



# LeadCenter.AI

The Lead Tracking and Engagement Platform for Financial Advisors



AI-powered lead management software to help financial advisors automate capturing and engaging leads to convert more leads to business



Financial Advisors Lead Tracking and Management Software



**600+**  
companies



**200,000+**  
leads captured



**25+**  
team members



**40,000**  
leads converted to  
appointments



**\$ \$2.5 Billion**  
in closed Assets Under  
Management in 2022



**\$800 Million**  
In sold annuities in 2022



CC Coaching & Consulting

# Problem



Low Conversion Rate from Leads to Paying Customers



## Tracking

Not able to track and capture leads from all sources



## Intelligence

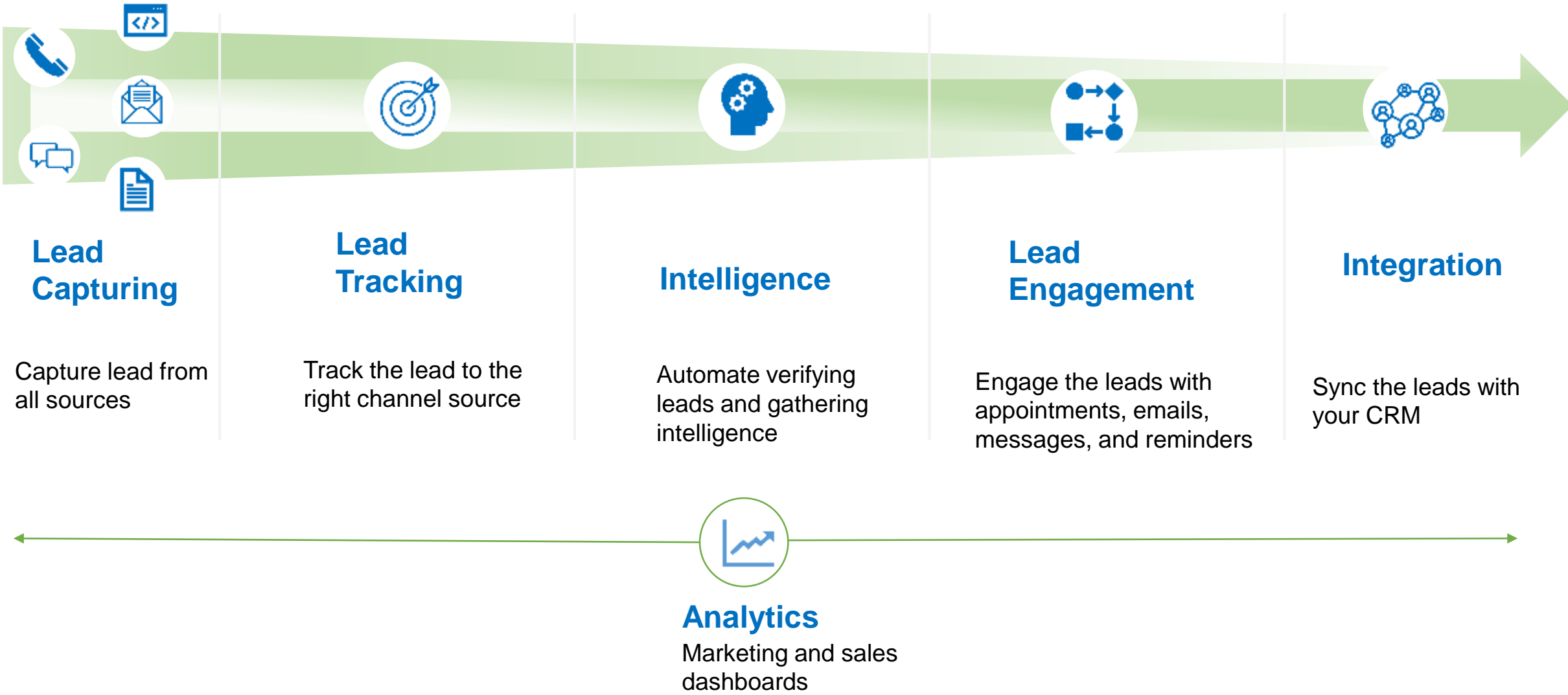
Not enough intelligence about each lead



## Engagement

Not responding to leads on time, which reduces conversions

# LeadCenter.AI



# Improve Conversion Rate from Leads to Business

LeadCenter users witnessed an improved conversion of leads to new customers from 3% to at least 10% in 2022



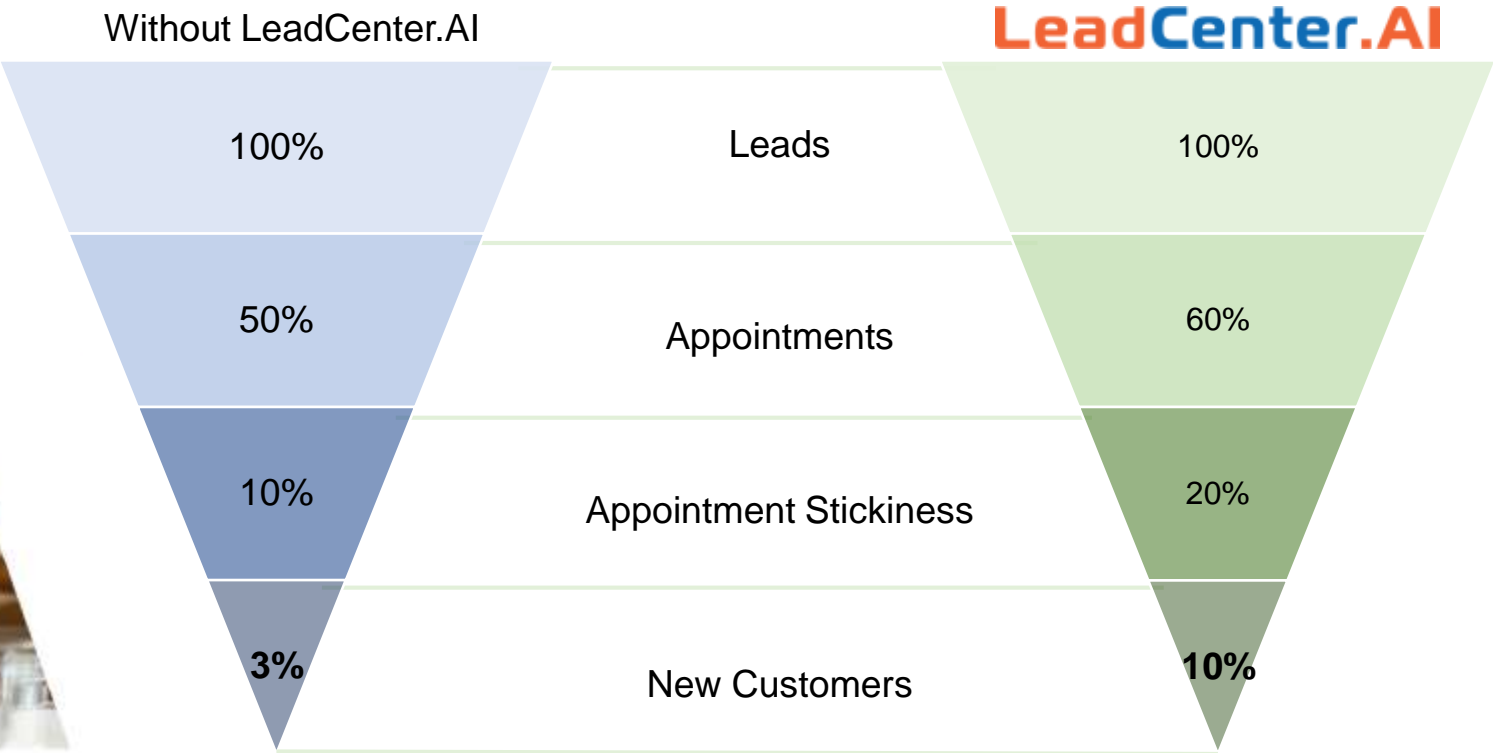
More Engagement



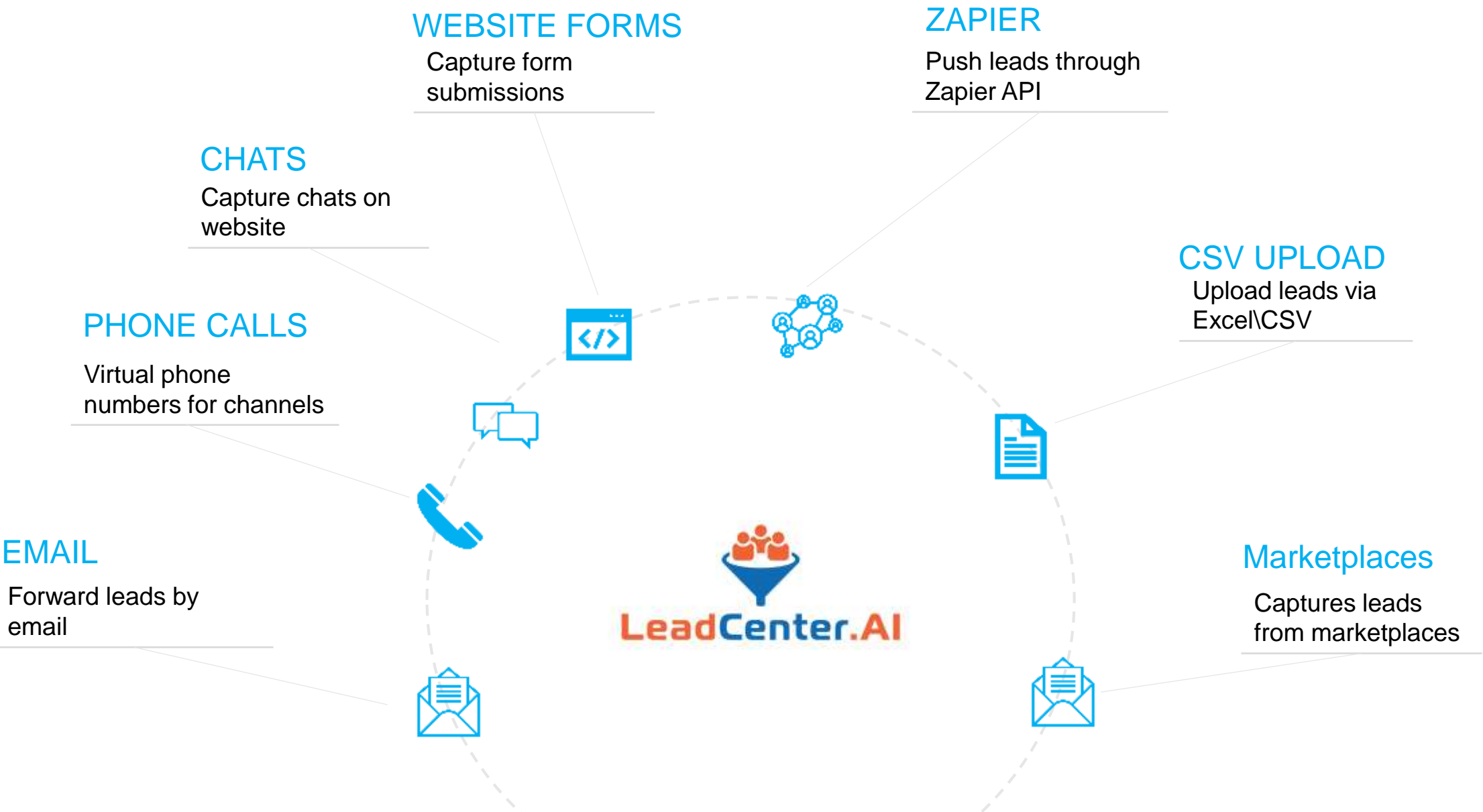
More Appointments



More Revenue

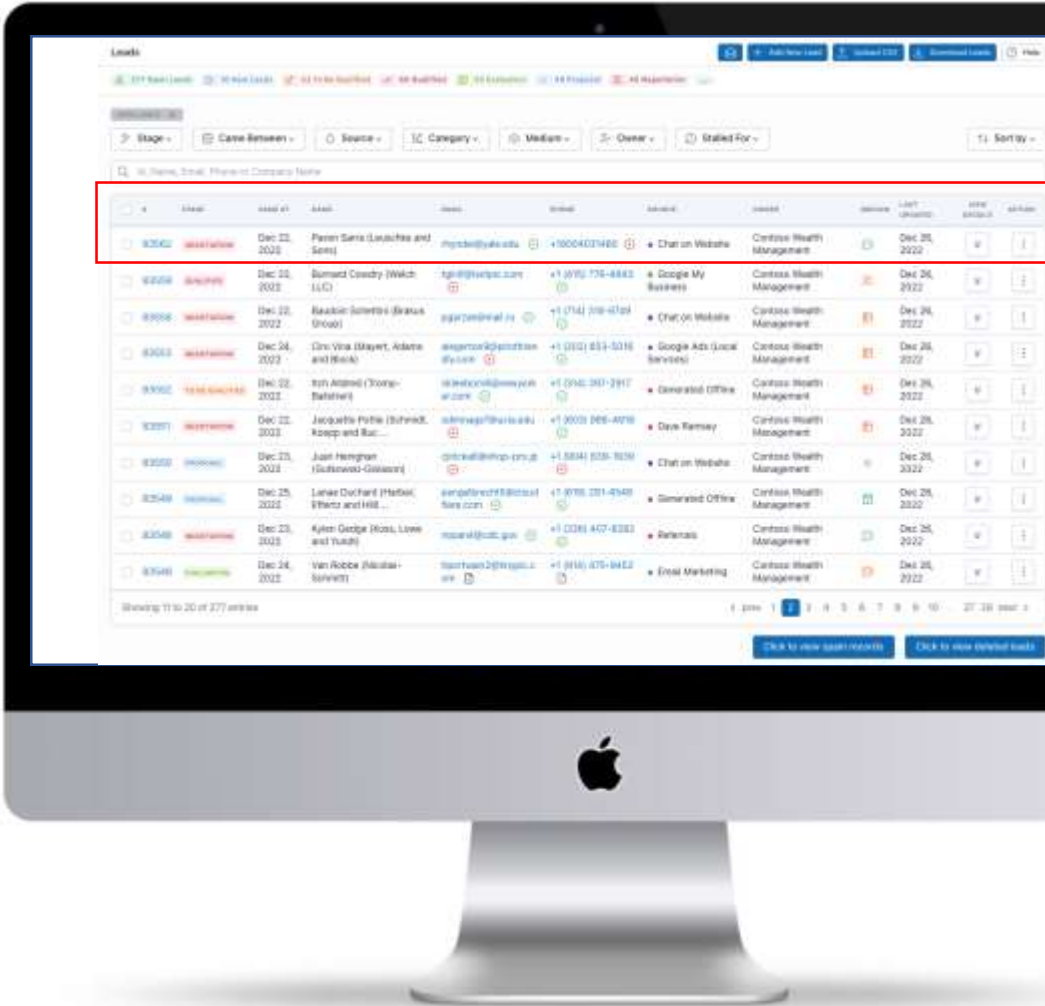


# Lead Capturing & Tracking





# Lead Capturing Screen Example



[Overview](#)
[Lead Intelligence](#)
[Form Data](#)
[Custom Fields](#)
[Comments](#)
[Tasks](#)
[Emails](#)
[Sms](#)
[Related](#)

Steve R,

[Update Details](#)
[Add Task](#)
[Add Comment](#)

Phone

(281) 908-7076

Email

steve@leadcenter.ai

Company

Address

United States

NEW

Dec 20, 2022

FIRST APPOINTMENT

Dec 20, 2022

Medium

Website Forms

Source

YouTube

Original Source

YouTube

Stage

First Appointment

Owner

Charles Rand

Category

Investment & Annuities

Lead Status

OPEN

Lead ID

175432

Came At

Tue, Dec 20, 2022 01:17 PM

(Central Time - US & Canada)

Last Updated

Tue, Dec 20, 2022 02:45 PM

(Central Time - US & Canada)

Pushed to Redial?

Yes

Redial Contact ID

34212

Appointments

Create Appointment

| DATE         | TIME  | SUBJECT          | STATUS    | TYPE    | ACTIONS |
|--------------|---|------------------|-----------|---------|---------|
| Jan 04, 2023 | 03:00 PM — 04:00 PM<br>(Central Time - US & Canada) | 1st Visit - Zoom | CONFIRMED | Virtual |         |

Lead Intelligence

Phone Intelligence

Phone Number

(281) 908-7076

Is Valid?

Yes

Type

mobile

Owner Name

Steve Ramadan

Phone Owner Type

Consumer

Carrier

Verizon Wireless

State

Texas

Email Intelligence

Email ID

steve@leadcenter.ai

Is Valid?

Yes

\* Phone number was verified through carrier at Dec 20, 2022.

\* Email was verified through provider at Dec 20, 2022.

Customer Enquiry

i am interested in info on the "cool retirement strategy" of index strategy with death and its features

Form Data

First Name\*

Steve

Last Name\*

R

Phone Number\*

(281) 908-7076

Email Address\*

steve@leadcenter.ai

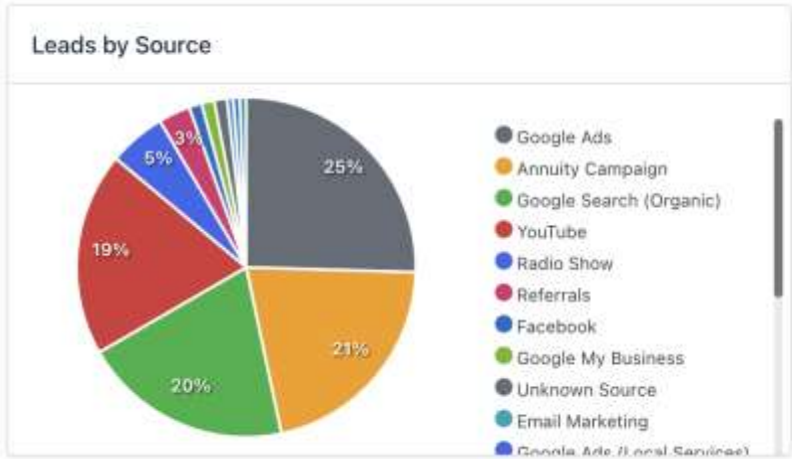
Message

i am interested in info on the "cool retirement strategy" of index strategy with death and its features

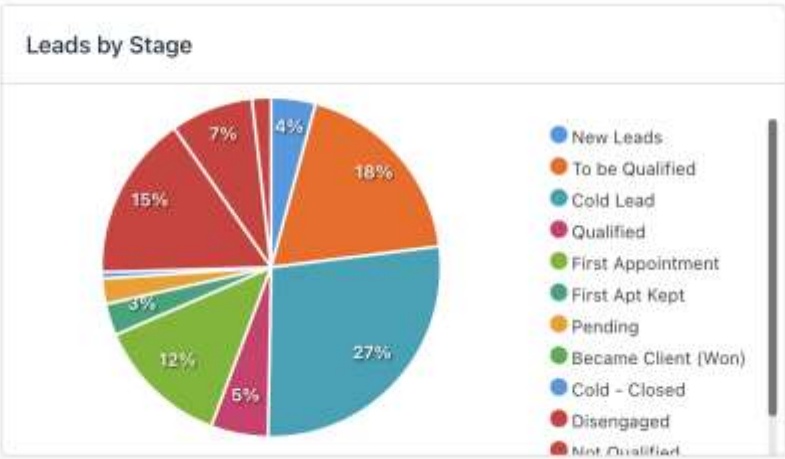


# Lead Tracking

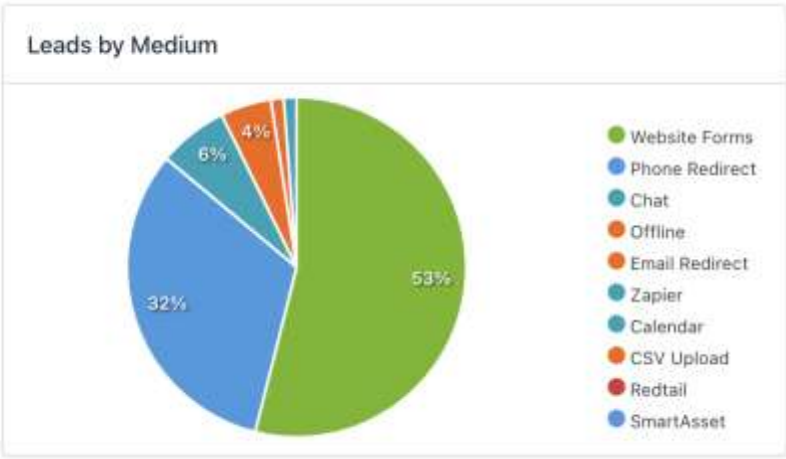
Track lead by Source, Stage, and Medium to know where to focus your sales resources



Sources



Stages



Medium

# Lead Intelligence

More than 19 data intelligence points are gathered about each lead



Phone

- Owner name
- Owner type
- Phone type
- Carrier name
- State
- Last date verified



Email

- Email verification
- Email open
- Email clicks
- Last date verified



Interactions

- Call recording
- Call transcription
- Email history
- Sms history
- Appointment history
- Previous leads



Source

- Lead source
- Lead medium
- Campaign
- Campaign terms
- Form name

# Lead Intelligence Screen Example

Lead Intelligence

Phone Intelligence

|                |           |        |               |                  |                  |       |
|----------------|-----------|--------|---------------|------------------|------------------|-------|
| Phone Number   | Is Valid? | Type   | Owner Name    | Phone Owner Type | Carrier          | State |
| (281) 908-7076 | Yes       | mobile | Steve Ramadan | Consumer         | Verizon Wireless | Texas |

\* Phone number was verified through carrier at Dec 20, 2022.

Email Intelligence

|                     |           |
|---------------------|-----------|
| Email ID            | Is Valid? |
| steve@leadcenter.ai | Yes       |

\* Email was verified through provider at Dec 20, 2022

Form Details

Form

Request a Consultation

Form

Url

<https://samplefinancialadviserwebsite.com/appointment>

|                           |                  |                           |
|---------------------------|------------------|---------------------------|
| Campaign Source           | Campaign Medium  | Campaign Name             |
| Google Ad                 | Form             | financial_advisor_near_me |
| Campaign Term             | Campaign Content |                           |
| Financial advisor near me | —                |                           |

# Lead Intelligence Screen Example 2

## Call Transcriptions

Phone Call Intelligence

| LEAD ID | CALL STATUS | CAME AT   | CALL DURATION        | PLAY RECORDING | CALL CONFIDENCE | CALL TRANSCRIPTION |
|---------|-------------|---|----------------------|----------------|-----------------|--------------------|
| 119279  | Accepted    | Tue, Dec 06, 2022 02:30 PM<br><small>(Central Time - US &amp; Canada)</small> | 3 minutes 51 seconds |                | 79.90%          |                    |
| 116473  | Accepted    | Tue, Oct 18, 2022 09:43 AM<br><small>(Central Time - US &amp; Canada)</small> | 1 minutes 44 seconds |                | 80.72%          |                    |

Call Transcription (Confidence: 80.72%)

Agent

Yeah. Actually I answered your call but in a different call but is there. This is regarding what

oh,

Customer

Yes, so we spoke last week. I am working with a different financial advisor. But I am looking for some one with a better experience to help me with estate planning.

Agent

Ok, let me ask you few questions first so I can schedule a consultation with one of our advisors

What are your current investable assets without real estate?

Customer

Around thirty million dollars

Agent

# Lead Intelligence Screen Example 4

Email open and clicks

TOTAL SENDS

977

TOTAL RECEIVED

8218

OPEN RATE

442

45%

CTR

147

15%

| LEAD ID | LEAD STAGE | SUBJECT  | FROM | TO | DATE                       | ATTACHMENT | OPENS | CLICKS | ACTION                |
|---------|------------|--|------|----|----------------------------|------------|-------|--------|-----------------------|
| 85169   | WON        | Still working on the plan                            |      |    | Thu, Jan 27, 2022 09:02 AM | —          | 145   | 0      | <a href="#">Reply</a> |
| 85169   | WON        | Jay: following up on our last coversation            |      |    | Sat, Feb 05, 2022 12:06 PM | —          | 138   | 0      | <a href="#">Reply</a> |
| 112794  | WON        | Water Restoration Website                            |      |    | Wed, Aug 24, 2022 07:11 AM | —          | 55    | 1      | <a href="#">Reply</a> |
| 91951   | NEW        | Re: followup   |      |    | Fri, Feb 11, 2022 06:47 AM | —          | 44    | 1      | <a href="#">Reply</a> |
| 99593   | LOST       | Thank you for contacting us.                         |      |    | Fri, Apr 01, 2022 06:20 PM | —          | 41    | 0      | <a href="#">Reply</a> |
| 03482   | WON        | Definitely Moving LLC Website Design and Development |      |    | Mon, Feb 14, 2022 05:08 PM | —          | 41    | 0      | <a href="#">Reply</a> |

# Lead Engagement

Improve conversion by improving lead engagements with tasks, appointments, email, SMS, and reminders

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## Appointments

Send meetings linked to leads



## Email

Send emails and track open and clicks



## SMS

Send and receive SMS's and track delivery



## Tasks

Create tasks for leads



## Automated Workflows

Automate lead actions



## Reminders

Automate sending appointment reminders to customers

# Integrations



## Zapier

Sync based on lead creation  
and update



## Redtail CRM

Sync contacts, appointments, and  
notes



## Email

Sync Email  
Sync Calendar (Q1 2023)



## Financial Advisor Marketplace

Sync based on email forward parser  
Sync based on API (Q2 2023)



# Redtail Integration



## Contacts

1. Automate capturing leads and pushing to Redtail as contacts without manual entry
2. Smart contacts push (Lookup contact in Redtail before pushing)
3. Custom fields mapping to Redtail system fields and user-defined fields



## Appointments

1. Two ways appointment sync
2. Appointment reminders by email and SMS
3. Maps to Redtail activity types
4. Public calendars for customers to book appointments in Redtail (coming Q1 2023)



## Lead Intelligence

1. Push call transcripts as contact notes
2. Push lead source, medium, form information, and form URL as contact notes

# Features List

| 1. Lead Tracking                |
|---------------------------------|
| Lead Tracking                   |
| Track forms                     |
| Track emails                    |
| Track chats                     |
| Track phone calls               |
| Lead via Zapier                 |
| Bulk upload leads via CSV       |
| Form builder                    |
| Landing page builder            |
| Local virtual phone numbers     |
| Toll Free virtual phone numbers |
| Link Duplicate leads            |

| 2. Lead Intelligence                              |
|---|
| Call recording                                    |
| Call transcription                                |
| Call id lookup (caller name, phone type, carrier) |
| Email verification                                |
| Lead source                                       |
| Lead medium                                       |
| Lead campaign                                     |
| Track email open and clicks                       |

| 3. Virtual Phone Numbers |
|--------------------------|
| Local phone numbers      |
| Toll Free phone numbers  |
| Call recording           |
| Assign phone to sources  |
| Inbound lead calls       |
| Send and Receive SMS's   |

# Features List – Continued 2

| 4. Calendars and Appointments                                 |
|---|
| account shared calendar                                       |
| Individual user calendar                                      |
| Resource scheduler view                                       |
| Calendar view   |
| Virtual\physical meeting setting                              |
| Business hours setting  |
| appointment confirmation email                                |
| Appointment reminders by email & SMS                          |
| Custom email and sms templates for confirmation and reminders |
| Public Calendar link (Q1 2023)                                |
| Redtail Calendar fields sync                                  |
| Two integration with Redtail Calendar                         |
| Two-way integration with Outlook & Gmail Calendar (Q1 2023)   |

| 5. Lead Engagement       |
|--------------------------|
| Email templates          |
| SMS templates            |
| Send and receive SMS's   |
| Send and receive Email's |
| Task management          |
| Assign lead owners       |

| 6. Lead Management          |
|-----------------------------|
| Custom lead stages          |
| Custom fields               |
| Custom actions              |
| Task management             |
| Assign lead owners          |
| Create tasks with reminders |
| Block spam emails and calls |
| Lead archiving system       |

# Features List – Continued 3

| 7. Analytics                             |
|--|
| Daily, weekly, monthly lead charts       |
| Leads by source, stage, and medium chart |
| Analytics Filtering                      |
| Mapping stages to sources chart          |
| Download to Excel                        |

| 8. Workflows                     |
|----------------------------------|
| Custom workflow on lead create   |
| Custom workflow on lead update   |
| Visual workflow design (Q2 2023) |
| Trigger SMS                      |
| Trigger email                    |
| Trigger lead update              |

| 9. Integration                        |
|---------------------------------------|
| Redtail contacts, calendar, and notes |
| Zapier                                |
| Smart Asset                           |
| Outlook                               |
| Gmail                                 |
| WordPress forms                       |

# Features List – Continued 4

| 10. Multi User                                      |
|---|
| Multi-users support                                 |
| Sync email for each user                            |
| Sync calendar for each user                         |
| Owner, admin, editor, and viewer permission support |
| Manage multiple accounts by a single user           |

| 11. Notifications                                 |
|---|
| Lead notification by email                        |
| Daily, weekly, and monthly leads reports by email |
| Call transcription notification                   |
| SMS received notification                         |
| Add up to 5 emails for each notification          |

# Features List – Continued 5

| 12. Website Builder         |
|-----------------------------|
| Custom domain               |
| Themes and templates        |
| Landing page builder        |
| Custom form builder         |
| Header and footer builder   |
| Media and images            |
| Blog builder                |
| Automatic redirects builder |
| Advanced styling            |
| Typography                  |
| Advanced coloring           |
| Custom CSS                  |
| Custom javascript           |
| Unlimited hosting           |
| Unlimited bandwidth         |

| 13. Page Builder                       |
|--|
| Visual builder                         |
| 500+ prebuilt components               |
| SEO options                            |
| Landing page without header and footer |
| Custom coding window                   |
| Build page from templates              |

| 14. Forms Builder      |
|------------------------|
| Visual form builder    |
| Custom fields          |
| Field validation rules |
| Custom actions         |
| Custom tracking        |

# LeadCenter Support

- Assistance in setting up lead management software and integration
- Assistance in setting up a website, landing pages, and forms
- Consulting and training
- Unlimited email support
- Unlimited phone support





# Pricing


|                     |         |
|---------------------|---------|
| Lead Center License | Monthly |
|---------------------|---------|

|  |      |
|--|------|
|  Per User License | \$20 |
|--|------|

|         |         |
|---------|---------|
| Add-Ons | Monthly |
|---------|---------|

|  |     |
|--|-----|
|  Local phone number | \$5 |
|--|-----|

|  |      |
|--|------|
|  Toll-free phone number | \$10 |
|--|------|

|   |      |
|---|------|
|  Website builder and hosting | \$25 |
|---|------|

|                  |
|------------------|
| Add-On per Usage |
|------------------|

|                                      |                     |
|--------------------------------------|---------------------|
| Call recording                       | \$0.0075 per minute |
| Phone call transcriptions            | \$0.14 per minute   |
| Email verification                   | \$0.025 per email   |
| Phone lookup (caller identification) | \$0.045 per lookup  |

# Demo

- Register for Free at <https://app.leadcenter.ai/register>



# Contact Us



[\(888\) 291-7116](tel:(888)291-7116)



[support@leadcenter.ai](mailto:support@leadcenter.ai)



[www.leadcenter.ai](http://www.leadcenter.ai)