

Where accounting meets engineering.

Clean books, live dashboards and accounting systems built by someone who has spent a career in both worlds.

BRIAN KELLY

Founder · Accounting & Business Data Advisor

20+

years of accounting experience,
starting in a family CPA firm

11+

years as a software engineer on
mission-critical systems

20+

platforms and tools: QuickBooks, Xero,
Gusto, Ramp, Puzzle, Stripe and more

01

EVERY BUSINESS OWNER · LIVE DASHBOARDS

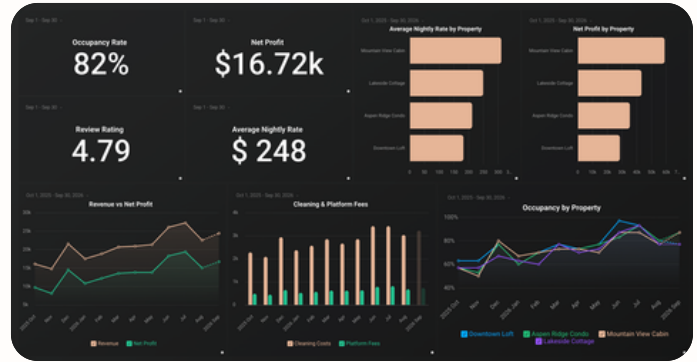
Databox Industry Dashboards

TOOLS Databox · QuickBooks Online · Xero

KELLCAT DEMOS · SAMPLE DATA



Service business: revenue, gross profit, close rate, jobs



Short-term rentals: occupancy, nightly rate, profit by property

THE PROBLEM

Owners log into five apps to answer one question, and by the time a report is built the moment has passed.

WHAT I BUILT

Industry dashboards that start with the six numbers every owner should know, then add the KPIs that matter in that industry.

THE RESULT

They update automatically from QuickBooks or Xero, so the owner sees the whole business in one place without building a report.

6

core numbers on every dashboard

+KPIs

chosen for each industry

24/7

live view, reviewed with you monthly



See the live demos
kellcat.com/dashboards

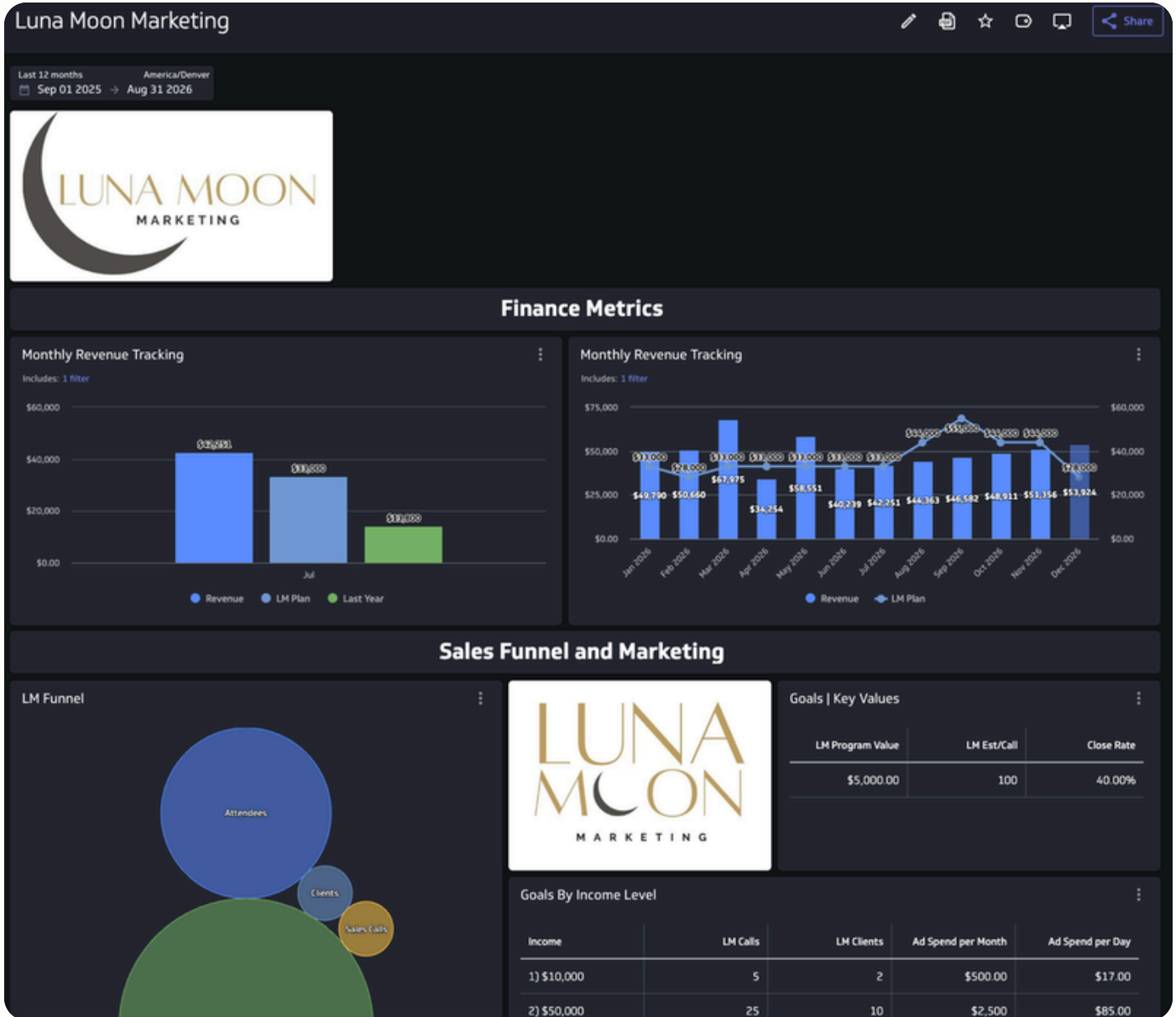
02

MARKETING-DRIVEN BUSINESSES

Klipfolio Finance + Marketing Dashboard

TOOLS Klipfolio · accounting + marketing data

SAMPLE COMPANY: LUNA MOON MARKETING (ILLUSTRATIVE)



THE PROBLEM

Finance lives in one tool and marketing in another, so nobody can say which spend actually turns into revenue.

WHAT I BUILT

One professional view: monthly revenue against plan and last year, next to the sales funnel, campaigns and goals by income level.

THE RESULT

The owner can see how marketing spend turns into revenue without switching platforms or waiting for month-end.

03 MARKETING-DRIVEN BUSINESSES

Google Sheets Executive Dashboard

TOOLS Google Sheets · accounting, marketing and operations data

SAMPLE COMPANY: LUNA MOON MARKETING (ILLUSTRATIVE)



THE PROBLEM

A growing business needs one view of the numbers but isn't ready to pay for new software.

WHAT I BUILT

An executive dashboard in Google Sheets: forecast against last year, a 12-month forecast, website traffic, registrations and email performance.

THE RESULT

A live view that's easy to check in minutes, built in a tool the team already uses. The full picture is one tab away.

04 MARKETING-DRIVEN BUSINESSES

The 5-Point Audit

TOOLS Google Sheets · Google Analytics · Mailchimp · Facebook Ads

SAMPLE COMPANY: LUNA MOON MARKETING (ILLUSTRATIVE)

The 5 Point Audit System

Audit Stats for Luna Moon 2025 Full Year

Software:	Google Analytics											
Segment:	Total Website Traffic											
Metric:	Total Traffic, Users, Specific Pages, Behavior											
1. Data Snap Shots	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
12 months:	66,733	60,469	50,060	65,171	72,761	67,819	33,541	49,227	50,434	74,780	81,274	86,832
Last 30 days	5,558	6.84%										
Last 60 days	12,052	16.12%										
Last 90 days	36,398	72.17%										
2. Wins:	Month 12 has been the best traffic month YTD, driven by 40% social traffic of which Pinterest was the #1 leader											
3. Watchouts:	Month 7 showed significant decrease. Volume decreased in all areas, but Email traffic remained strongest.											
4. Special Notes:	Bounce rates decreased in Month 12 as well, with Blog ABC having the lowest bounce rate											
5. Dashboard Item:	YES, because this ties to clients objectives of driving 3x traffic to the site to hit \$1M in revenue											

Software:	Mail Chimp											
Segment:	Broadcast											
Metric:	Open Rates, Click Rates, Click Links Review											
1. Data Snap Shots	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
12 months:	3.0%	3.6%	3.0%	3.6%	4.3%	5.2%	6.2%	7.5%	5.0%	6.0%	7.2%	8.6%
Last 30 days												
Last 60 days												
Last 90 days												
2. Wins:	Month 12 has been the highest click rate driven by 43.2% open rate in December. It's probably driven by the Holiday shopping and deals											
3. Watchouts:	Month 1 and 3 have the lowest click rate. The first quarter of the year have the lowest click but the email open rate has been increasing significantly on the positive side											
4. Special Notes:	The second half of the year actually exceeded the goals for opens and clicks											
5. Dashboard Item:	YES/NO, because the conversion rate is more important because we want to know how the open/clicks translate into actual sales.											

Software:	Facebook Ads											
Segment:	Webinar											
Metric:	Cost per Lead											
1. Data Snap Shots	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
12 months:	201	151	180	183	185	191	160	168	164	128	358	405
Last 30 days	47	13.13%										
Last 60 days	277	216.41%										
Last 90 days	241	146.95%										
2. Wins:	the lowest cost per lead is Month 10											
3. Watchouts:	the highest cost is Month 12.											
4. Special Notes:	The cost fluctuate over time											
5. Dashboard Item:	YES, because ads can fluctuate so much, keep a close eye on this each week to stay within target of \$X per lead											

1

Data snapshot

Key numbers by month

2

Wins

What to keep doing

3

Watchouts

Trends to catch early

4

Special notes

Context numbers can't show

5

Dashboard item

The one metric to focus on

Every month, each platform (website traffic, email and paid ads) runs through the same five checkpoints. The snapshot sets the baseline: 12 months of history plus 30, 60 and 90-day trends. Wins show what's working. Watchouts catch a slide early, while it's still cheap to fix. Special notes add context the numbers can't show, like a holiday promotion or a one-time expense. The dashboard item names the one metric to watch each week.

The result isn't just a monthly report. It's a compass: routine numbers turned into advice an owner can act on, with a one-time expense or a slow season never mistaken for a crisis.

Let's look at your numbers **together.**

Start with a free Books & Numbers Review: an accounting review of your QuickBooks or Xero books, a live dashboard of your six core numbers, and an advisor's read on what's working, what to watch and what it means in dollars.



Free Books & Numbers Review

kellcat.com/books-review



Book a discovery call

kellcat.com/discovery

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CREDENTIALS



Xero Certified Advisor

Puzzle Certified Advisor