



SKYBOUND

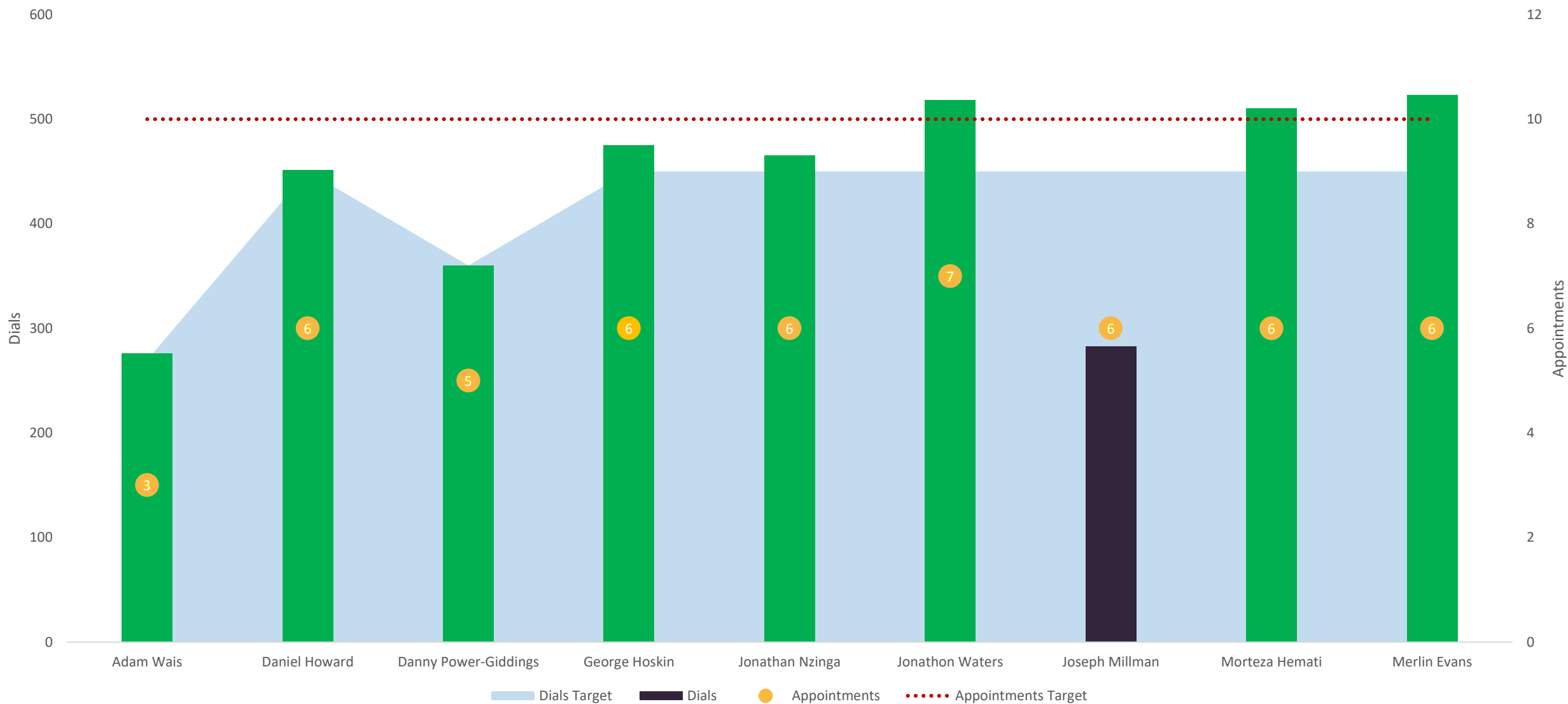
WEALTH MANAGEMENT

BDM MANAGER STATS

*LONDON*

# Weekly Targets

The following graph explains the performance of the BDMs against their dials and appointments targets. The coordinators crossing any target have been marked in green.





# Weekly Targets

**KEY:**  
**D** - Dials  
**B** - Business  
**A** - Appointments

The **Target Achieved** is the percentage of working BDMs that have hit at least one of their 3 targets for the week.

| London BDMs     | Week 36    | Week 37    | Week 38     | Week 39    |
|-----------------|------------|------------|-------------|------------|
| Adam Wais       | A          | D          | AB          | D          |
| Daniel Howard   |            | D          | D           | DB         |
| Danny Giddings  | A          | D          | D           | D          |
| George Hoskin   | D          | A          | D           | D          |
| Joseph Millman  | AB         |            | A           |            |
| Jonathon Waters | D          | D          |             | D          |
| Jonathan Nzinga | D          | DB         | D           | D          |
| Morteza Hemati  |            |            |             | D          |
| Merlin Evans    | DA         | DA         | D           | D          |
| <b>Total</b>    | <b>88%</b> | <b>88%</b> | <b>100%</b> | <b>89%</b> |

## SHOUTED

| Coordinator    | Shouted £ | Expected Issued Date | Business Split | Lead Source | Consultant     |
|----------------|-----------|----------------------|----------------|-------------|----------------|
| Daniel Howard  | £ 6,588   | 28-Oct               | Regular        | Datacentre  | David Henson   |
| Joseph Millman | £ 22      | 30-Sep               | Lump Sum       | Datacentre  | Joel Colman    |
| Merlin Evans   | £ 10,947  | 30-Dec               | Lump Sum       | Datacentre  | Paul Butler    |
| Morteza Hemati | £ 1,166   | 14-Oct               | Lump Sum       | Coordinator | Richard Cawley |

## ISSUED

| Coordinators   | Issued £ | Business Split | Client                  | Consultant  |
|----------------|----------|----------------|-------------------------|-------------|
| Joseph Millman | £ 997    | Regular        | Alexandros Kontogeorgos | Joel Colman |
| Joseph Millman | £ 22     | Lump Sum       | Olivier Carlens         | Joel Colman |



# PIPEDRIVE KPIs

Sat Rates are a ratio of First Sat to First Scheduled.  
The coordinators marked in green have completed their Pipedrive KPIs.  
Meetings Sat Target is set at 6 Meetings

| Coordinator          | First Scheduled | First Sat | Sat Rate   | Swerved   |
|----------------------|-----------------|-----------|------------|-----------|
| Adam Wais            | 5               | 3         | 60%        | 0         |
| Daniel Howard        | 5               | 2         | 40%        | 2         |
| Danny Power-Giddings | 3               | 1         | 33%        | 2         |
| George Hoskin        | 3               | 0         | 0%         | 3         |
| Jonathan Nzinga      | 7               | 1         | 14%        | 6         |
| Joseph Millman       | 2               | 1         | 50%        | 1         |
| Jonathon Waters      | 2               | 0         | 0%         | 0         |
| Merlin Evans         | 9               | 5         | 56%        | 3         |
| Morteza Hemati       | 5               | 3         | 60%        | 2         |
| <b>Total</b>         | <b>41</b>       | <b>16</b> | <b>39%</b> | <b>19</b> |

| To be updated |
|---------------|
| 2             |
| 1             |
| 0             |
| 0             |
| 0             |
| 0             |
| 2             |
| 1             |
| 0             |
| <b>6</b>      |



# CREATED LEADS

Created Leads Target is set at 25 leads per BDM per week.

| Coordinator          | Week 36 | Week 37 | Week 38 | Week 39 | Average | Total |
|----------------------|---------|---------|---------|---------|---------|-------|
| Adam Wais            | 20      | 0       | 0       | 0       | 5       | 20    |
| Daniel Howard        | 2       | 19      | 6       | 7       | 9       | 34    |
| Danny Power-Giddings | 16      | 0       | 32      | 0       | 12      | 48    |
| George Hoskin        | 9       | 6       | 18      | 10      | 11      | 43    |
| Jonathan Nzinga      | 13      | 32      | 45      | 38      | 32      | 128   |
| Jonathon Waters      | 64      | 0       |         | 1       | 22      | 65    |
| Joseph Millman       | 3       |         |         | 1       | 2       | 4     |
| Morteza Hemati       |         | 0       | 0       | 0       | 0       | 0     |
| Merlin Evans         | 12      | 12      | 11      | 20      | 14      | 55    |
| London               | 139     | 69      | 112     | 77      | 99      | 397   |

# LEADS AVAILABLE

