



Convergence Client Quality Benchmarking (CQB)

Client portfolio quality, growth, and risk benchmarking

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Product Description

- Client Quality Benchmarking enables firms to evaluate, benchmark, and monitor the quality of their client base relative to peers. CQB provides objective views across client market stature, future revenue value, strategy alignment, and operational or commercial risk, helping leadership understand the strength and sustainability of client relationships.

Product Benefits

- **Improves Client Acquisition Strategy:** shows whether the firm is winning higher-quality clients relative to competitors and where the client mix can improve.
- **Sharpens Revenue Prioritization:** highlights clients and segments with stronger forward-looking growth potential and revenue durability.
- **Surfaces Portfolio Risk:** identifies operational, regulatory, and commercial conditions that may weaken client quality or relationship sustainability.

Product Features

- **League Table Benchmarking:** ranks client market stature using relative industry position, market leadership, and competitive strength.
- **Future Revenue and Strategy Alignment:** compares growth trajectories and aligns investment strategy growth with the products and services used by the client base.
- **Operational and Commercial Risk Benchmarking:** evaluates complexity, compliance exposure, and sustainability risks across the client portfolio.

Primary Use Cases and Delivery

- **Primary Users:** executive leadership, business development, sales, client relationship management, risk, and compliance teams.
- **Common Use Cases:** client portfolio reviews, account prioritization, competitive positioning, relationship strategy, and board or executive reporting.
- **Delivery:** online analytics and comparative reporting configured to the client portfolio and relevant peer groups.