The Math Nobody Does

Every financial services leader I talk to knows their top performers outperform the rest. But almost none of them have quantified the gap. Here's why that matters: until you put a dollar figure on your execution gap, it stays in the category of "things we should probably work on someday." The moment you calculate it, it becomes an urgent business problem with a clear ROI case for solving it. This worksheet walks you through four calculations that most firms have never done. Each one uses data you already have — or can get in under an hour. The goal isn't precision. It's to move the conversation from "we think there's a gap" to "here's what the gap is costing us."

Calculation 1: The Performance Distribution Gap

Step 1: Map Your Revenue Distribution

Total team revenue (last 12 months):	$____________
Number of team members:	____________
Revenue from top 20% of performers:	$____________
Revenue from bottom 80% of performers:	$____________
Average revenue per top performer:	$____________
Average revenue per other performer:	$____________
Performance multiplier (top avg ÷ other avg):	____________x

If your multiplier is above 2x, you have a significant execution gap. Most wealth management teams we work with see 3–5x multipliers. The question isn't whether the gap exists — it's how much of it is closeable.

Calculation 2: The Conversion Gap

Step 2: Compare Conversion Rates

Total discovery meetings held (last quarter):	____________
Meetings that progressed to proposal:	____________
Proposals that closed:	____________
Discovery → Proposal rate:	____________%
Proposal → Close rate:	____________%
Top performer discovery → proposal rate (est.):	____________%
Top performer proposal → close rate (est.):	____________%

THE GAP:

If your team converted at top-performer rates: • Additional proposals per quarter: ____________ • Additional closes per quarter: ____________ • Average deal size: $____________ • Quarterly revenue left on the table: $____________

Calculation 3: The Ramp Time Gap

Step 3: Quantify New Hire Cost

Average months to full productivity for new hires:	____________
Target monthly revenue per rep at full productivity:	$____________
Average monthly revenue during ramp period:	$____________
Monthly revenue gap per new hire:	$____________
New hires per year:	____________
Total annual ramp cost:	$____________

Top-performing firms using AI-enabled practice environments reduce ramp time by 30–50%. What would that mean for your team? • If ramp time reduced by 40%: Months saved per hire: ____________ • Revenue recovered per hire: $____________ • Total annual ramp savings: $____________

Calculation 4: The Retention Revenue Gap

Step 4: The Cost of Client Attrition

Annual client attrition rate:	___________%
Total AUM / revenue base:	$___________
Revenue lost to attrition annually:	$___________
Percentage of attrition that's preventable (industry avg: 40–60%):	_____%
Preventable revenue loss:	$___________

Firms with consistent coaching and conversation quality see 15–25% lower attrition. If you reduced preventable attrition by half: • Annual revenue recovered: $___________

Your Total Execution Gap

	Annual Amount
Performance Distribution Gap	$___________
Conversion Gap (annualized)	$___________
Ramp Time Savings (annual)	$___________
Retention Recovery (annual)	$___________
TOTAL ANNUAL EXECUTION GAP	**$___________**

This number represents the revenue your organization could recover by closing the gap between your best performers and everyone else. **Even capturing 20–30% of this gap typically delivers 5–10x ROI on conversation intelligence investments.**

Ready to See Your Real Numbers?

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Book a free 30-minute diagnostic. We'll review your calculations, benchmark against similar firms, and show you exactly where the highest-impact opportunities are.

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