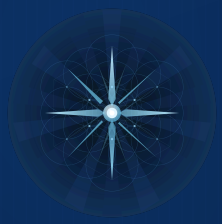

REVENUE IMPACT CALCULATOR

The Math Nobody Does.

Four calculations most firms have never run. Use the data you already have to put a dollar figure on your execution gap.

DESIGNED FOR	**Wealth Management, Asset Management, Insurance** Sales, Distribution, and Enablement Leaders
AUTHORED BY	Mike Levine, Founder, BlueEye Advisory
FORMAT	Worksheet, 7 pages
TIME REQUIRED	Under 30 minutes

blueeyeadvisory.com

AI-powered conversation intelligence for financial services

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01 INTRODUCTION

The math nobody does.

Every financial services leader knows their top performers outperform the rest. Almost none of them have put a dollar figure on the gap.

Here is why that matters: until you quantify 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 most firms have never done. Each one uses data you already have, or can get in under an hour. The goal is not precision. It is to move the conversation from **"we think there's a gap"** to **"here is what the gap is costing us."**

02 THE FOUR GAPS

1

Performance Distribution Gap

How wide is the spread between your top performers and everyone else.

2

Conversion Gap

Revenue left on the table when middle performers convert like top performers.

3

Ramp Time Gap

The cost of new hires getting to full productivity more slowly than they could.

4

Retention Revenue Gap

Revenue lost to preventable client attrition that better conversations would have saved.

BLUEEYE PERSPECTIVE

"Even capturing 20 to 30 percent of the total gap typically delivers 5 to 10x ROI on conversation intelligence investments. The number is almost never smaller than leaders expect."

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01 Performance Distribution Gap

Map your revenue distribution over the last twelve months. Quantify how wide the spread is between top performers and everyone else.

STEP 1 MAP YOUR 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

READ THE NUMBER

If your multiplier is **above 2x**, you have a significant execution gap. Most wealth management teams we work with see **3 to 5x multipliers**. The question is not whether the gap exists. It is how much of it is closeable.

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02 Conversion Gap

Compare the conversion rates of your average performers to your top performers. Estimate what the team would look like if everyone converted at the top rate.

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	**$ _____**

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03 Ramp Time Gap

Every month a new hire takes to reach full productivity is revenue the firm never recovers. Quantify what ramp time is actually costing you.

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	$

SCENARIO IF RAMP TIME REDUCED BY 40%

Top-performing firms using AI-enabled practice environments reduce ramp time by **30 to 50 percent**. Run the scenario.

Months saved per hire	_____
Revenue recovered per hire	$ _____
Total annual ramp savings	$ _____

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04 Retention Revenue Gap

Not all attrition is the same. Some is unavoidable. The rest is a direct reflection of conversation quality, and it is the most recoverable revenue in the stack.

STEP 4 THE COST OF CLIENT ATTRITION

Annual client attrition rate	%
Total AUM or revenue base	$
Revenue lost to attrition annually	$
Percentage of attrition that is preventable (industry average: 40 to 60 percent)	%
Preventable revenue loss	$

SCENARIO IF PREVENTABLE ATTRITION REDUCED BY HALF

Firms with consistent coaching and conversation quality see **15 to 25 percent lower attrition**. Assume you cut your preventable attrition in half.

Annual revenue recovered $ _____

FIELD OBSERVATION

"Retention is the quietest number on the scorecard and the loudest signal about conversation quality. Clients leave long before they churn - if you can hear it."

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05 TOTAL EXECUTION GAP

Your annual execution gap.

Sum the four calculations. This is the revenue your organization could recover by closing the distance between your best performers and everyone else.

GAP	ANNUAL AMOUNT
Performance Distribution Gap	$ _____
Conversion Gap (annualized)	$ _____
Ramp Time Savings (annual)	$ _____
Retention Recovery (annual)	$ _____
Total Annual Execution Gap	**$ _____**

READY TO SEE YOUR REAL NUMBERS?

Fifteen minutes. Your numbers. One next move.

Book a focused review with Mike. We will pressure-test your calculations, benchmark against similar firms, and show you exactly which part of the gap is most recoverable first.

Book the 15-minute review blueeyeadvisory.com

Mike Levine
Founder, BlueEye Advisory
mike@blueeyeadvisory.com · blueeyeadvisory.com · Book a call

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