

Peak Season Success

Tactics and Ideas

Know Your Numbers

Run Reports
for your Entire
Team and Firm

Create Heat
Maps

Identify and
Understand the
Different Peaks

Analyze Your Data

Total
Revenue Per
Month

Number of
Accounts Per
Month

Out of Office
Time Spent
on These
Accounts

Complexity
of Accounts
- Speed and
Decisiveness

Planning in Advance

Open Resources
Available - Team
and Firm

PTO, Holidays,
Time Spent Out
of the Office

Pre-Peak Season
Meetings with
Underwriters and
Markets