

7 CRM Metrics Every Asset Management Firm Should Be Tracking

Your CRM is only as valuable as the insights you pull from it. Too many firms treat it as a contact database, missing the opportunity to use it as a strategic engine for growth. Here are the eight metrics that turn your CRM into a roadmap for better decisions. Here are 7 CRM metrics everyone should be tracking.



1 Win Rate by Prospect Type and Channel

Break your win rate down by prospect type (institutional, RIA, family office), channel (consultant-driven, direct, referral), and strategy. If your win rate is higher with endowments than public pensions, that's a signal about where to focus.

2 Client Retention Rate and At-Risk AUM

Keeping clients is far less expensive than winning new ones. Use your CRM to flag at-risk relationships early, declining meeting frequency, unanswered communications, key contact departures, or performance below agreed benchmarks.

3 Contact Engagement and Touchpoint Frequency

Are your highest-value clients getting the right level of attention? Surface contacts who haven't been touched in 30, 60, or 90 days. Set engagement benchmarks by client tier so no relationship slips through the cracks.

4 RFP and DDQ Response Metrics

Track volume, turnaround time, and win/loss rate by request type. Identify which consultants are driving the most opportunities and where bottlenecks in your response process are costing you mandates.

5 AUM by Relationship Source

Map AUM back to its origin, consultant, referral partner, conference, or direct outreach. Over time, this reveals which channels generate the most durable AUM and where resources are best invested.

6 Task Completion and CRM Adoption Rates

Even the best metrics are meaningless if your team isn't logging activity consistently. Monitor the percentage of client interactions captured, open and overdue tasks by team members, and data completeness across contact records.

7 Net Promoter and Satisfaction Signals

Log qualitative signals from client conversations, review meetings, and feedback touchpoints. Firms that systematically capture client sentiment are better positioned to identify opportunities, secure referrals, and defend against competitive threats.

Data without action is just noise. The firms that grow consistently are the ones that build structured processes around these metrics, regular pipeline reviews, relationship health check-ins, and business development retrospectives grounded in CRM data. SatuitCRM is purpose-built to give asset management teams exactly that visibility.