



# 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

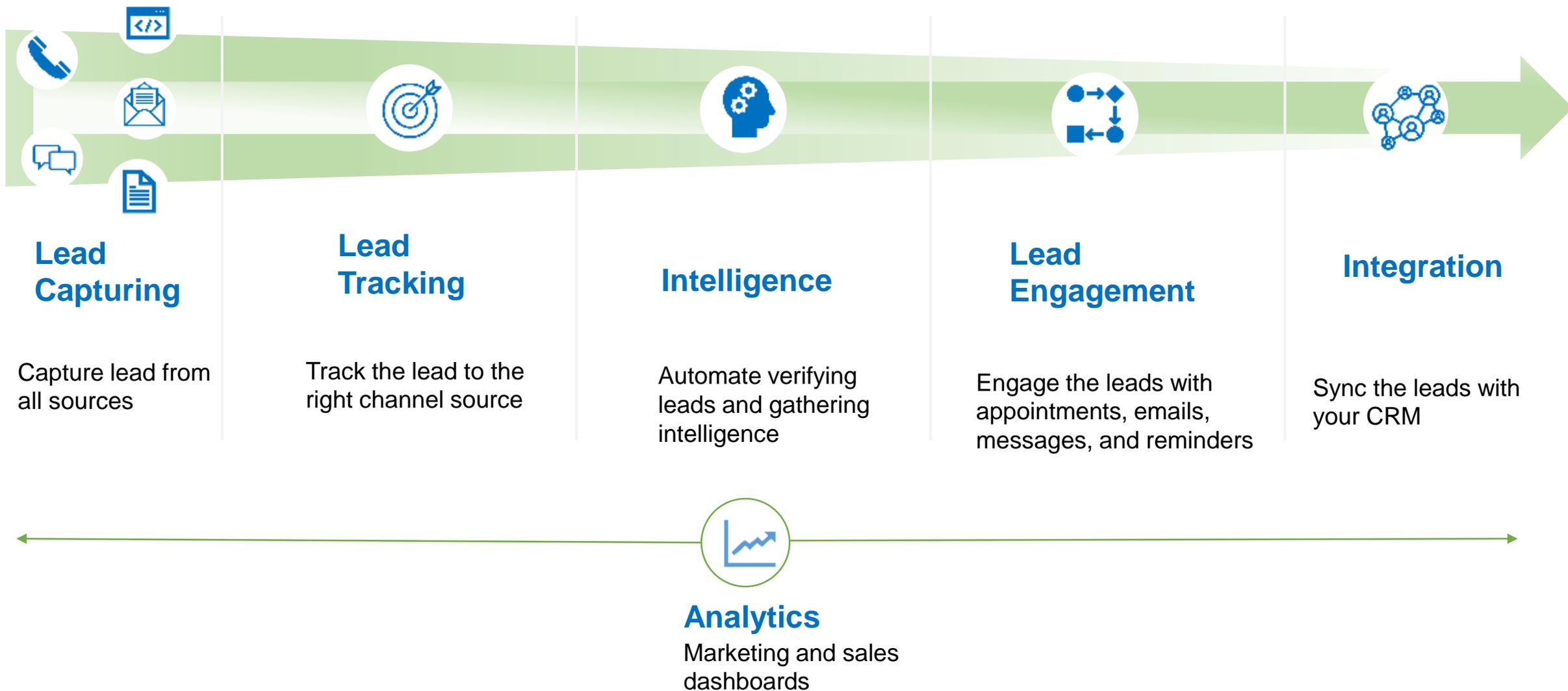
Not enough intelligence about each lead



## 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



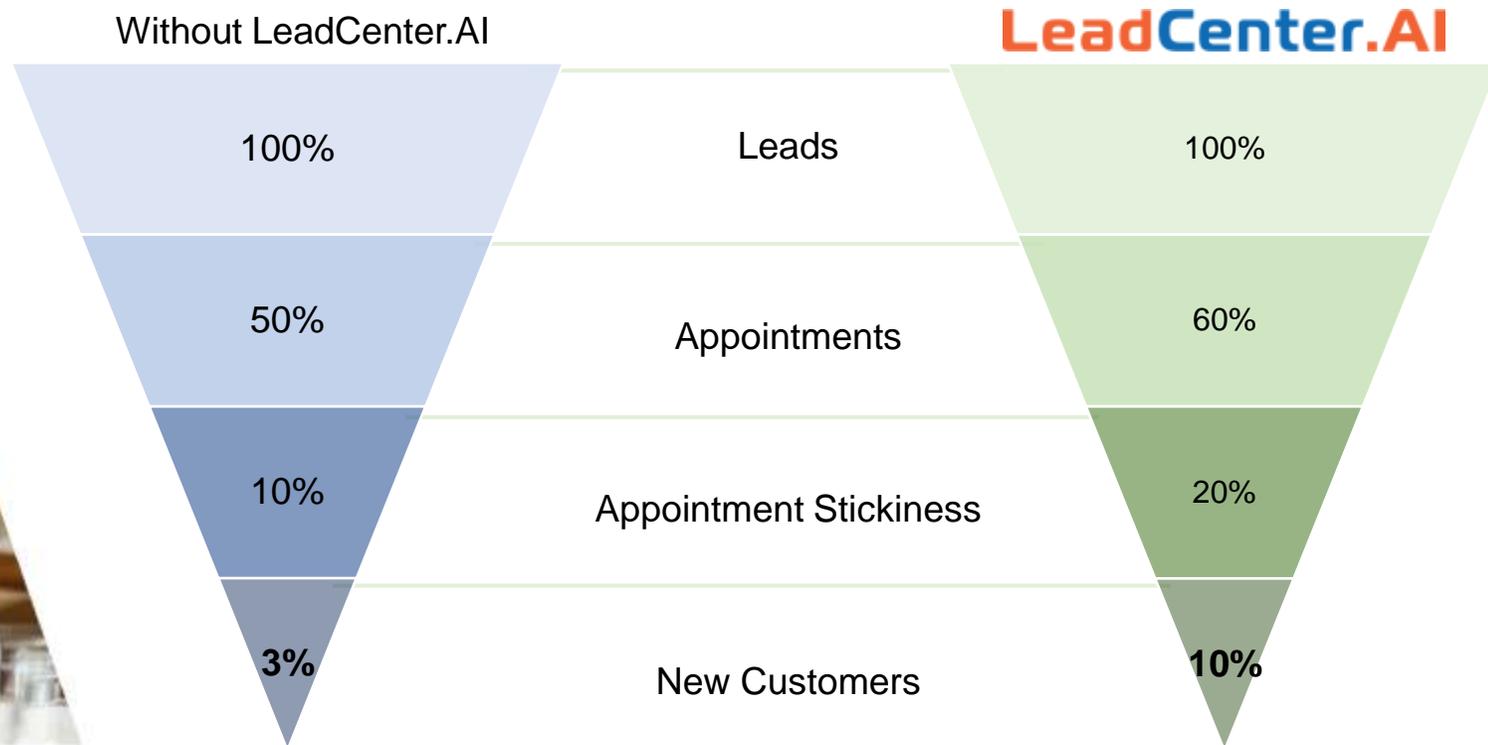
More Engagement



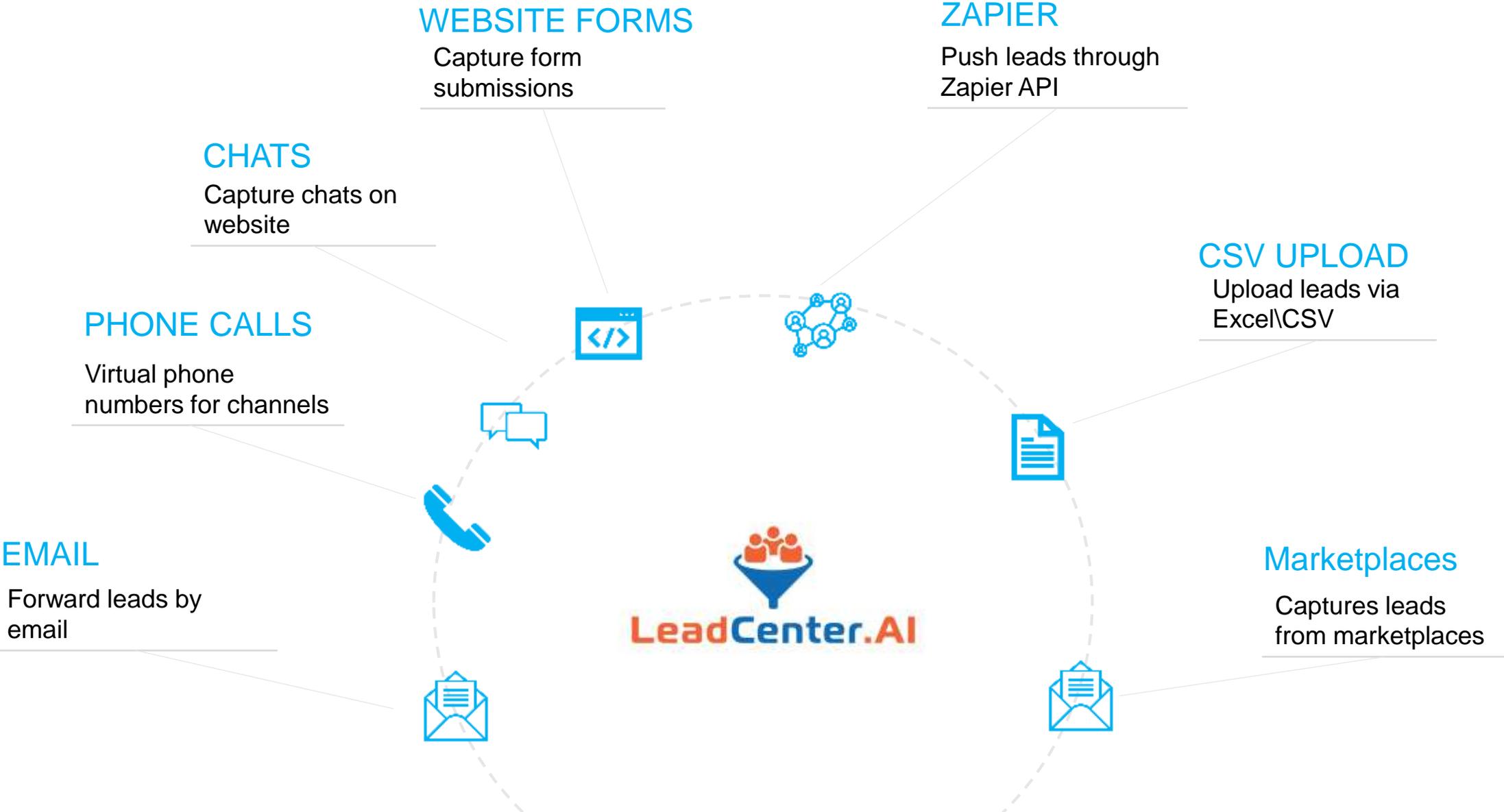
More Appointments



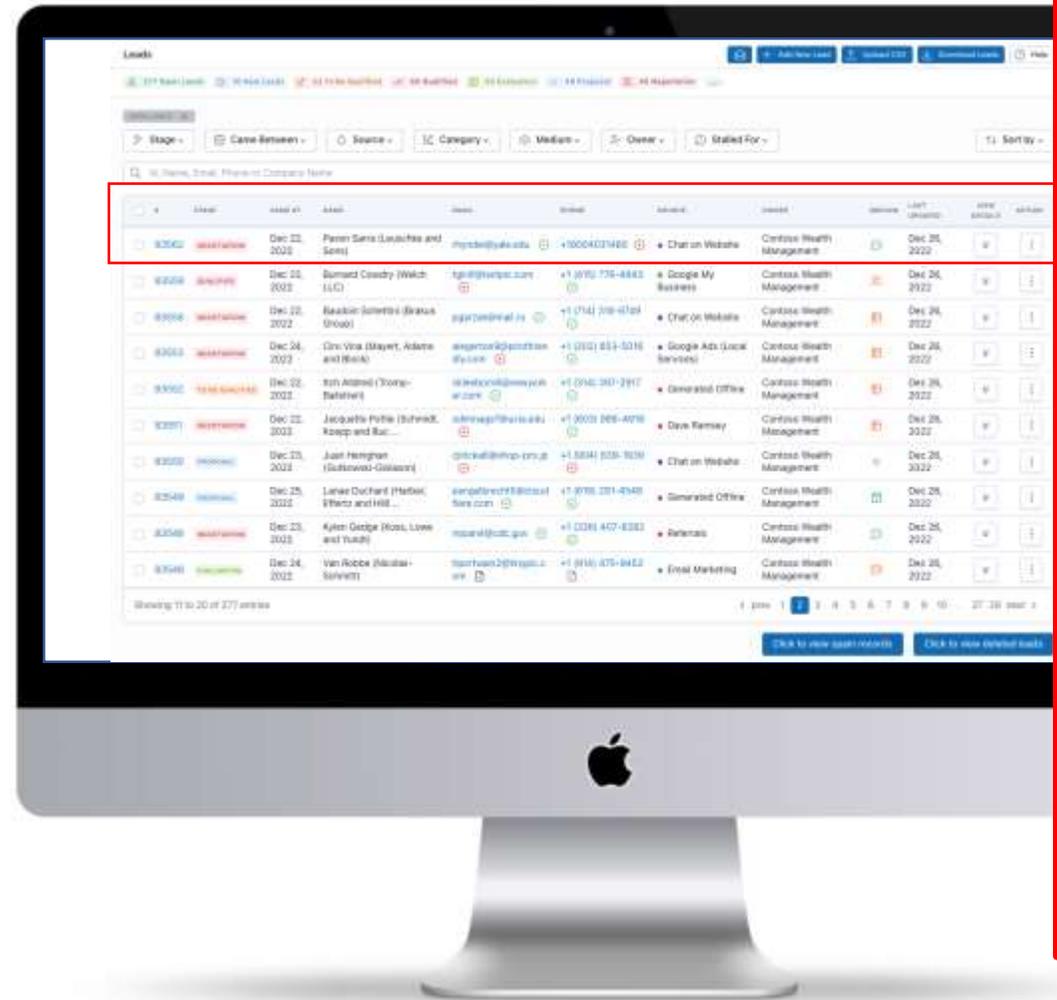
More Revenue



# 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 → FIRST APPOINTMENT  
Dec 20, 2022 → 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 | Come 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 Reddit?: Yes | Referral Contact ID: 34212

#### Appointments

Create Appointment

DATE	TIME	SUBJECT	STATUS	TYPE
Jan 04, 2023	03:00 PM – 04:00 PM (Central Time - US & Canada)	1st Visit - Zoom	CONFIRMED	Virtual

#### Lead Intelligence

Phone Intelligence							Email Intelligence	
Phone Number	Is Valid?	Type	Owner Name	Phone Owner Type	Carrier	State	Email ID	Is Valid?
(281) 908-7076	Yes	mobile	Steve Ramadan	Consumer	Verizon Wireless	Texas	steve@leadcenter.ai	Yes

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

#### Customer Enquiry

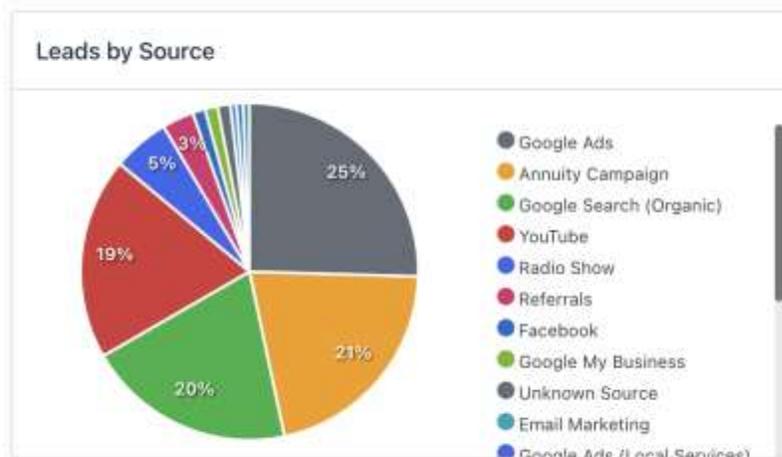
I am interested in info on the "cool retirement strategy" of index strategy with death and its features

#### Form Data

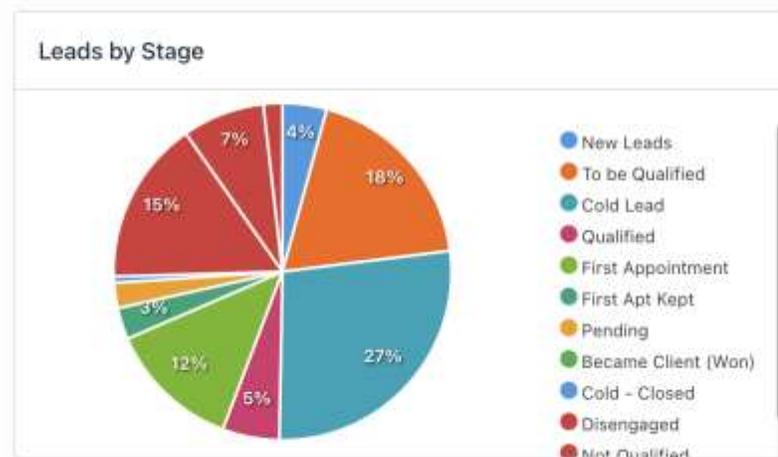
First Name* Steve	Last Name* R	Phone Number* (281) 908-7076
Email Address* steve@leadcenter.ai	Message I am interested in info on the "cool retirement strategy" of index strategy with death and its features	

# Lead Tracking

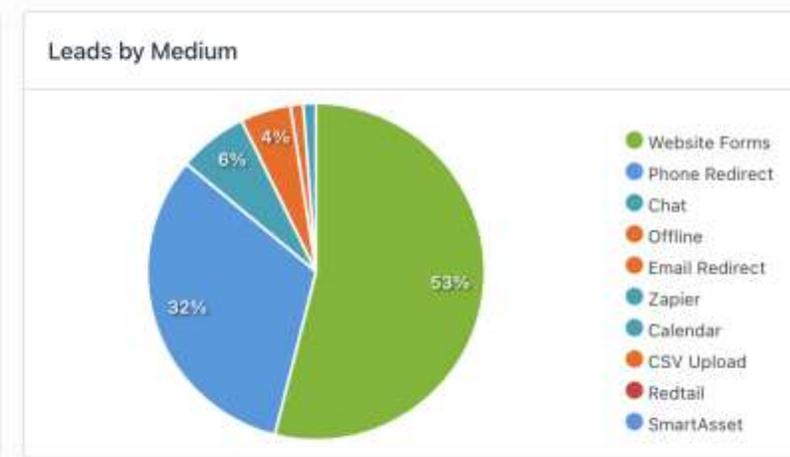
Track lead by Source, Stage, and Medium to know where to focus your sales resources



Sources



Stages



Medium

# Lead Intelligence

More than 19 data intelligence points are gathered about each lead



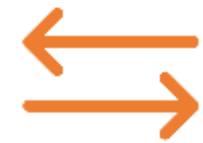
## Phone

- 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	Campaign Source	Campaign Medium	Campaign Name
Request a Consultation Form	Google Ad	Form	financial_advisor_near_me
Url	Campaign Term	Campaign Content	
<a href="https://samplefinancialadviserwebsite.com/appointment">https://samplefinancialadviserwebsite.com/appointment</a>	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 (Central Time - US & Canada)	3 minutes 51 seconds		79.90%	
116473	Accepted ⓘ	Tue, Oct 18, 2022 09:43 AM (Central Time - US & Canada)	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 <b>977</b>		TOTAL RECEIVED <b>8218</b>		OPEN RATE <b>442</b> <span style="color: green;">45%</span>		CTR <b>147</b> <span style="color: green;">15%</span>			
LEAD ID	LEAD STAGE	SUBJECT	FROM	TO	DATE	ATTACHMENT	OPENS	CLICKS	ACTION
85169	WON	Still working on the plan	[REDACTED]	[REDACTED]	Thu, Jan 27, 2022 09:02 AM	—	145	0	<a href="#">Reply</a>
85169	WON	Jay: following up on our last coversation	[REDACTED]	[REDACTED]	Sat, Feb 05, 2022 12:06 PM	—	138	0	<a href="#">Reply</a>
112794	WON	Water Restoration Website	[REDACTED]	[REDACTED]	Wed, Aug 24, 2022 07:11 AM	—	55	1	<a href="#">Reply</a>
91951	NEW	Re: followup	[REDACTED]	[REDACTED]	Fri, Feb 11, 2022 06:47 AM	—	44	1	<a href="#">Reply</a>
99593	LOST	Thank you for contacting us.	[REDACTED]	[REDACTED]	Fri, Apr 01, 2022 06:20 PM	—	41	0	<a href="#">Reply</a>
03488	WON	Definitely Moving LLC Website Design and Development	[REDACTED]	[REDACTED]	Mon, Feb 14, 2022 08:08 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
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 Per User License	\$20
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Add-Ons	Monthly
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 Local phone number	\$5
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 Toll-free phone number	\$10
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 Website builder and hosting	\$25
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Add-On per Usage
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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



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