



Convergence Adviser Revenue Roadmaps

Revenue-based opportunity prioritization for service providers

July 2026

Product Description

- Adviser Revenue Roadmaps identifies and prioritizes the advisers and private funds most likely to create future revenue opportunities for a service provider. The product combines Convergence predictive signals, adviser and fund profiles, strategy exposure, service-provider relationships, growth indicators, and estimated revenue potential into a client-specific action plan showing where revenue may come from, which relationships deserve attention, and how to focus sales, coverage, and retention resources.

Product Benefits

- **Quantifies the Addressable Opportunity:** Convergence estimates approximately \$6.4 billion in addressable private fund administration revenue from 2026 through 2030 across new fund launches, outsourcing, service-provider switches and diversification, and lift-outs.
- **Focuses Resources on the Highest-Value Opportunities:** identifies advisers most likely to put revenue into play over the next five years and ranks the opportunity by prospect, client, decision type, and estimated revenue potential.
- **Supports Growth and Retention:** helps sales and client management teams allocate coverage, defend existing relationships, pursue new prospects, and organize outreach around a revenue-based action plan.

Product Features

- **Integrated Predictive Models:** identifies managers likely to launch a fund, outsource an existing fund, switch or diversify service providers, or consider a middle- and back-office lift-out.
- **Revenue Estimates, Priority Scores, and Relationship Tags:** ranks opportunities using projected revenue, client-specific target criteria, existing-client status, market share, and wallet opportunity.
- **Supporting Narrative and Forecast Context:** provides signal rationale and Knowledge Center research for campaign planning and meeting preparation. Convergence's prior three-year private fund and AUM forecasts have been within a 10% margin of error since inception and within a 30% margin of error at the fund-type level.

Primary Use Cases and Delivery

- **Primary Users:** service-provider sales, business development, client management, retention, strategy, coverage, and executive leadership teams.
- **Common Use Cases:** multi-year prospect prioritization, wallet expansion, client defense, campaign planning, meeting preparation, and sales and coverage resource allocation.
- **Delivery and Pricing:** a customized roadmap combining predictive models, revenue estimates, relationship tags, priority scores, and supporting narratives. Pricing is \$400 per prospect with a \$50,000 minimum commitment, equivalent to 125 reports; volume pricing scales to \$300, \$200, or \$100 per prospect. Annual monitoring is available for \$50 per roadmap update, with a two-year initial term.

To Learn More About Revenue Roadmaps Contact:

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