

Clients per Advisor

Benchmarks, Definition & Measurement Details

**SAMPLE
CONTENT & DATA**



Clients per Advisor

Definition & Measurement Details



What is Clients per Advisor?

The total number of wealth management clients managed by the company divided by the number of financial advisors working for the company at the same point in time.

Why should this KPI be measured?

Clients per Advisor measures the productivity of financial advisors with regards to the number of clients managed. A low value for this KPI may indicate that financial advisors do not have effective processes in place.

How is this KPI calculated?

Two values are used to calculate this KPI: (1) the total number of wealth management clients managed by the company, and (2) the number of financial advisors. Both values include both new and existing clients.

ABRIDGED CONTENT
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Clients per Advisor

Benchmarks & Characteristics of High Performers



Clients per Advisor

Total of Number of Wealth Management Clients / Number of Advisors



Characteristics of High Performers

- KPIs are well-defined, tracked and tied to performance reviews
- Robust self-service options for customer

Sample Size: XX

KPI Type: XX

Unit: XX

Is High or Low Best?: XX

How to read this chart: This chart summarizes the performance gaps between high (Top 5%), mid (Median) and low (Bottom 5%) performers for this Key Performance Indicator (KPI). For example, the column labeled "Top 5%" represents a company that outperformed 95% of the peer group observed for this metric.

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