



WEBSITE ANALYTICS THAT WORK



Hi, I'm Greg.



How can I use my website to

**maximize my
productivity?**

What we'll do today...

25-minute CORE
training

Live Q&A and analytics
audits

Next action steps to help
improve your results

3 important analytics
How to interpret what they're telling you

Set up
Assess
Analyze



What is "analytics"?

A methodology for creating data-driven insights about user behavior and engagement on a website, which is crucial for understanding audience demographics, optimizing site performance, and enhancing user experience.

Analytics helps you make informed decisions about business growth and marketing strategies.

WHAT ANALYTICS CAN TELL YOU

How to know if your **ideal client recognizes they're a good fit** within seconds of visiting your website

How well you **stand out from other advisors** with a brand story and message that put your ideal clients first

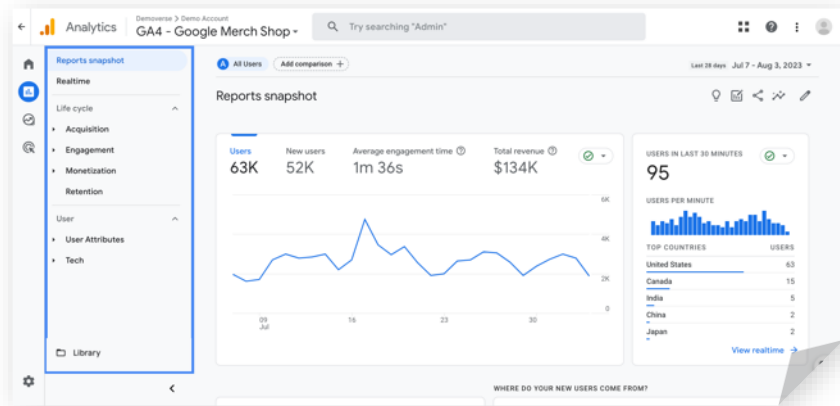
How to know if you have a **unique process** that your ideal client wants to sign up for

GET STARTED WITH ANALYTICS



Google Analytics

- Works with most website platforms
- Terms and techniques are universal



Google Analytics

3 Important Analytics Metrics

Metrics to pay attention to and what they're telling you

1

Views by Page

The pages people spend the most time on

2

Session Duration & Bounce Rate

How long people spend on your site and how useful they find it

3

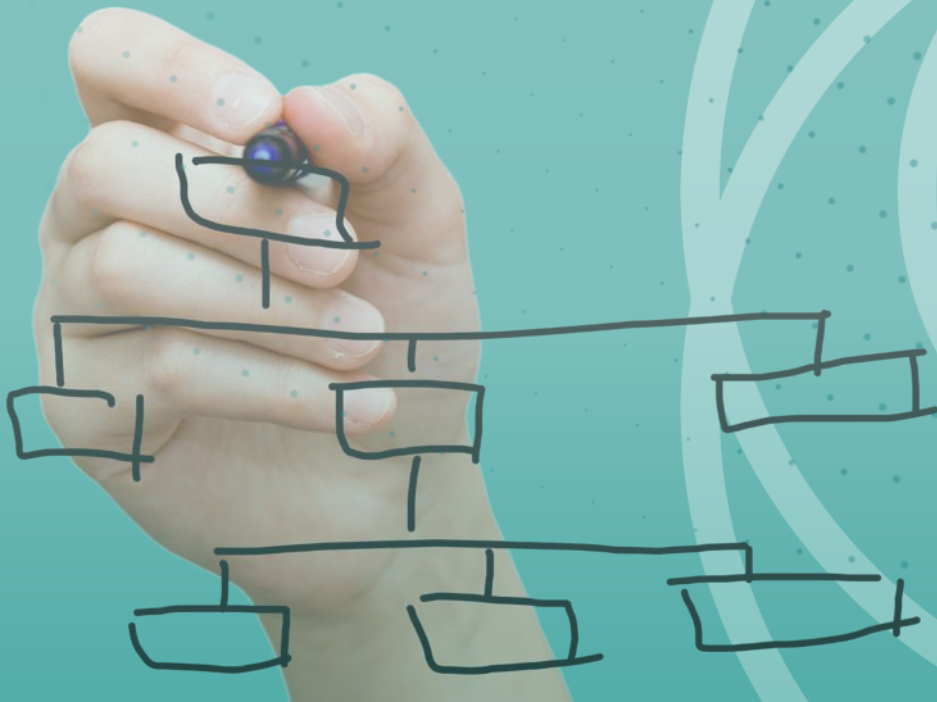
Traffic Source

Where people come from and their intent to invest in your services

1

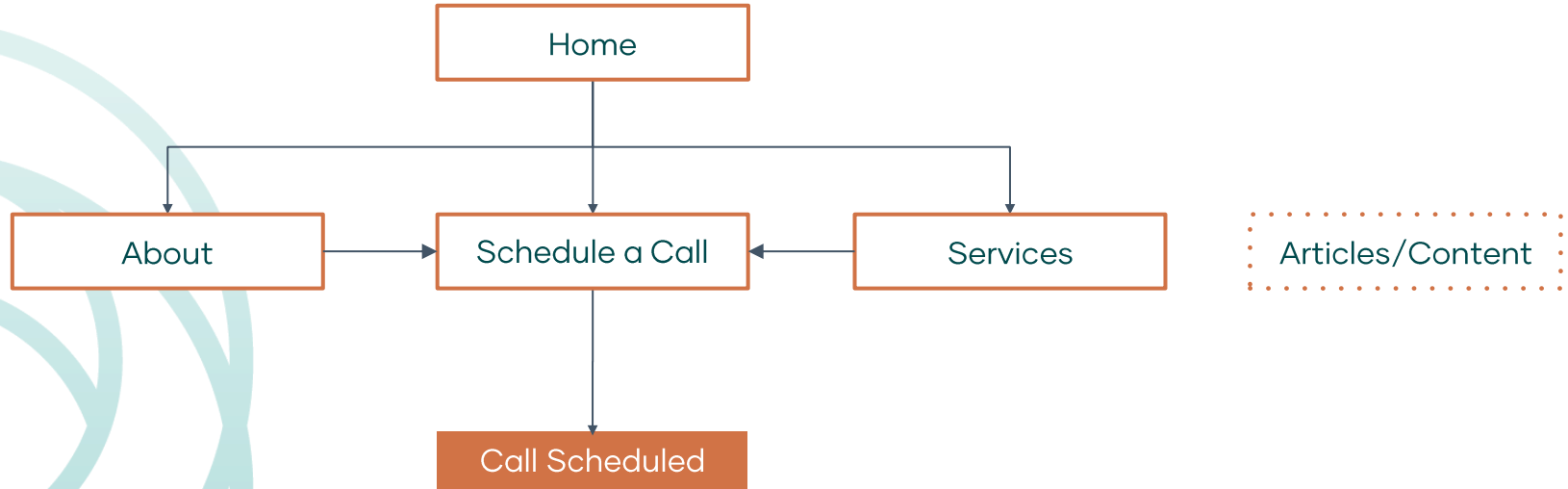
VIEWS BY PAGE

The pages people spend the most time on

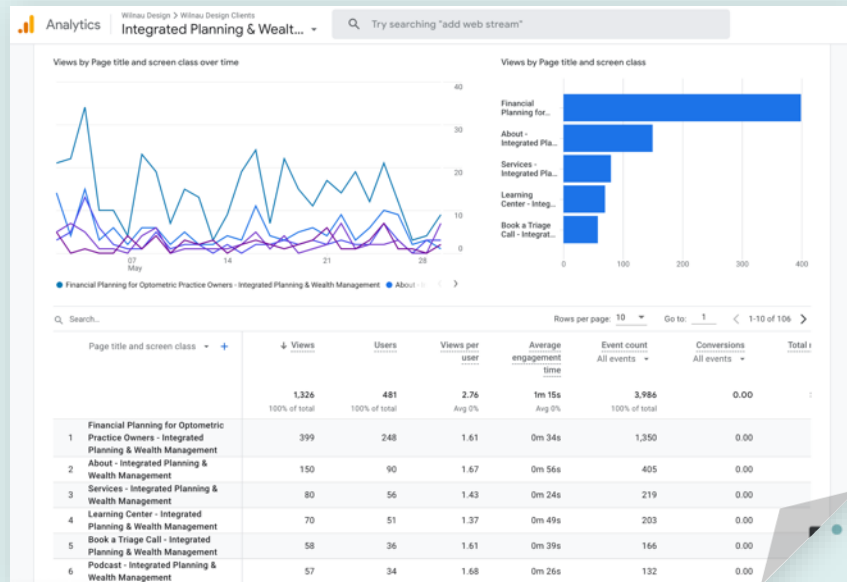


Top-Level Pages

Prospects typically visit these pages before scheduling a call to check fit



Do you know how these pages are performing?



2

SESSION DURATION & BOUNCE RATE

Are the message and next steps clear and specific?



What is session duration?

→ How long people spend on your site before they leave

What is bounce rate?

→ Percentage of people who view a page on your website and do not view any other pages





What these can tell you

Clarity of your message

Specific next-step instructions
(calls to action)

Speaks to your target client

(Don't make people think!)

BEFORE

**Helping optometrists plan life.
On purpose.**



Schedule a Meeting

Connect with us today to learn more about how our services can help you.

[Learn More](#)



Who We Serve

Meeting the essential personal and practice financial planning needs of optometrists and practice owners around the country.

[Learn More](#)



Who We Are

A firm dedicated to providing sound, fundamental financial advice designed to satisfy your unique goals.

[Learn More](#)



Our Process

Wealth management requires a multi-tiered strategy. By understanding every facet of your financial goals, we develop a plan that meets your expectations while providing long-term peace of mind.

[Learn More](#)

Financial & Retirement Planning for **Optometric** Practice Owners

Manage Cashflow | Reduce Taxes | Invest Prudently

[Click Here to Get Started](#)

Our calls are always relaxed and pressure-free. Guaranteed.



AFTER

Before

0m 10s

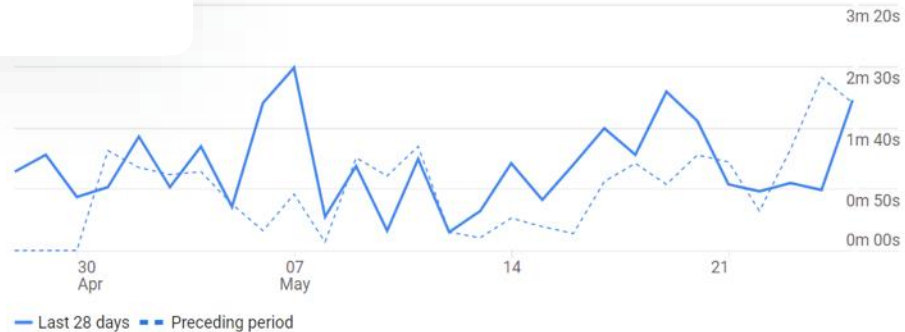
↓29.3%



After

1m 14s

↑67.7%





"We've **doubled daily sign-ups** to our email newsletter in the first month since the new site launched."

ADAM CMEJLA CFP®
Integrated Planning and Wealth Management

3

TRAFFIC SOURCE

Where people come from & how they find your website



TRAFFIC SOURCES



Source	Before	After
Direct	91%	35%
Organic Search	6%	47%
Referral	1%	6%
Email	1%	7%
Social	1%	5%

How do I improve my traffic sources?

Direct: Improve user experience & tell more people about your site

Organic: SEO optimization, high-quality original content

Social: Engaging content, link to your website when relevant

Email: Write good emails, add links to your website

Referral: Build partnerships, guest posts, podcast interviews

The background features a complex network of interconnected nodes and lines, resembling a molecular or data network. The nodes are small spheres in shades of light blue and teal, connected by thin grey lines. Larger, more prominent nodes in red and orange are scattered throughout. On the left side, there are several overlapping white circles of varying sizes, creating a circular graphic element. The overall color palette is light and airy, with a focus on blues, teals, and greys, accented with red and orange.

Source & Quality of Traffic



Planning Your Amazing Retirement Starts Today

Hi, I'm Benjamin. My mission is to answer all your retirement questions, even the ones you don't know to ask. Start today and download my Retire-Ready Toolkit.

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Forbes

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INSIDER

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Planning
Retirement

Hi, I'm Benjamin. My mission is to help you with the retirement questions you don't know to ask.

GET THE TOOLKIT



Benjamin Brandt ▾

Pop-Ups

CREATE NEW POP-UP

Dashboard

Landing Pages

Sites

Conversion Tools

Pop-Ups

Alert Bars

Leads

Brand

Images

Lead Magnets

Integrations

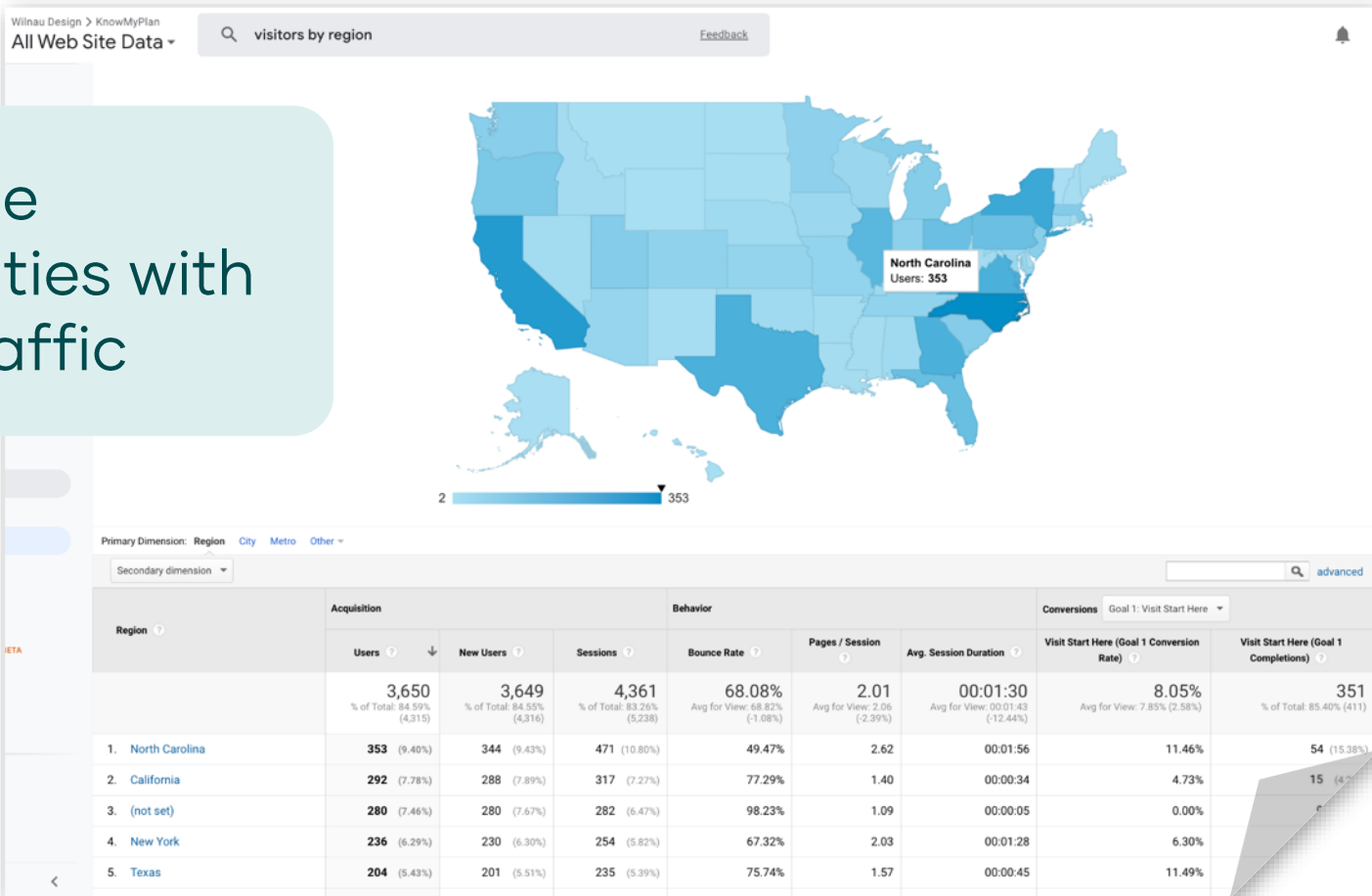
Domains

Support

UPGRADE

	Search	Last Updated ▾	All Labels ▾	Unique Visitors	Conversions	Conversion Rate	Earnings	
		Retire-Ready-Toolkit - Sidebar Published 01/17/22		924	456	49%	\$0.00	
		Retire-Ready-Toolkit - In Blog Published 01/17/22		1620	667	41%	\$0.00	
		Retire-Ready-Toolkit - Exit Box Published 01/22/18		29663	588	2%	\$0.00	
		In blog opt-in Published 01/18/18		70	40	57%	\$0.00	
		Retire-Ready-Toolkit - Footer Published 01/14/18		287	116	40%	\$0.00	
		Retire-Ready-Toolkit - Landing Page Published 12/19/17		309	155	50%	\$0.00	
		Social-Security-Documents-Checklist Published 11/07/17		0	0	0%	\$0.00	
		Background check Published 11/07/17		43	8	19%	\$0.00	

How to See Opportunities with Source Traffic



ACTION STEP



www.google.com/business



"Last week, we got **8 leads**
just from our website."

Erik Young, AAMS®
Financial Planner, Valtinson Bruner Financial Planning



ACTION STEPS

1 Sign up for Google Analytics (it's free) and add it to your website

Wait a few days to see the data come in, then look at these analytics:

- 2
- o Views by page
 - o Session duration & bounce rate
 - o Traffic source

3 Perform an analysis of your Homepage

ACTION STEP: Set Up

Sign up for Google Analytics (it's free) and add it to your website

- ➔ Link to Google Analytics: analytics.google.com
- ➔ Your website platform likely includes analytics out of the box. Platforms like SquareSpace, FMG Suite, AdvisorSites, include analytics. Contact your platform's support for more info
- ➔ If you're not sure how to add analytics, do a quick Google search for "does [your website platform] work with Google Analytics". If it does, do a search for "how to add Google Analytics to [your website platform]"

ACTION STEP: Assess

Wait a few days to see the data come in, then look at views/page, session duration, bounce rate, and traffic source



Compare the data with the strategies we covered today



What are your highest viewed pages?
How much time do people spend on those pages?

ACTION STEP: Analyze

Perform an analysis of your homepage

- Does it articulate what you do and who it's for? Does it give a clear next step?
- Identify one thing you could change that would have the biggest impact.
- Review source traffic by region. If you're not in the top 3 for the location of your state, consider signing up for a Google My Business profile for Local SEO: www.google.com/business

The screenshot shows a 'Website Self-Evaluation Form' for 'WHEELS'. It includes a title, a logo, and a list of instructions. The form is divided into three sections: 'THE PERFECT HOME PAGE', 'THE UPSIDE DOWN ABOUT PAGE', and 'THE SCHEDULE A CALL PAGE'. Each section has a score of 1, 2, 3, or 4. A 'TOTAL SCORE' field is present. Below the sections are three 'PEEK REVIEW' boxes, each containing a list of pages and their scores. The form is styled with a light blue and white color scheme.

Website Self-Evaluation Form WHEELS

WEBSITE:

Use the assessment below to evaluate and grade your website while looking for opportunities to improve.

The maximum total score enables your website using the following scoring system:

- 1 - We don't have that!
- 2 - Not sure if we have this.
- 3 - Have it, but a new evaluation could't hurt.
- 4 - Good to go!

THE "PERFECT" HOME PAGE **THE "UPSIDE DOWN" ABOUT PAGE**

1 2 3 4 1 2 3 4

THE SCHEDULE A CALL PAGE

1 2 3 4

TOTAL SCORE: []

Total Score = 5 out of 12
It's time for a website overhaul.

Total Score = 6 - 11
It's time to refresh your website to reflect best practices.

Total Score = 12 or above
Good work! Look for opportunities to maximize website conversions.

PEEK REVIEW 1

The "Perfect" Home Page	The "Upside Down" About Page	The Schedule a Call Page
☆☆☆☆	☆☆☆☆	☆☆☆☆
Website		

PEEK REVIEW 2

The "Perfect" Home Page	The "Upside Down" About Page	The Schedule a Call Page
☆☆☆☆	☆☆☆☆	☆☆☆☆
Website		

PEEK REVIEW 3

The "Perfect" Home Page	The "Upside Down" About Page	The Schedule a Call Page
☆☆☆☆	☆☆☆☆	☆☆☆☆
Website		

Want a website that
converts?

Check out wilnaudesign.com/limitless

LIVE REVIEWS



If you are interested in a working with us, check out wilnaudesign.com/limitless and tell us about your project!