



Case Study

An integrated platform for integrated operations

BACKGROUND

- Founded in 2010
- 50 employees, including 15 advisors

PROFILE

- Client: Oak Harvest Financial Group
- Location: Houston, Texas
- Description: Financial Advisor and Wealth Management
- AUM: \$1 Billion
- Implementation Year: 2021

Oak Harvest Financial Group was founded in 2010 with a singular focus: serving the interests and well-being of our clients. We take the time to listen to and understand each client's unique story and needs, delivering data-driven, personalized solutions. This level of customization and commitment is rare in the industry. With a holistic approach built on tailored money management, fair and transparent fees and commissions, and proactive client service, we help our clients achieve their financial goals.

In 2021, Oak Harvest adopted LeadCenter.AI to automate marketing & scheduling. The platform enabled automated lead capturing, streamlined the sales pipeline, and facilitated the progression of new business through various stages.

Some of the challenges LeadCenter helped Oak Harvest resolve:

- Before LeadCenter, we used silos of apps that did not integrate, leading to inefficiencies across teams.
- Manual data entry for tracking leads, appointments, and production consumed hundreds of hours annually.
- Significant time was spent each month manually preparing reports.
- Administrative workload increased instead of allowing the team to focus on sales growth.
- Reliance on paper-based financial questionnaires, slowing down processes.
- Lack of real-time access to key performance indicators (KPIs) hindered quick decision-making.

BENEFITS

- Increased revenue through higher conversion rate of sales to business.
- Reduced no-show rates for appointments and seminars.
- Real-time tracking of key performance indicators (KPIs).
- Lower operational costs by reducing administrative workload for data entry and report preparation.
- Reduced technology costs by using an integrated platform, eliminating the need for additional tools and integrations.

USAGE

- CRM
- Marketing automation
- Sales automation
- Seminar management
- Scheduling management
- Production tracking
- Executive reporting

"Over the past four years, we have partnered with LeadCenter.AI to expand its platform, ensuring it supports the entire lifecycle of our client journey. Today, we use LeadCenter.AI to automate marketing, sales, operations, and reporting at Oak Harvest Financial Group."

– Troy Sharpe, CEO and Founder,
Oak Harvest Financial Group



“From the beginning, we knew that this tool was different. The team behind it is adaptable and responsive to meet the needs of a scaling RIA.”

Troy Sharpe
- CEO and Founder

LeadCenter Usage in Oak Harvest

Today we use LeadCenter.AI across the entire customer journey including:

1. Marketing automation to manage campaigns, seminars, email, and text marketing.
2. Automated lead capturing from multiple channels and mediums like phone calls, text messages, and form submissions.
3. Sales pipeline management, allowing us to engage prospects using pre-defined templates.
4. Automated financial questionnaires that prospects complete, automatically populating the CRM with accurate data.
5. Scheduling assistance and reminders to streamline appointment management.
6. Production tracking and forecasting for improved decision-making.
7. Executive reporting to monitor key performance indicators (KPIs) across the business.

Data Insights

With LeadCenter, we now have real-time data insights across all departments. The tool includes over 50 reports covering marketing, appointments, executive KPIs, and production. Since all the data is housed within a single integrated platform, reports provide a complete view of our business. For example, within the appointment reports, we can analyze marketing channels, production data, and average case size for each appointment.

Before LeadCenter, generating these insights required hundreds of hours of manual data entry and report preparation. Now, everything is available in real-time, freeing up resources for growth-focused activities.



Marketing



Sales



Operations



Advanced analytics and reporting

Marketing Decisions

With LeadCenter, we instantly assess the performance of our marketing campaigns. The tool not only attributes leads to specific campaigns, but also tracks appointments booked, production generated, customer acquisition cost (CAC), and ROI per channel. This enables faster data-driven marketing decisions, allowing us to allocate budgets to high-performing campaigns while identifying and improving low-converting sources.

One Integrated Marketing, Sales, and Operations

One of the major benefits of LeadCenter.AI, is that it unifies our entire company under one platform. Advisors can see real-time prospect interactions across various campaigns. The marketing team tracks sales engagement and assess campaign performance based on real-time conversion metrics. This seamless integration enables better decision-making and enhances overall efficiency.



“LeadCenter provided tighter integration between marketing, business development, and operations by using a single, integrated platform instead of silos of apps. The tools saved us hundreds of hours each year on report preparation while delivering the insights we needed.”

Megan Scheff
-Marketing Director

Our marketing department operates a multichannel strategy, including digital marketing, seminars, events, and radio.

Before 2020, We primarily generated leads through referrals and seminars. However, with COVID-19, we had to adapt as in-person seminars were no longer an option. As a result, we expanded our digital marketing efforts, leveraging YouTube, webinars, Google Search, and other online channels.

“The challenge with a multichannel strategy—especially digital—is the need for tools that can accurately attribute leads to the right marketing channels.”

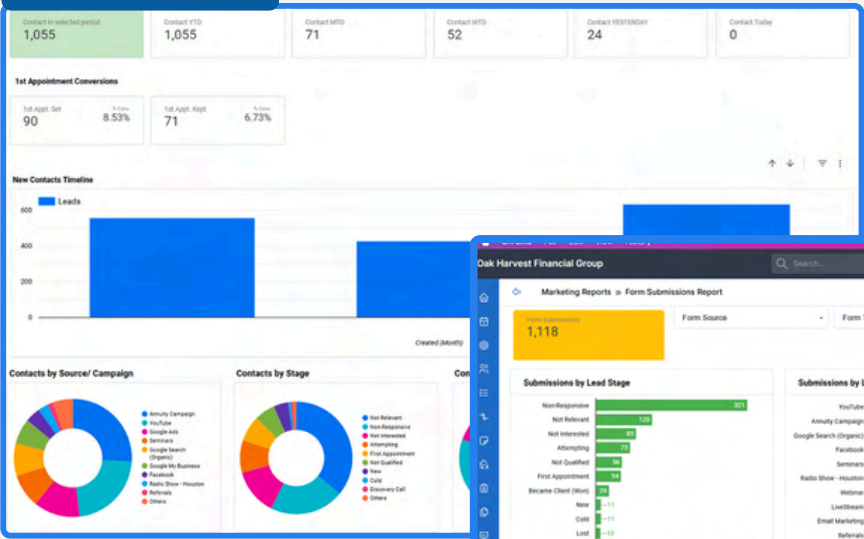
Marketing challenges before LeadCenter

- Inability to attribute leads to specific campaigns.
- Lack of tracking for marketing performance by channel.
- Sales and operations teams had no visibility into customer interactions with marketing campaigns.
- Time-consuming marketing report preparation at the end of each month.

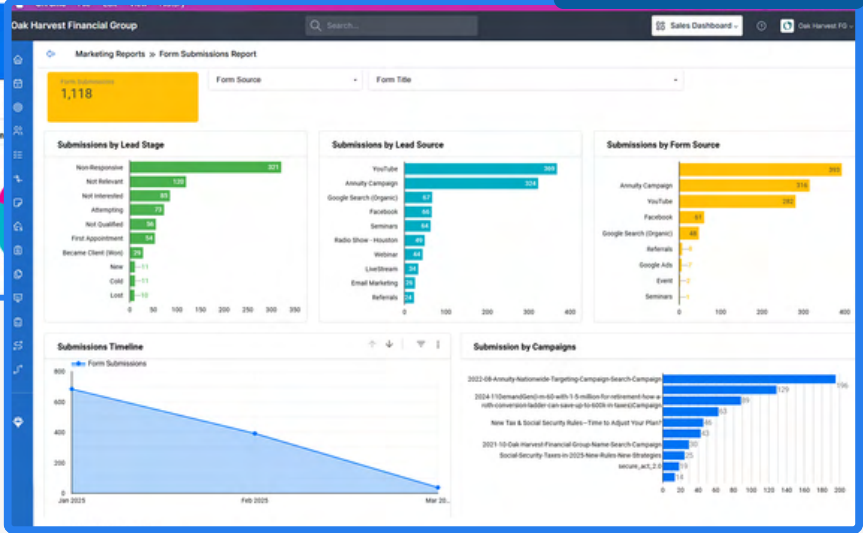
How LeadCenter helped us

- Automated lead capturing and accurate attribution to marketing channels.
- Enhanced visibility into customer interactions across marketing campaigns, including phone calls, events, form submissions, emails, and text messages—making data easily accessible to sales and operations.
- Automated tracking of marketing expenses and their impact on business production.
- Real-time access to marketing business intelligence and KPIs—eliminating hours of manual reporting each month.

Sales pipeline report



Form submission report





“Before LeadCenter, I spent most of my time managing event logistics and preparing reports. Now, I can manage more events without requiring additional resources. I no longer waste time on report preparation since the data is instantly available.”

Heather Tutor
-Event Manager

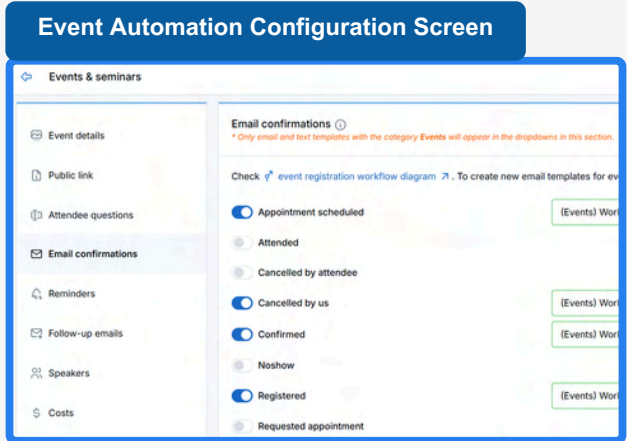
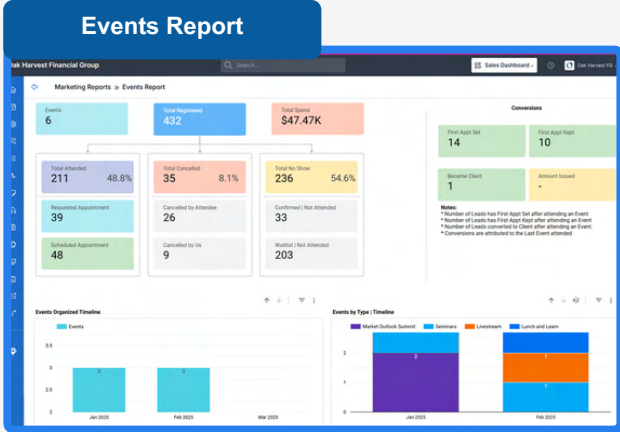
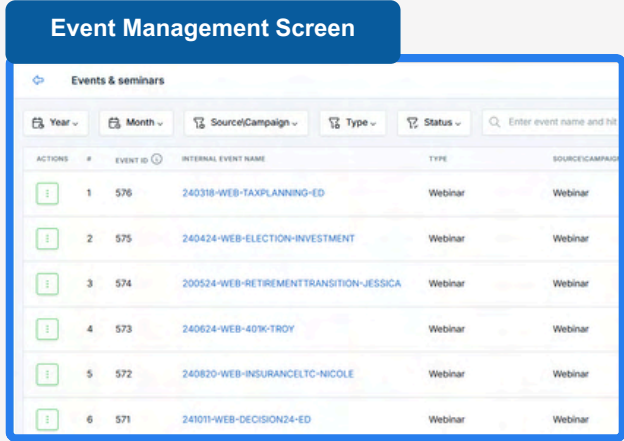
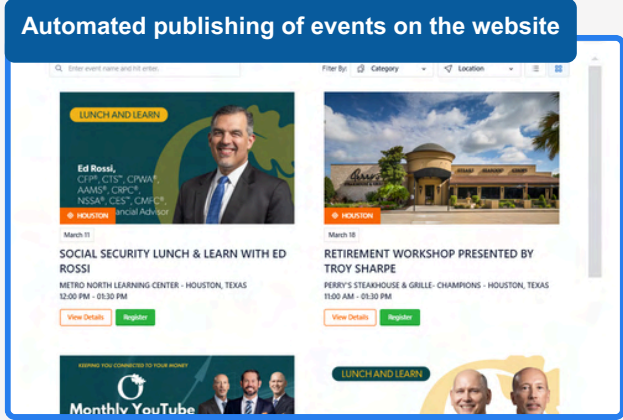
Events and seminars are key channels for Oak Harvest to connect with clients and prospects, understand their needs and strengthen community engagement. In 2024, we hosted over 36 events, including seminars, client appreciation events, charity events, and summits.

Previously, we spent significant time managing event logistics, including:

- Creating landing pages and registration forms on our website.
- Managing event attendee workflows and follow-up reminders.
- Entering event data into reports and distributing leads to business development

How LeadCenter transformed our event process

- Automates the creation of landing pages and registration forms for each event.
- Automates confirmation and reminder emails/SMS using pre-built templates.
- Automates sending of post-event follow-up emails based on attendee status.
- Tracks past event attendance history for improved engagement.
- Monitors event spending and calculates ROI for better financial oversight.
- Generates event reports automatically to save time.
- Automatically adds new contacts to the sales pipeline with proper attribution, accelerating business development efforts.
- Directly integrates with Leading Response, Lead Jig, Financial Seminar Services, and Big Marker.





“With LeadCenter, we are increasing our sales team’s productivity and enabling them to focus on what matters most—having insightful conversations with our clients.”

Mike Stuart
-Chief Sales Office

“Oak Harvest’s core sales team consists of 15 advisors, 4 business development specialists, and 6 support staff in operations, onboarding, and customer service—serving over 3000 clients. In 2024 alone, my team managed more than 4,970 meetings with clients and prospects, processed over 7,142 leads, and onboarded more than 200 new families.”

Sales challenges before LeadCenter

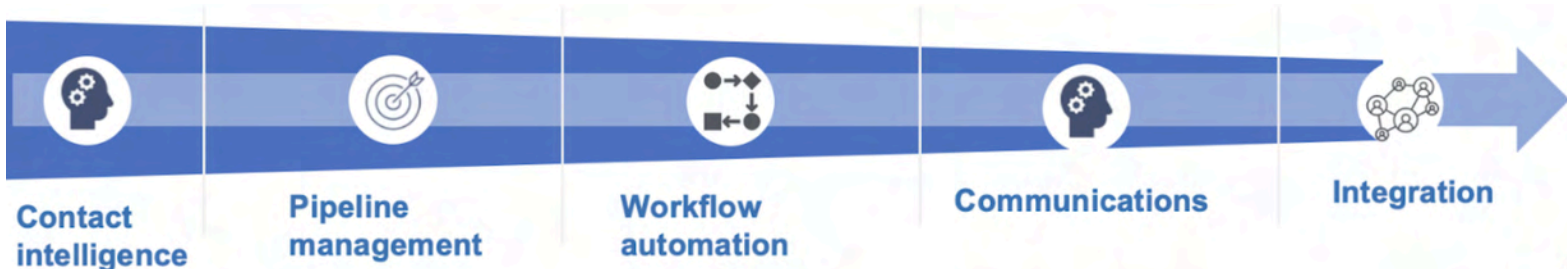
Previously, our sales process was burdened by inefficiencies, making it difficult to scale. Some key challenges included:

- Marketing operated in a silo, using tools that didn’t integrate with our CRM.
- Our previous CRM was a system of record, not a system for engagement. It lacked automation for client interactions, appointment scheduling, reminders, email and text messaging, and workflow automation.
- Sales reporting was manual and delayed. It required significant hours each month to generate insights into our sales efforts.

How LeadCenter improved our business development

With LeadCenter, Oak Harvest now has real-time access to the sales pipeline, enabling faster and more efficient sales engagements with prospects. The business development team can now:

- Access detailed marketing campaign data for each lead.
- Instantly retrieve lead intelligence to improve engagement.
- Engage leads directly through the platform via calls, pre-approved email templates, and text messages.
- Schedule appointments seamlessly or automate scheduling by sending public calendar links to allow prospects to book their own discovery calls.



How LeadCenter improved advisor productivity

Since implementing LeadCenter, we’ve experienced a significant boost in advisor efficiency and productivity. Prospects receive notifications to fill out a financial questionnaire before their first appointment. The entire sales process is automated—from booking appointments and sending reminders to prompting prospects to complete the financial questionnaire and capturing their data in the CRM. This allows advisors to focus on retirement planning and having more meaningful conversations with clients.



“With 4,970 meetings with prospects and clients in 2024 alone, LeadCenter plays a critical role in automating the entire client meeting experience.”

Chris Ayers

-Vice President of Operations

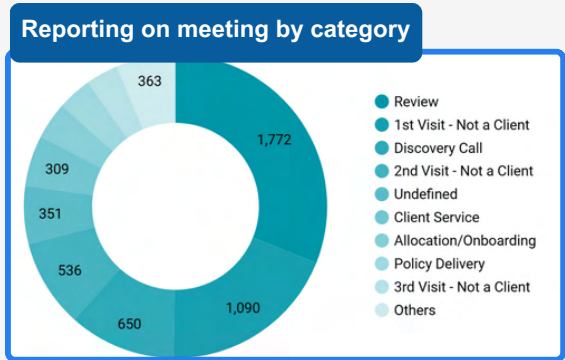
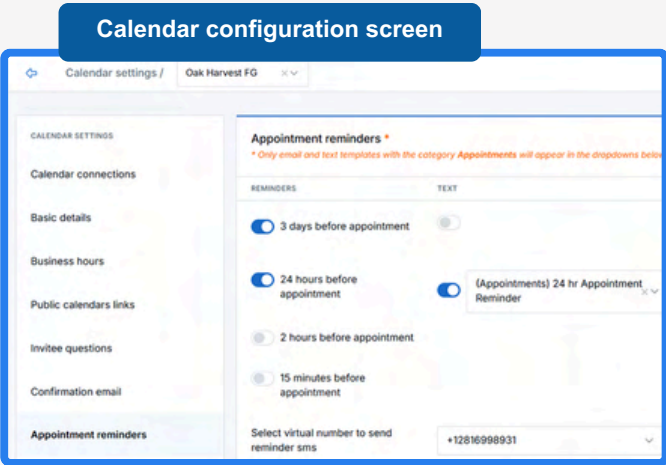
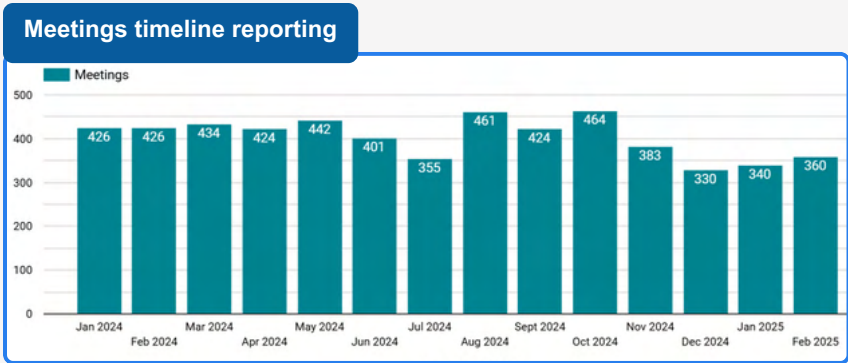
Operational excellence is a core value for Oak Harvest Financial Group’s operations department. With over 3,000 customers and 6,000 inbound leads annually, the operations team is responsible for managing the scheduling of client-facing meetings.

Scheduling challenges before LeadCenter

- As Oak Harvest scaled, we had to allocate more resources to scheduling. Ensuring timely client reviews and high show rates for prospect meetings became increasingly difficult.
- Our previous CRM lacked scheduling automation, forcing the team to manually handle confirmations and reminders, increasing administrative workload.
- Appointment tracking required significant time & effort. We relied on offline Excel sheets to generate reports for management, consuming valuable time and resources.

How LeadCenter transformed our scheduling process

- Provided public booking calendars for each business development specialist and advisor via BookmyTime.ai, allowing prospects and clients to schedule appointments directly.
- Eliminated scheduling friction and improved deal momentum throughout the sales cycle.
- Automated confirmation emails and reminders via email and SMS using custom templates that we built in LeadCenter, reducing no-shows and last-minute reschedules.
- Automated client review reminders, ensuring clients receive a reminder one month before their due date to schedule their own review.
- Automated reporting, providing management with real-time key performance indicators (KPIs)—eliminating hundreds of hours spent annually on manual report preparation.





“With LeadCenter, we’ve eliminated manual spreadsheets and now track production in real-time, saving hundreds of hours annually while providing our executive team with the insights they need to drive growth.”

Larisa Kutac

-Senior Client Services Specialist

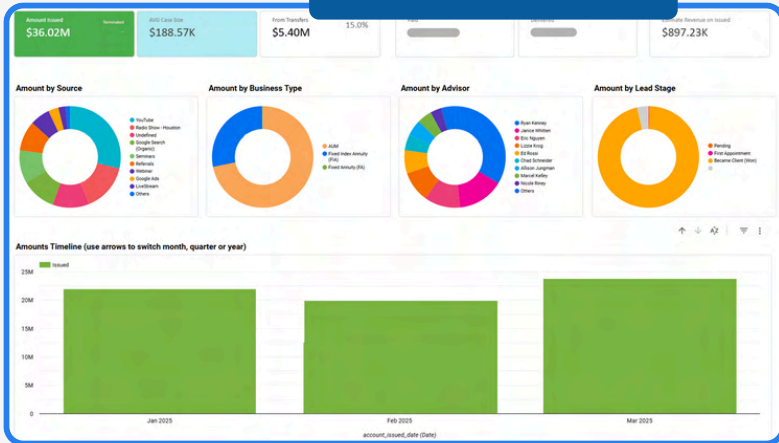
Oak Harvest manages over \$300 million in annual production, requiring a seamless and accurate tracking system for AUM, annuity commissions, and advisor payouts. Before LeadCenter, our team relied on standalone Excel sheets disconnected from our CRM and marketing systems, leading to inefficiencies in tracking, forecasting, and reporting.

With LeadCenter, production tracking is now an integral part of our CRM. This allows marketing, sales, and operations to manage all data in one connected system, creating a seamless workflow across departments and bringing the entire company together.

How LeadCenter streamlined our production tracking

- Integrated production tracking directly within our CRM, eliminating fragmented data sources.
- Enabled real-time access to production data, reducing time spent on manual tracking.
- Provided forward-looking insights into forecasts and profitability, streamlining financial and business planning.
- Expanded visibility beyond production reports—data is now reflected in leads, appointments, seminars, and other key reports in LeadCenter.

Production Tracking Report



Financial Account settings Screen

The settings screen is organized into several sections:

- Basic Settings:** Includes Calendars, Contact Capturing, Database Lists, Phones and texts, AUM & Insurance Settings, Workflows & Templates, Security Management, and Website Builder.
- AUM and Insurance Settings:**
 - Advisors commission plans
 - Financial planning products
 - AUM Settings:** Asset types, AUM fees, Custodians, AUM product types, AUM products.
 - Insurance Settings:** Wholesale providers, Insurance companies, Insurance products, Insurance product commissions.

Account Management Screen

ACTIONS	ACCOUNT ID	NAME	ACCOUNT NUMBER	TAX TYPE	APP SIGNED DATE	ISSUED DATE	ISSUED AMOUNT
[Icon]	[Redacted]	[Redacted]	[Redacted]	Roth IRA	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	IRA RMD	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Joint Tenants WROS	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Rollover IRA RMD	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Rollover IRA RMD	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Rollover IRA RMD	03/04/2025	—	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Individual	03/01/2025	03/03/2025	[Redacted]
[Icon]	[Redacted]	[Redacted]	[Redacted]	Trust	02/27/2025	03/03/2025	[Redacted]



FOR MORE INFORMATION

RIAs leverage LeadCenter's deeply integrated services and technologies to scale efficiently. As a seamless extension of your practice, LeadCenter.AI empowers advisors with the tools needed to grow and streamline operations.

To learn more about how LeadCenter.AI can support your wealth management firm's unique business needs, call (888) 291-7116 or email support@leadcenter.ai.

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