

Revenue per Client (Annually)

Benchmarks, Definition & Measurement Details

**SAMPLE
CONTENT & DATA**



Revenue per Client (Annually)

Definition & Measurement Details



What is Revenue per Client (Annually)?

The total wealth management revenue earned by the company over the course of a year divided by the number of wealth management clients managed by the company over the same period of time.

Why should this KPI be measured?

Revenue per Client measures the average dollar amount of revenue generated by each wealth management client of the company. This KPI is a general measure of company profitability, as a relatively low

How is this KPI calculated?

Two values are used to calculate this KPI: (1) the total wealth management revenue earned by the company, and (2) the number of wealth management clients managed by the company. The formula for

ABRIDGED CONTENT
Purchase to View Full Definition & Measurement Details!

Revenue per Client (Annually)

Benchmarks & Characteristics of High Performers



Revenue per Client (Annually)

Total Wealth Management Revenue / Number of Wealth Management Clients



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.

Benchmarking Report Terms & Conditions

OpsDog KPI Reports



© 2017 OpsDog, Inc.

The OpsDog KPI Reports and their contents are protected by copyright laws, contain the trademark OpsDog, Inc., and are OpsDog's proprietary information. No part of this book shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopying, recording or otherwise, without written permission from OpsDog, Inc.

OpsDog, Inc. assumes no liability with respect to the use of the information contained herein which is provided "as is" and there are no warranties of any kind provided by OpsDog with respect to this report. OpsDog assumes no responsibility for errors or omissions and will not be liable for any damages resulting from the use of the information contained herein.

OpsDog, Inc.

1502 Augusta Dr., Suite 200

Houston, TX 77057

Tel: 844-650-2888