

EnterprisePortal

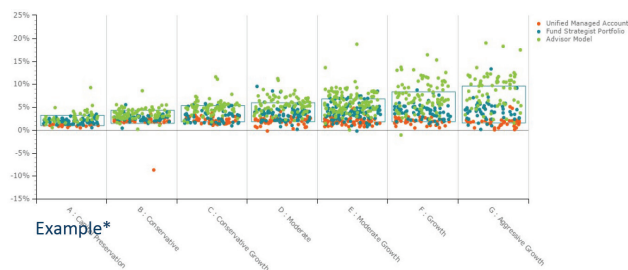
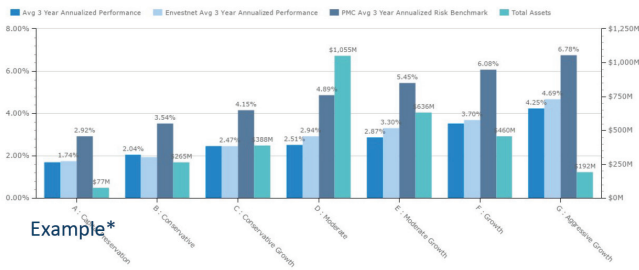
Performance Dashboards

Using our team of data engineers, scientists, and analysts, we work with the vast amount of data in the Envestnet platform to provide our partners with robust analytics. We do all the heavy lifting to turn production data into an analytical database which you can then access through our cutting-edge dashboard system, Envestnet Analytics. Industry veterans and vast business knowledge has allowed us to design impactful, out-of-the-box insights. Our goal is to help you grow your assets, make great business decisions, and manage your partners like never before.

Our Performance Dashboards provide an intuitive way to measure your advisor's account level performance. You'll be able to quickly find the accounts that are performing at an acceptable level, and, more importantly, the accounts that aren't working.

We make it possible to see performance at the enterprise, firm, advisor, and down to the individual account level.

In addition to understanding performance at all levels of your firm, we provide benchmarks compared to several different peer groups.



What Can You Do?

- Directly compare the performance of different programs and strategies
- Better manage and coach your advisors
- Understand your performance compared to peers

Key Users

- Senior Executives
- Product Managers
- Compliance
- Sales

Further Information

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*For illustrative purposes. Does not represent actual performance data.

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