

## Case Study For a Financial Advisor based in Houston, Texas

LeadCenter.AI Full Service Digital Marketing  
Contract from March 2021 Until Now

### BACKGROUND

One of our major clients is a financial advisor firm based in Houston. We started our work with them in early 2021. Before that date, all their marketing effort to generate leads was offline through marketing events and mailer. But because of COVID19, they had to transform quickly to digital marketing to reach new clients and continue growing the firms. They contracted LeadCenter.AI to develop a digital go-to-market strategy and manage digital campaigns.

### GOALS

- 1) Double the revenue of the firm while reducing customer acquisition cost
- 2) Transform from traditional to digital Marketing
- 3) Scale from a local practice focused on Houston to a national financial advisor

## STRATEGY

1. End-to-End omni-channel digital marketing campaign using Google Ad, SEO, YouTube Ad, email marketing, and website development
2. ICP: Focus on qualified lead generation for individuals and family with more than \$0.5 Million in liquid savings nationwide
3. Products: retirement planning, investment management, and annuities

## RESULTS

### LEADCENTER.AI HELPED DRIVE

	2020	2021	2022 H1
AUM	\$280M	\$500M	\$800M
		%79	%60

ANNUITIES	\$60M in 12 months
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### 300% INCREASE IN QUALIFIED LEADS

	2020	2021	2022 H1
LEADS	900	2,900	2,500
		%222	%320

### EXPLOSIVE GROWTH OF VISITS

YouTube	1.7Mil	460%	Website	275K	215%
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### CUSTOMER ACQUISITION COST (CAC)

BEFORE	>\$5000	AFTER	< \$500	-90%
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## EXECUTION PLAN

- Managing all the digital marketing channels for the group including SEO, SEM (Google Ads), YouTube Ads, social media, and website development.
- Full implementation of End-to-End marketing campaign development, management and tracking using Google marketing platform including configuration of tagging using Google Tag Manager, integration with Google Analytics and setup of a multichannel conversion tracking, setting up the analytical reports and using Google Optimize for A/B testing and conversion monitoring, and integration with Google Ad.
- Focused on generating qualified leads of individuals with more than \$0.5 Million in liquid savings and convert to customers.
- Developed and executing both offsite and onsite SEO strategy and execution to increase ranking for strategic keywords. That resulted in increased traffic to the website by more than 215% in less than 6 months.
- Managed the website upgrade project to a modern theme with a focus on landing pages for conversion.
- Launched and managed the company's YouTube channel SEO optimization and paid campaign that resulted in increasing views by more than 460% from 300K views in 2020 to 1.7 million views in 2021. SEO strategy executed included both onsite and offsite optimization. For onsite, managed to increase Ahref audit score to 100% and Ahref ranking from 2 to 30 in less than 6 months.
- Managed the content development team to optimize the content and landing pages for SEO and Conversion. Directed and managed content optimization on all digital assets (Website blog, Newsletter, YouTube Channel) to increase organic traffic.
- Developed a Business Intelligence and lead Tracking dashboard to help measure the success of digital marketing campaigns. That included tracking leads channels (Google, YouTube, SEM, etc), lead mediums (phone, website forms, chats, and email) and measuring important conversions, Cost Per Lead, and Customer Acquisition Cost (CAC) per channel, etc.



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