

Finance SEO Reporting Framework

Dashboard blueprint linking SEO performance to pipeline, assets under management, and compliance activity.

Dashboard Structure

1. **Executive Overview** – Organic traffic, qualified conversions, booked revenue/AUM impact.
2. **Pipeline & Conversion** – Lead sources, conversion rates per product, compliance status.
3. **Content & Authority** – Top performing articles, backlinks, PR coverage, regulatory approvals.
4. **Technical Health** – Core Web Vitals, crawl stats, schema coverage, error trends.
5. **Compliance Log** – Pending approvals, disclosure updates, regulator submissions.

Data Sources

- Web analytics (GA4, Adobe Analytics) with consent segmentation.
- CRM or marketing automation (HubSpot, Salesforce, Marketo) for pipeline attribution.
- Call tracking/meeting schedulers for advisor-led conversions.
- Compliance systems or spreadsheets logging approvals and reviews.
- Search Console, log files, ranking tools (Ahrefs/Semrush) for visibility metrics.

Core KPIs

Category	KPI	Owner
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Acquisition	Qualified organic sessions, share of voice	Marketing
Conversion	Booked revenue, AUM enquiries, loan pre-approvals	Sales / Advisory
Efficiency	CAC vs. LTV, paid vs. organic mix, funnel velocity	Finance
Compliance	Pending approvals, overdue disclosures, regulator interactions	Compliance
Authority	Referring domains, PR wins, analyst mentions	PR / Comms

Reporting Cadence

- **Weekly**: Technical health, traffic anomalies, critical compliance actions.
- **Monthly**: KPI review with marketing, sales, compliance leads.
- **Quarterly**: Board-ready summary linking SEO investments to revenue and risk reduction.

Implementation Tips

- Use data warehouse or BI tool (Looker, Power BI) to unify sources.
- Document metric definitions and owners in a data dictionary.
- Automate alerts for compliance deadlines and major performance shifts.
- Archive dashboards quarterly for audit purposes.