

Return on Investment



Both **Portfolio Connection™** and **Customer Connection™** - powered by iLumen, are affordable

systems that do not require a major financial commitment from the firm and can easily be delivered regardless of the timing of the firm's budget cycle. The system requires no new hardware and does not impact the firm's existing systems.

Opportunities among business clients that go unidentified represent unrecognized service revenue. The example provided shows how Portfolio Connection can generate a significant return on investment just by identifying service opportunities in 10% of the portfolio companies.

This example assumes 400 business clients and that 10% of the portfolio has unidentified service opportunities. Closing those opportunities with an average revenue value of \$10,000 each generates \$400,000 in new service revenue.

Using this example, Portfolio Connection not only pays for itself, but also generates a significant return on investment. Other ROI calculations can measure the financial impact of increased efficiency within the firm as partners have a more expedited way to gain insight into the right clients to engage with.

Element	Description
Average size of single office	\$5-\$25 million
# of Business Customers	400 in Portfolio
Unidentified Service Opportunities	40 (10% of portfolio companies)
Average revenue per new opportunity	\$10,000
Value of new opportunities	\$400,000
Estimated Cost of Portfolio Connection	\$25,000
Return on Investment	\$375,000

- *The system pays for itself through increased revenue from newly identified service opportunities.*
- *Easily fits in between budget cycles.*
- *Increased efficiencies, saving time and money.*

