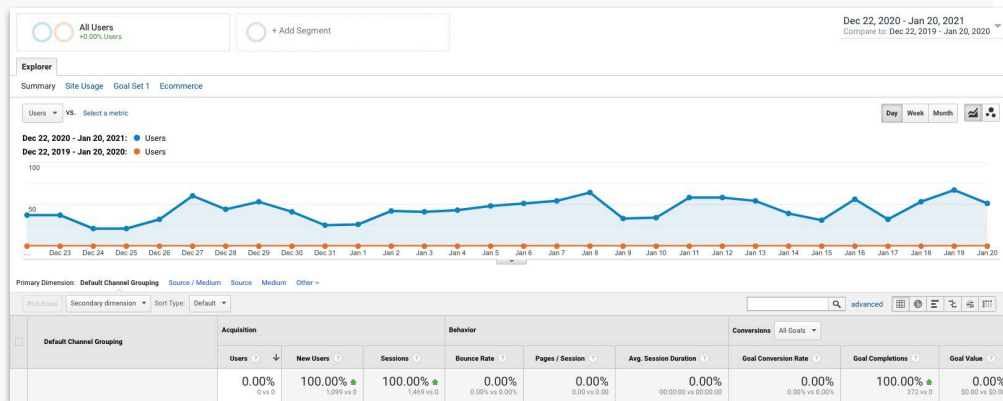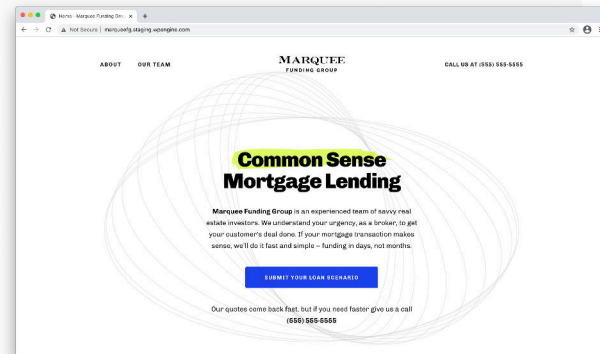
Marquee initiated a competitive search for an agency with mortgage marketing expertise and discovered Kaleidico's unit positioning and experience. We began our relationship with a limited, 30-day strategy engagement.

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

Quizzle.com
Free Credit Report *and* Score

Quicken Loans®

Lenderful

Flagstar® Bank

Spring EQ™

npf new penn FINANCIAL

OCWEN®

dfhomefinity

FAIRWAY INDEPENDENT MORTGAGE CORPORATION
NMLS#2289

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
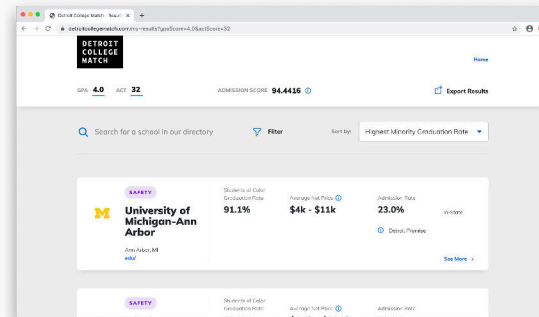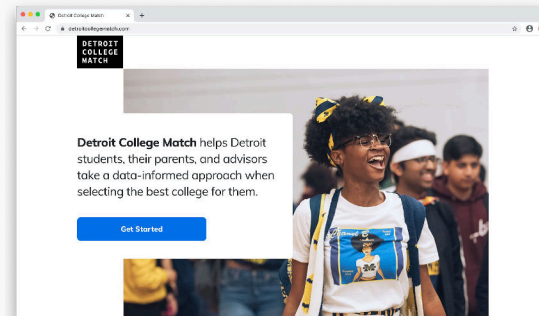
# The Citizens Research Council of Michigan

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
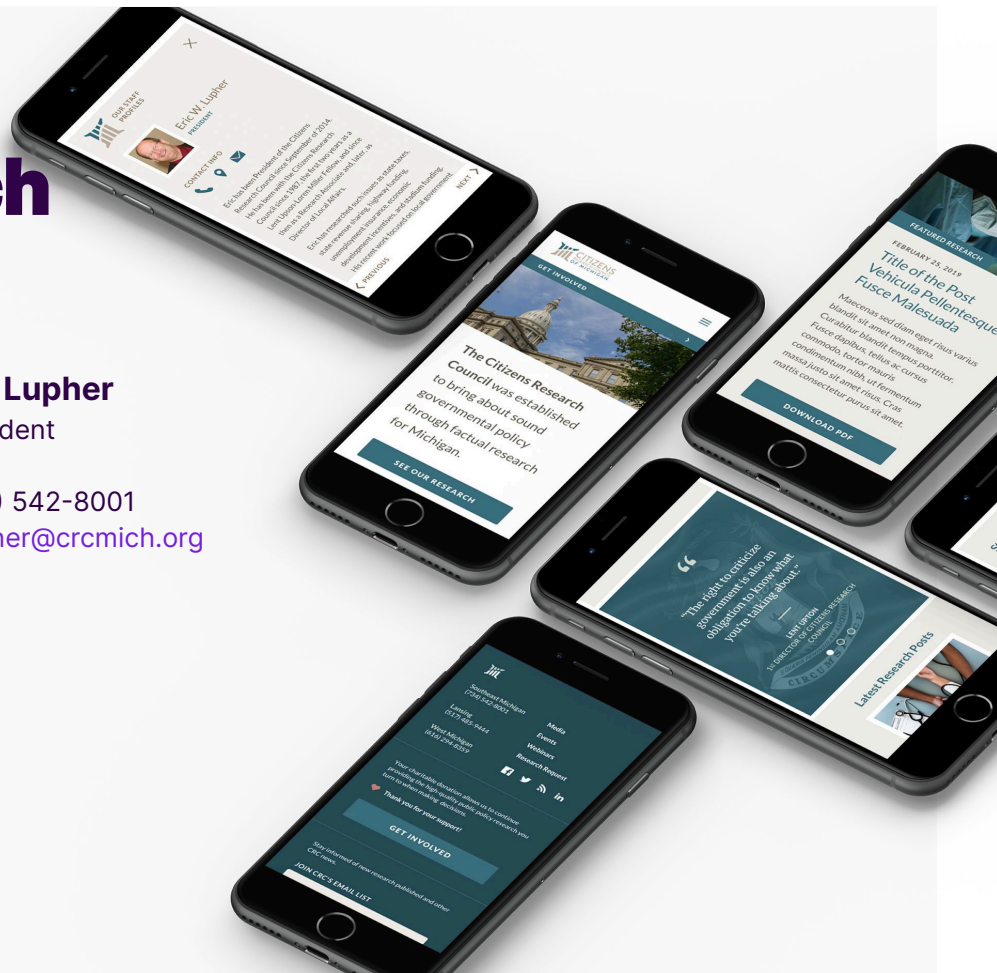
DECA Health

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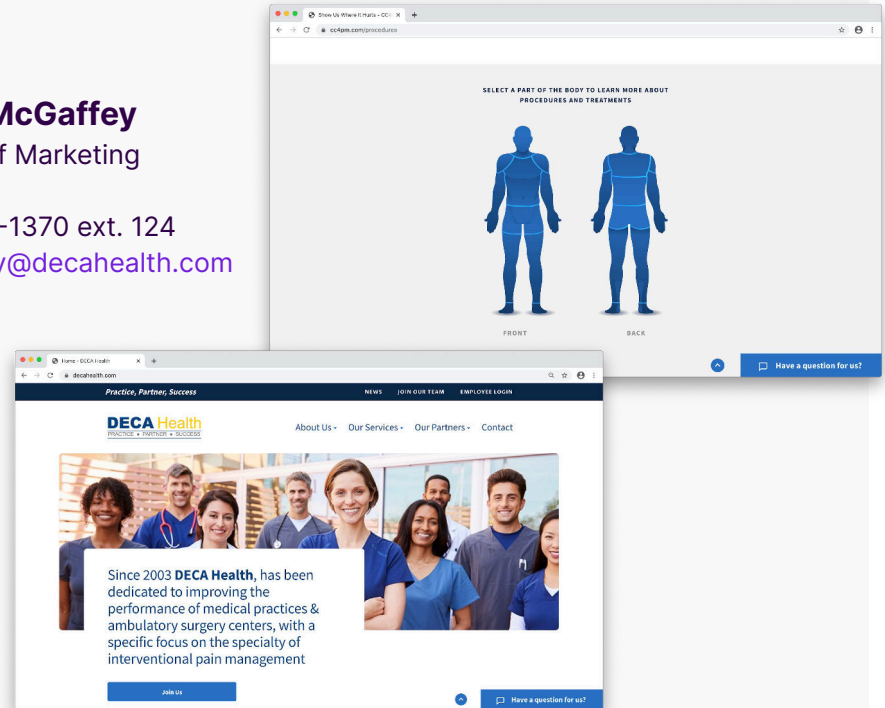
Kaleidico designed and developed a custom theme and Wordpress platform that is built for flexibility and reusability as their business and locations rapidly expand.

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.
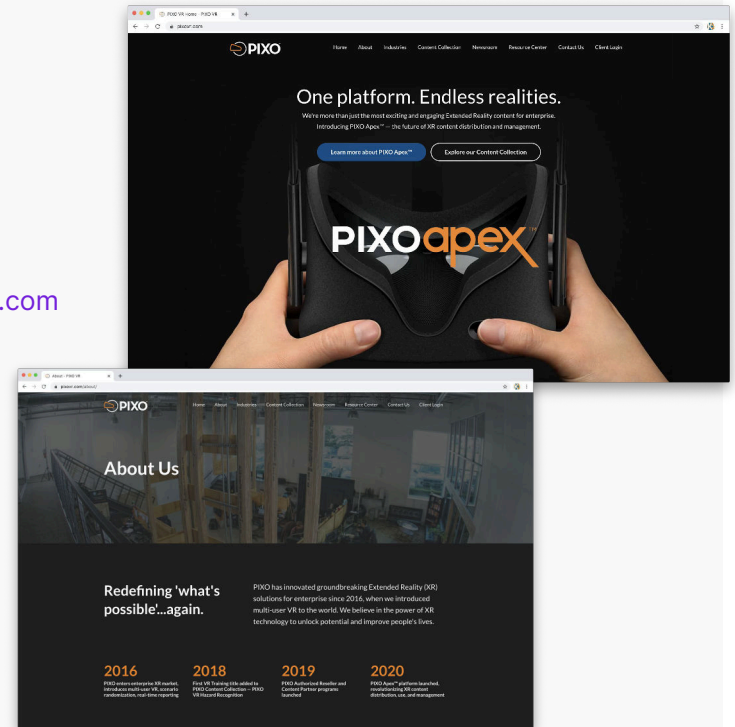
Visit the website →

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.
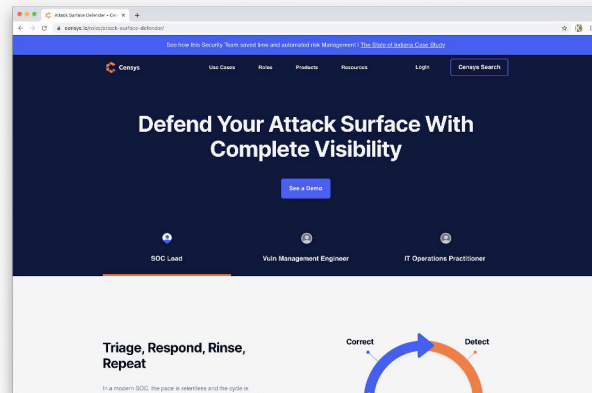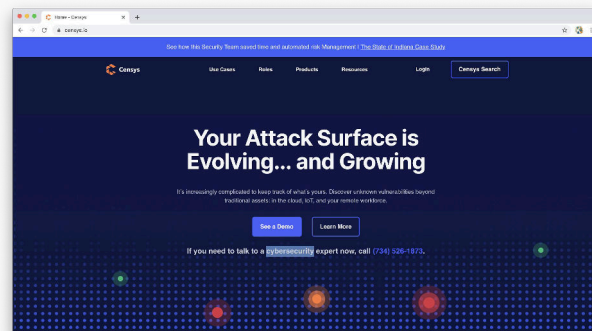
Visit the website →

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
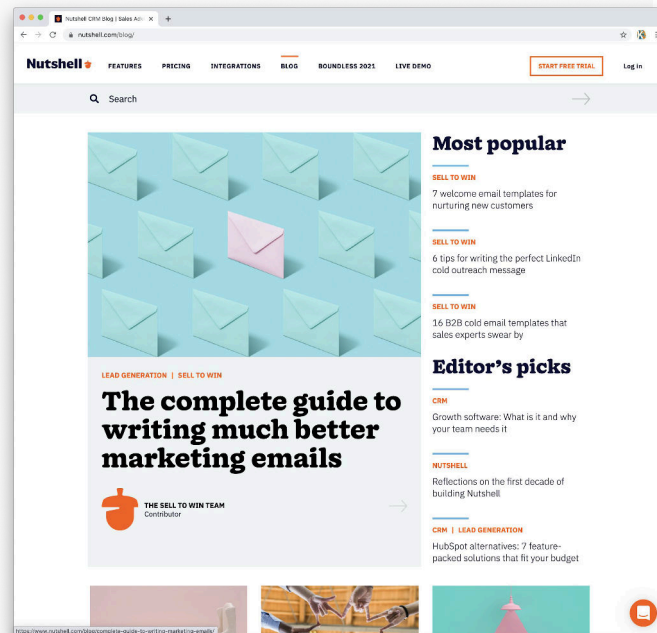
2|42 Community Church

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 →
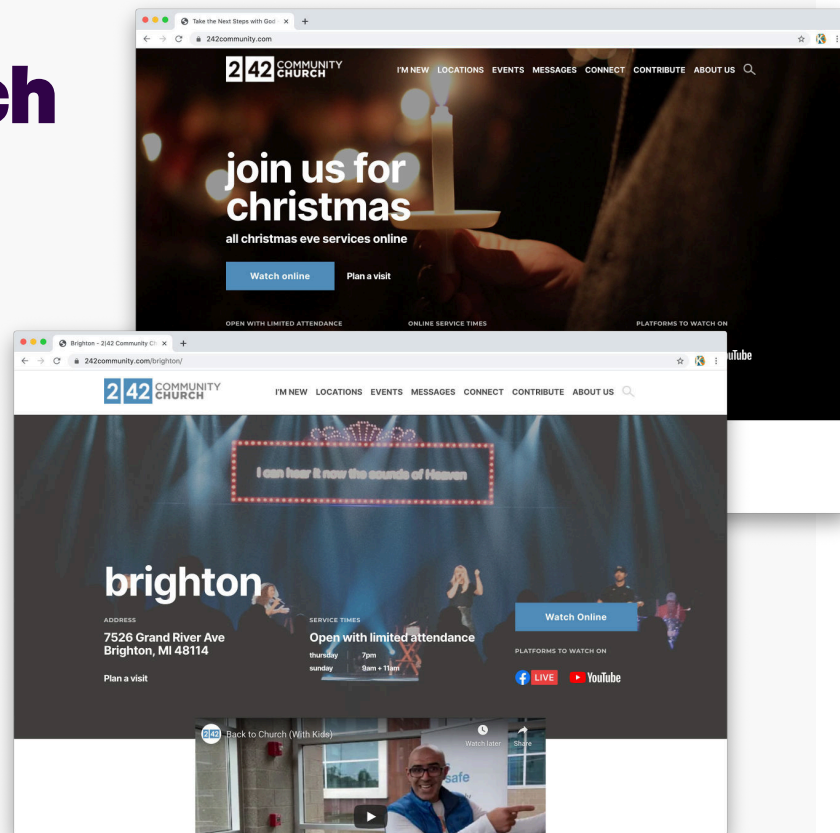
Emmett Plastic Surgery

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)

		Keyword	Pos. Nov 28	Pos. Dec 4	Diff	Visibility	Diff	Est. traffic	Diff	URL
>	☐	breast augmentation surgery	83	41	↑42	0.016%	+0.011	0.01	+0.01	https://www.denv
>	☐	fat transfer breast augmentation pros and cons 2016	73	44	↑29	0.016%	+0.008	0	0	https://www.denv
>	☐	breast augmentation colorado	51	29	↑22	0.023%	+0.009	0	0	https://www.denv
>	☐	breast augmentation near me	70	56	↑14	0.012%	+0.004	0	0	https://www.denv
>	☐	breast lift and augmentation	72	59	↑13	0.011%	+0.004	0	0	https://www.denv
>	☐	colorado breast surgery	72	60	↑12	0.011%	+0.003	0	0	https://www.denv
>	☐	breast augmentation cost colorado	47	40	↑7	0.017%	+0.002	0	0	https://www.denv
>	☐	mommy makeover surgery denver	13	8	↑5	0.096%	+0.058	0	0	https://www.denv
>	☐	ufc official breast implants	16	11	↑5	0.055%	+0.022	0	0	https://www.denv
>	☐	denver breast augmentation surgeons	31	26	↑5	0.025%	+0.003	0	0	https://www.denv
>	☐	top breast augmentation surgeons in colorado	40	35	↑5	0.020%	+0.003	0	0	https://www.denv
>	☐	tummy tuck surgery denver co	14	10	↑4	0.060%	+0.025	0	0	https://www.denv
>	☐	360 co	5	1	↑4	1.000%	+0.833	0.12	+0.10	https://www.denv
>	☐	botox laser for pigmentation	10	6	↑4	0.113%	+0.052	0	0	https://www.denv
>	☐	mommy makeover denver	16	12	↑4	0.041%	+0.008	0.05	+0.01	https://www.denv

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.

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FOUNDER/CEO

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Kelley Nowak
BUSINESS DEVELOPMENT

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kelley.nowak@kaleidico.com