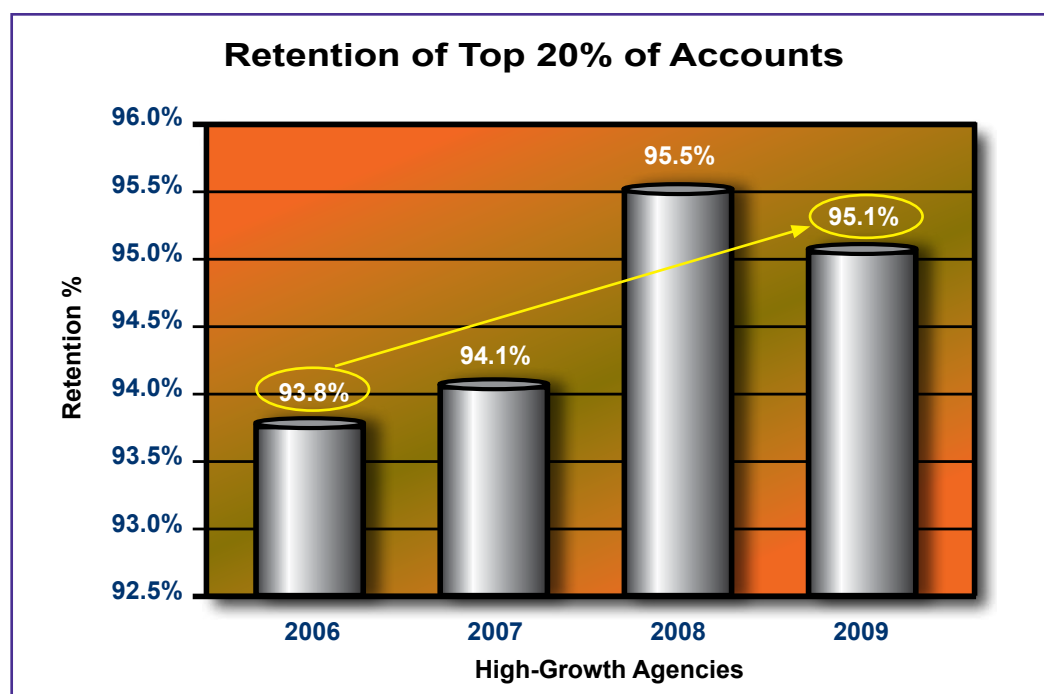


Account Retention Analysis

Account retention serves as the foundation for revenue growth. And when we analyze account retention, The Pareto Principle rules. The top 20% of your organization's accounts most typically represent 80% of the firm's revenues. The same percentages apply to departmental and individual producer books as well. Thus, your core institutional account retention focus should reside on the Top 20% of your accounts. The best agents and brokers retain approximately 95.1% of their top accounts on an annual basis.



Such an analysis does not diminish the importance of overall agency retention rates, but instead acknowledges that some small accounts will naturally turn over and the subsequent impact on agency revenue and profitability is negligible. Many firms love small business as the collective value is often most profitable from a percentage perspective. However, in terms of sheer dollars and in light of increasing competition for accounts, you must design and proactively plan to solidify the revenue base associated with your largest 20% of accounts. Your top clients are your competitors' top prospects. You cannot afford to lose these accounts by taking your relationships for granted.

Authored by Patrick T. Linnert, Executive Vice President, 440-392-6568



The MarshBerry Sales Portal



MarshBerry, the nation's leading management consulting firm, owns and operates a world class, innovative, web-based tool that automates all three aspects of sales management. The aggregate revenue of the current users on the system totals over \$950 million in commission income (over \$7.6 billion in premium). References from power users ranging in commission revenue from \$300,000 to \$50 million are available upon request.



Lead Management

- Account Importing Capability
- Searchable Data Fields
- Campaign Management
- Pre-Appointment Activity Tracking
- Outlook Integration

Pipeline Activity

- Appointment Tracking
- Carrier Interaction Tracking
- Referral Tracking
- Commission Sharing
- Easy to Run Reporting

Stewardship

- Customized, Branded Stewardship Documents
- Activity Tracking & Reminders
- Service Compliance Scoring & Accountability

**View a live 50-minute web demonstration
of the MarshBerry Sales Portal:**

Monday, September 20, 2010, 4:00PM EST
Tuesday, September 21, 2010, 1:00PM EST
Wednesday, September 22, 2010, 3:30PM EST

Web Instructions

Go to <http://www.MarshBerry.com/SalesPortalDemo>

Audio Instructions

Dial In: 1-888-850-4523 / Password: 812834

**If these dates
do not work for you,
please contact
Tommy McDonald
to schedule a
free one-on-one
demonstration.**

**440-392-6700 or
TomM@MarshBerry.com**



MARSHBERRY
Sales Portal