Priceactiontalk — Roadmap & To■Do List (2025–2030)

This document is a practical, step■by■step to■do list to build Priceactiontalk into a scalable, data■driven education business. Each topic starts with a plain■English explanation (assuming near■zero prior knowledge), a short to■do checklist, measurable KPIs, and one vetted **English** YouTube starter video.

Legend: **Master** = skills to learn, **Build** = assets/processes to create, **Measure** = metrics to track. Targets are realistic ranges you can iterate toward.

A) Asia Growth Priorities (focus by end■2026)

Goal: localize offers and distribution for Pakistan, India, UAE (English + simple Urdu/Hindi); drive trials that convert into long■term members.

1. Offer–Market Fit (South Asia specific)

What it is: Understanding which audience slices (Pakistan, India, UAE) have which pains, budgets and language preferences, then shaping offers and pricing that match.

Why it matters: Without fit, marketing spends money but doesn't convert.

Master:

- Audience slices & pains (students, early traders, professionals).
- Willingness■to■pay & language needs (English + simple Urdu/Hindi).

Build:

- 2–3 clear offers (Core, Bias■Tool, Cohort).
- Localized pricing/currencies; scholarship/trial logic.

Measure:

- Visit → trial conversion (target ≥ 6–10%).
- Trial → paid (target ≥ 35%).
- Refund rate ≤ 3%.

Starter video: Y Combinator: How To Find Product Market Fit (David Rusenko)

2. Content Engine (that drives leads)

What it is: A repeatable system to publish long■form videos, Shorts/Reels and carousels that teach your macro→technical gold narrative and capture emails.

Why it matters: Consistent, useful content builds trust and fills your funnel.

Master:

- Pillar formats: YouTube longform, Shorts/Reels, IG carousels.
- Storytelling: macro → technical → trade plan.

Build:

- Weekly content calendar & CTA library.
- Lead magnets (checklists, heatmap previews); EN + simple Urdu/Hindi captions.

Measure:

- Lead magnet opt■in rate ≥ 25–40%.
- Watch■time & subscriber growth.
- CTA click■through ≥ 2–4%.

Starter video: Content Marketing for Beginners (Ahrefs)

3. Paid Acquisition Basics (Meta + YouTube)

What it is: Running simple, compliant ads to amplify your best content/offers, while testing hooks and creatives.

Why it matters: Paid lets you scale proven messages fast.

Master:

- Creative testing (hooks, angles).
- Ad policy basics for financial education.

Build:

- 3–5 evergreen ad angles and UGC/testimonial creatives.
- Simple 1■offer landing pages.

Measure:

- CAC vs. LTV (target ≥ 1:3 LTV/CAC).
- First■purchase CPA; thumb■stop & add■to■cart rates.

Starter video: Facebook/Meta Ads Tutorial 2025 (Beginner Step■by■Step)

4. SEO & Search Demand Capture

What it is: Publishing pages that answer high■intent searches (e.g., gold seasonality, real yields & gold, COT basics).

Why it matters: Captures 'ready to learn' users at low cost.

Master:

- Keyword intent clusters and long■tail topics.
- Basic on■page SEO (titles, headings, internal links).

Build:

- Pillar/cluster hubs, glossary, daily notes archive.
- FAQ/HowTo schema where relevant.

Measure:

- Non■brand clicks & 50+ target keywords ranked.
- ≥ 15% of leads sourced from SEO.

Starter video: Complete SEO Course for Beginners (Ahrefs)

5. Community Onboarding & Activation

What it is: Design the 'zero■to■first■win' experience so new members succeed in 7 days.

Why it matters: Fast wins reduce churn and create momentum.

Master:

- Activation psychology, clarity, and friction removal.

Build:

- 7■day starter path, first task/call, weekly challenge.
- Welcome DMs/emails; 'post your plan' ritual.

Measure:

- Day■7 activation ≥ 60%.
- Week■4 retention ≥ 50%.
- Monthly posting members ≥ 35%.

Starter video: Designing Great Onboarding for Your Online Community

6. Retention & Ascension

What it is: Keep members engaged with habits, clear progress and valuable upgrades (Core → Cohort/1:1).

Why it matters: Retention compounds MRR and word■of■mouth.

Master:

- Habit loops and perceived ROI.
- Progression tiers and upgrade timing.

Build:

- Monthly curriculum themes; live office hours.
- Feedback loops; case■study wall.

Measure:

- 3■month retention ≥ 70%.
- NPS ≥ 45.
- Upgrade rate ≥ 10–15%.

Starter video: Customer Retention Strategies for a Subscription Business

7. Referral & Ambassador System

What it is: Make it easy and fair for members to invite friends using trackable links/codes and clear perks.

Why it matters: Referrals lower CAC and increase trust in South Asia.

Master:

- Incentive design and fraud■prevention basics.

Build:

- Member referral links/codes; 'bring■a■friend' events.
- Affiliate terms page; dashboard to track referrals.

Measure:

- ≥ 20–30% of new members from referrals.
- Referral K■factor ≥ 0.25.

Starter video: Build a Referral Program that Actually Works (2025)

8. Partnerships & Distribution

What it is: Co■marketing with regional creators, finance clubs and data providers; education■only, broker■agnostic collaborations.

Why it matters: Partners unlock distribution you can't buy easily.

Master:

- Partner selection and value■exchange basics.

Build:

- Partner list & outreach SOP; webinar kit.
- Guest content swaps; campus/community events.

Measure:

- Partner■sourced leads ≥ 15–25%.
- Webinar RSVP → join ≥ 40–50%.

Starter video: Partnership Marketing Strategy for SaaS (GTM)

9. Payments, Trust & Local Ops

What it is: Show local currencies, offer compliant payment options, and make guarantees/policies crystal clear.

Why it matters: Trust and local convenience lift checkout conversion.

Master:

- Local currency presentment & tax invoicing basics.
- Trust signals (testimonials, policies, SLAs).

Build:

- Multi■currency pricing; installments where legal.
- Transparent policy pages; success■story library.

Measure:

- Checkout conversion ≥ 3–5% from LP.
- Support SLAs met; failed■payment recovery rate.

Starter video: Using Localized Pricing in Stripe Checkout (Official)

10. Analytics & Growth Ops

What it is: Instrument the full funnel and review experiments weekly.

Why it matters: Without data, you can't prioritize or scale.

Master:

- GA4 basics; cohort analysis; CAC/LTV math.

Build:

- Dashboard: traffic → lead → trial → paid; retention cohorts.
- Weekly growth review cadence and backlog.

Measure:

- ≥ 2–4 experiments/week shipped.
- Country/creative■level CAC/LTV ≥ 1:3.

Starter video: Google Analytics 4 Tutorial for Beginners (2025)

B) Fund & Institutional Build (EU/DE■first)

Goal: understand the regulatory landscape, structure, risk and operations for a compliant, scalable investment management setup.

11. Regulation & Licensing Path (EU/DE)

What it is: At a high level: MiFID II governs investment services; UCITS covers retail funds; AIFMD covers alternative funds. In Germany, BaFin supervises and you can either seek your own license or work under an umbrella (liability umbrella/AIFM).

Why it matters: Clarity here saves time and legal cost later.

Master:

- Basics: UCITS vs. AIFMD; MiFID II scope; BaFin's role.
- Passporting & cross■border marketing concepts.

Build:

- Decision tree: own license vs. umbrella.
- 12–24 month roadmap; policy list (Best Execution, Conflicts, Record■Keeping, AML/KYC).

Measure:

- Milestone tracking vs. roadmap; legal gaps closed.

Starter video: What Is an Alternative Investment Fund Manager? (AIFMD Overview)

12. Fund/Vehicle Structure & Investor Terms

What it is: Typical structures separate the manager (GP) from investors (LPs). Early tickets can use managed accounts; larger pools use fund vehicles (e.g., master■feeder).

Why it matters: Clear terms reduce negotiation friction and protect both sides.

Master:

- GP/LP basics; side letters; fees (management, performance, HWM, hurdles).

Build:

- Term sheet; PPM/LLP outline; subscription docs.
- Subscription/redemption SOP.

Measure:

- Time■to■close; % docs standardized; investor satisfaction.

Starter video: Hedge Funds – Structure, Strategies & Investor Access (GP/LP Basics)

13. Risk Framework (market, liquidity, counterparty, operational)

What it is: Define limits (exposure, VaR, MaxDD, concentration), pre■trade checks, stress scenarios, daily risk reports and escalation paths.

Why it matters: Prevents blow■ups and builds allocator trust.

Master:

- VaR, stress testing, leverage & concentration limits.

Build:

- Risk policy + daily 'risk pack' template.
- Kill■switch & escalation playbook.

Measure:

- Breaches/month; time■to■escalation; MaxDD vs. limit.

Starter video: Value at Risk (VaR) Explained in 5 Minutes

14. Execution Stack for A■Book (STP)

What it is: Choose Prime■of■Prime/LPs, route orders via FIX, monitor slippage/last■look, connect ECNs, and prove Best Execution with TCA.

Why it matters: Execution quality directly impacts performance and compliance.

Master:

- FIX basics; liquidity & last■look; ECN routing.

Build:

- LP scorecard; routing rules; TCA dashboard.
- Best■Execution policy & evidence collection.

Measure:

- Slippage vs. benchmarks (VWAP/TWAP/arrival).
- Fill rates; reject/last■look metrics.

Starter video: FIX Protocol Explained – The Backbone of Electronic Trading

15. Investment Process (Macro → Technical → Execution)

What it is: Move ideas through a research pipeline (hypothesis → data → test), size positions, construct the portfolio, and review on a set cadence. Document with an IPS.

Why it matters: Process beats opinion over time.

Master:

- Signal governance, sizing, portfolio construction.

Build:

- Investment Policy Statement (IPS).
- Model lifecycle SOP; 'idea■to■order' checklist.

Measure:

- Hit rate, payoff ratio, risk■adjusted returns; adherence to IPS.

Starter video: Investment Policy Statement — What It Is & Why It Matters

16. Data, Research & Infrastructure (OMS/EMS/PMS)

What it is: Select core systems (order, execution, portfolio), define data sources (macro data, COT, yields), and enforce versioning and monitoring with runbooks/BCP.

Why it matters: Reliable data & systems are prerequisites for scale.

Master:

- What OMS/EMS/PMS each does; basic data quality checks.

Build:

- Architecture diagram; data catalog + validation rules.
- Monitoring & backup/DR runbooks.

Measure:

- Uptime; data quality incidents; mean■time■to■restore.

Starter video: Electronic Trading Systems Architecture: OMS/EMS/PMS Overview

17. Middle/Back■Office & NAV Processes

What it is: Daily trade capture and broker/admin reconciliations; PnL attribution; cash/margin management; NAV calendar with four■eyes checks.

Why it matters: Keeps books clean and investors confident.

Master:

- Basics of fund accounting & NAV.

Build:

- Ops runbook; admin/auditor shortlist; monthly NAV calendar.

Measure:

- Breaks found/resolved; on■time NAV; reconciliation accuracy.

Starter video: NAV Cycle in Fund Accounting (Beginner■Friendly)

18. Compliance, Governance & Reporting

What it is: Implement AML/KYC/CTF, PA■dealing, insider/Wall■crossing, GDPR and recording requirements; prepare AIFMD Annex IV/PRIIPs/MiFID reports where applicable.

Why it matters: Compliance protects the business and enables distribution.

Master:

- AML/KYC basics; personal dealing & information barriers.

Build:

- Compliance manual; reporting calendar; control matrix; Board/IC charters.

Measure:

- Audit/regulatory findings; on■time reports; incident rate.

Starter video: AML Regulations in 2025 — Plain■English Overview

19. Fundraising & Investor Relations

What it is: Target LP types (HNW, family offices, allocators), set up a data room, package the track record and communicate KPIs with quarterly letters.

Why it matters: Professional IR shortens diligence cycles.

Master:

- What LPs expect in diligence; storytelling with data.

Build:

- Pitch deck; DDQ; reference data room (KPIs, policies, audits); CRM funnel.

Measure:

- Intro → DD rate; DD → commitment rate; time■to■close.

Starter video: How to Build an Investor Data Room (Elizabeth Yin)

20. Manager Business Model & Financial Planning

What it is: Model fees, costs (admin, audit, legal, data, tech, insurance), runway and hiring. Compare fee scenarios and provider quotes.

Why it matters: Numbers force trade■offs and prevent surprises.

Master:

- Unit economics, breakeven analysis, headcount planning.

Build:

- 24■month financial model; provider budget; staffing plan; KPI dashboard.

Measure:

- Runway months; GM/EBIT margins; plan vs actuals.

Starter video: Startup Financial Modeling — Tutorial & Template (Slidebean)