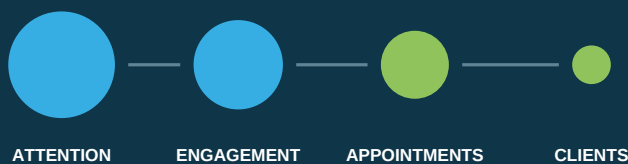


Advisor Funnel Performance Report

Sample Practice | 2026 Year-to-Date

Simple inputs. Executive-level clarity.

A coaching-led view of marketing performance, conversion, revenue, ROI, trends, and the next best decision.



What the funnel is telling you.

This sample report turns straightforward campaign and appointment inputs into a complete operating view of marketing performance. It is designed to show where growth is working, where prospects are stalling, and which decisions deserve attention next.

MARKETING SPEND

\$27,000

ESTIMATED REVENUE

\$219,850

MARKETING ROI

714%

ATTENDEES / LEADS

29

FIRST APPOINTMENTS
KEPT

14

CLOSED-WON CASES

8

Performance snapshot

Campaign	Source	Spend	Closed	Estimated Revenue
Fake Steakhouse	Seminar	\$10,000	3	\$53,350
January Radio Show	Radio	\$12,000	4	\$135,700
New Year Kickoff	Existing Clients	\$5,000	1	\$30,800

The goal is not more reporting for reporting's sake. The goal is a short, repeatable review that turns marketing activity into coaching priorities, team accountability, and measurable next actions.

Where marketing produces economic value.

FIA PREMIUM CLOSED

\$2.7M

AUM CLOSED

\$2.8M

REVENUE OVER SPEND

8.1x

Estimated revenue by lead source

Radio  **\$136K**

Seminar  **\$53K**

Existing Clients  **\$31K**

Lead source	Spend	Closed	Revenue	ROI
Radio	\$12,000	4	\$135,700	1031%
Seminar	\$10,000	3	\$53,350	434%
Existing Clients	\$5,000	1	\$30,800	516%

See exactly where momentum is gained or lost.

RSVPs / inquiries

37

Attendees / leads

29

First appointments set

18

First appointments kept

14

Second appointments kept

9

Third appointments kept

8

Closed-won cases

8

Stage	Count	Conversion from prior stage
RSVPs / inquiries	37	-
Attendees / leads	29	78%
First appointments set	18	62%
First appointments kept	14	78%
Second appointments kept	9	64%
Third appointments kept	8	89%
Closed-won cases	8	100%

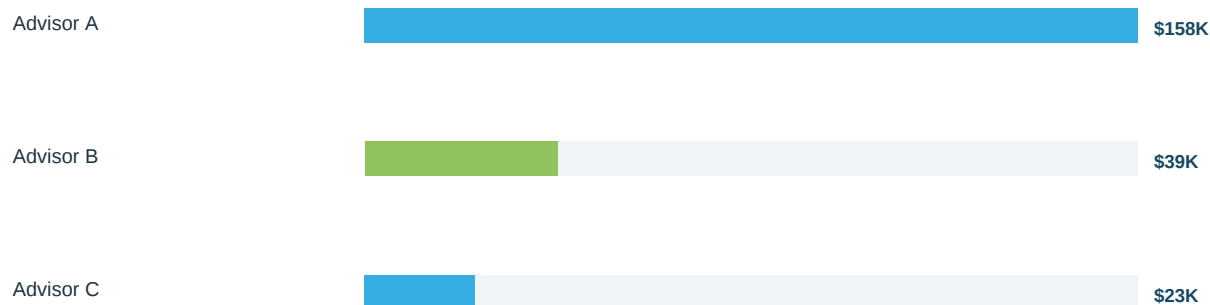
Conversion percentages create a coaching agenda. Rather than relying on anecdotal impressions, the practice can focus on the specific handoff, follow-up, appointment, or closing stage where the greatest opportunity exists.

Turn practice-wide results into focused coaching.

Advisor-level visibility helps leaders recognize strengths, identify coaching opportunities, and align team effort around the stages that matter most.

Advisor	1st Kept	2nd Kept	Closed	FIA	AUM	Revenue
Advisor A	5	5	5	\$2.0M	\$1.8M	\$158,000
Advisor B	6	3	2	\$445K	\$820K	\$39,350
Advisor C	3	1	1	\$300K	\$150K	\$22,500

Estimated revenue by advisor



The report is designed to support productive conversations, not create a scoreboard. Results become most useful when paired with context, clear expectations, and the right next action.

Move from hindsight to the next best decision.

MEASURED
CAMPAIGNS

3

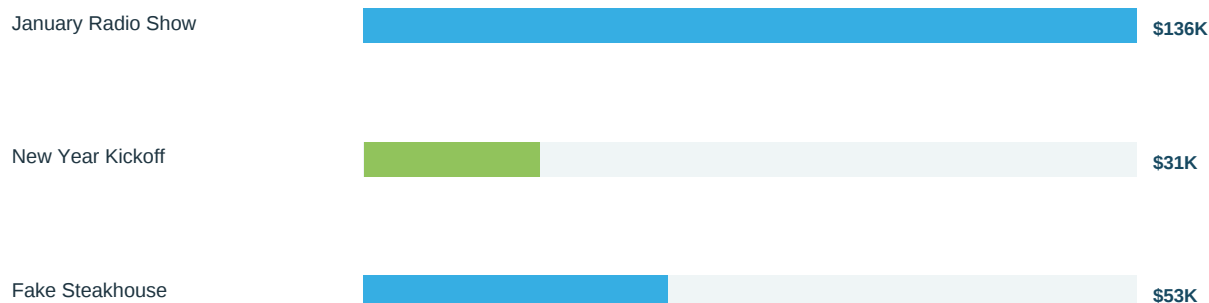
AVERAGE REVENUE /
CLOSE

\$27,481

ILLUSTRATIVE ANNUAL
RUN RATE

\$879K

Campaign revenue comparison



Observations to discuss

- Radio currently produces the strongest estimated revenue contribution in the sample data.
- The measured lead/attendee-to-closed conversion is 28%.
- First-appointment follow-through is the most important operational checkpoint to review consistently.
- Monthly review makes it easier to compare marketing spend, advisor follow-up, and closed revenue before small issues become expensive.

Next conversation: Which stage, campaign, or team behavior would create the greatest improvement over the next 90 days?