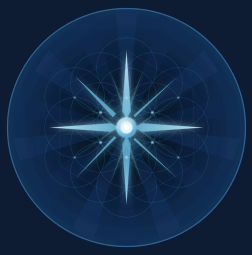
BLUEEYE CONSULTING · BLUEEYE ADVISORY



Capabilities Overview

Sales training, leadership coaching and AI practice for advisors, wholesalers and the leaders who coach them, from 10-person RIAs to top-10 wealth managers.

> **Every firm can name its top five producers. Almost none can say what those five do differently.**

FOR

Financial services firms

Wealth managers, asset managers, banks and RIAs

TWO BUSINESSES

BlueEye Consulting

BlueEye Advisory

FROM

Mike Levine, Founder

October 2026

WHO WE ARE

At a Glance

BlueEye finds what a firm's best advisors and managers do differently in their client conversations, writes it down as a standard, and gets the rest of the team practicing against it. Then we measure whether it holds in the numbers leadership already watches.

17 yrs
At ExxonMobil, Morgan Stanley and Merrill Lynch

3,000+
Advisors supported as a Merrill Director, with $500B+ in client assets

10,000+
People covered by learning and development Mike built at Bank of America

570
Scored practice conversations in one eight-week wealth management cohort

THE FOUNDER

Mike Levine

Mike spent seventeen years at ExxonMobil, Morgan Stanley and Merrill Lynch before going out on his own. At Merrill Lynch he moved from advisor to executive to learning and development. As Director and Market Development Manager he supported more than 3,000 advisors and served as Vice Chair of the FSA Advisory Council. He built learning and development for over 10,000 people at Bank of America.

He started at ExxonMobil, running a multi-state territory with full P&L and direct reports. During COVID he was running a Merrill program that moved cohorts of 50 to 100 advisors online, with too few leaders to give everyone feedback. Advisors were practicing on real clients. Conversational AI practice was the fix, and it became BlueEye Advisory.

He went independent in 2021 and now works part-time inside leadership teams at wirehouses and independent firms. BlueEye is deliberately lean, so clients work with Mike directly.

Licenses: FINRA Series 7, 9, 10 and 66.

FIRMS MIKE HAS BUILT FOR

- Morgan Stanley
- Wells Fargo
- Bank of America
- A large RIA within Osaic
- Wealthfront Advisors
- Independent RIAs

Remote-first, in person when it matters. Mike is based in Scottsdale, Arizona.

WHAT WE DO

Two Practices

BlueEye Consulting builds and runs the sales operating system. BlueEye Advisory adds the AI practice and performance data on top. Firms can start with either one, and most end up using both.

BLUEEYE CONSULTING

The operating system

Training, process and leadership capacity for advisor and sales teams.

BUILD 8 to 16 week projects

- Training curriculum for advisors, wholesalers, managers and growth teams
- SOPs and playbooks for prospecting, onboarding and service
- Salesforce workflows and hygiene, so the CRM reflects how the team actually sells
- New advisor onboarding programs with clear readiness milestones

RUN Fractional, on retainer

- Fractional sales, operations or L&D leadership
- One-on-one and group coaching for advisors, wholesalers and managers
- Owning the cadence and rollout so a program keeps running after launch

BLUEEYE ADVISORY

The AI practice layer

Scored practice and coaching data, built on the firm's own best people.

AMPLIFY AI-enabled performance

- Embed with leadership and turn goals and gaps into AI roleplay scenarios
- Firm-specific scorecards, agreed with leaders in the firm's language
- Certification programs and capstones that define "ready," not just "trained"
- COI playbooks and practice for CPA and estate attorney conversations
- Conversation analysis and coaching reads for every manager
- A Performance Intelligence Blueprint™ for each person
- Built to clear compliance and risk review before launch

Why one operator for both. Most readiness work stalls because the people who design the training and the people who run the technology never sit in the same room. At BlueEye they're the same person, which is how engagements move in weeks rather than quarters.

Scaled to the firm

10 to 50

People. Mike works directly with the founder or practice leader, often fractionally.

50 to 500

People. A standard, a practice library and managers who coach to it.

500+

People. Cohort by cohort, with leadership readouts and compliance built in.

HOW IT WORKS

The Method

Every engagement runs on the same two ideas. The Performance Intelligence Flywheel™ is how a standard gets built and spread. The Performance Intelligence Blueprint™ is how each person sees where to work next.

The Performance Intelligence Flywheel™

Five moves that build on each other. Each turn raises the floor and the ceiling across the team.

01
Surface
Capture what the top 15 percent do that no one has written down.

02
Teach
Turn it into scenarios anyone can run, scored and repeated.

03
Push
Move the middle 70 percent toward the top, with coaching that runs off the data.

04
Compound
New hires inherit the standard, so every cohort starts further ahead.

05
Signal
What the field hears feeds back into scenarios and scorecards.

The Performance Intelligence Blueprint™

Numbers tell you who's behind. They don't tell you why. Most firms coach from two sources that never meet: the KPI report, which arrives weeks late, and call reviews, which can't say whether any of it is moving the business.

The Blueprint reads the two side by side, one person at a time. Each person is compared only with peers in the same role. Where a lagging number and a recurring conversation gap line up, that's where coaching starts.

The output is one page: what they do well, where the gap is, and three ranked next steps a manager can use in the next one-on-one. A sample is available on request.

PERFORMANCE INTELLIGENCE BLUEPRINT™

Advisor A

Compared with peers in the same role

THEIR NUMBERS
The KPIs the firm already tracks: new assets, first meetings, conversion, retention. Each read against role peers.

WHAT THEY DO WELL
Behaviors their scored conversations show again and again, so they keep doing them on purpose.

WHERE THE GAP IS
The moments that keep breaking down, and how often, next to where the numbers trail.

THREE THINGS TO DO NEXT
Ranked. The first is the gap that shows up most.

Illustrative structure. Not a real person or firm.

WHERE FIRMS BRING ME IN

Where This Fits

Most firms already know coaching works. The limit is reach.

THE COMMON THREAD

A good coach or manager can work closely with a dozen or so people. BlueEye works one layer up, building the program once and giving every advisor a way to practice it, with data that shows each coach where to spend the next hour.

01 · REACH

One central program

Build one program centrally that every coach and manager runs, instead of each one building their own. Advisors practice between sessions, and scored data shows the coach where to spend the next hour.

02 · UPMARKET

Move advisors to larger households

Separate practice tracks for **$250K to $1M, $1M to $5M, $5M to $10M and $20M+**. Each is a different conversation, and advisors rarely get to rehearse the next tier before they're in it.

03 · REFERRALS

COI conversations

Playbooks, scorecards and practice for CPA and estate attorney relationships, so centers of influence become a repeatable source of introductions.

04 · RAMP

Onboarding and certification

A defined standard between "trained" and "ready" that doesn't need a leader in every session. New advisors practice, certify against a capstone and carry a coaching read into their first year.

05 · LEADERSHIP

Shape the AI mandate

Help define scope, success measures and the first 90 days for an AI-focused role. Or run that work fractionally while the right hire is found.

06 · CONSISTENCY

Coach the coaches

Practice for managers' and coaches' own hard conversations: the advisor with inertia, the one who's plateaued, the one who thinks they know better. Shared scorecards keep feedback consistent across offices.

Fits the existing stack. Practice and coaching data can sit alongside Salesforce, so managers see conversation quality next to pipeline. No new metrics system to stand up.

Every engagement starts with a short working session with leadership to pick the first one.

PROOF AND NEXT STEPS

Results and How We Work

Top-10 wealth management firm

EIGHT WEEKS · TWELVE PARTICIPANTS

100%
Completion. All twelve finished every wave, including the hardest scenarios in the final week.

570
Scored practice conversations, each graded on a firm-specific rubric.

63%
Fewer reps needed to clear the bar in the wave that introduced a new conversation type.

Depth beat activity: the three lowest-volume participants outscored the three highest-volume on the hardest material. The full anonymized case study is at blueeyeadvisory.com/case-study.

Ways to work together

MOST FLEXIBLE

Fractional

10 to 15 hours a week, roughly 40 hours a month. Remote-first, embedded with leadership as a standing part of the team.

WHERE MOST START

90-day program

Days 1 to 30 surface the standard. Days 31 to 60 teach and push it. Days 61 to 90 measure what moved and map the next step.

DEFINED SCOPE

Project build

8 to 16 weeks for a curriculum, onboarding program, certification or Salesforce process, handed to your team to run.

Data, IP and compliance

Confidential by default. Every engagement runs under NDA. Each firm's scenarios, scorecards and conversation data stay separate, and client data isn't used to train a broader AI model.

Built for review. Legal, risk and compliance get the engagement structure, data scope and AI data flow up front, so the review starts with answers. A briefing for those teams is available before an NDA.

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