

Turn Advisor Data into Measurable Growth

Performance intelligence that drives productivity, retention, and revenue

Advisor performance data is fragmented across CRM, portfolio, compliance, and support systems, making management reactive. Leaders lack a unified view of advisor health, coaching varies by region, and top producers disengage before intervention is possible.

What's holding you back

- Advisor data scattered across disconnected systems
- Metric definitions vary, eroding dashboard trust
- React after disengagement instead of intervening early
- Coaching inconsistent without shared signals
- Platform investments don't translate to growth

What success looks like

- › Quickly identify underperforming or at-risk advisors
- › Consistent, data-driven coaching across regions
- › Revenue and AUM per advisor increase measurably
- › Advisor retention improves
- › Platform adoption rises

How evolV helps



Builds **unified advisor intelligence** with standardized identity across CRM, custodians, and portfolios



Delivers **explainable analytics** embedded in workflows—no black-box scoring



Establishes **governed metrics** business, field leadership, and IT trust

Why evolV?

- **Deep** wealth management data integration expertise
- **Transparent** advisor analytics field leaders trust and act on
- **Strong** governance ensuring metric consistency across systems
- **Proven** frameworks turning data into retention and growth outcomes