PATRA™ & CAA
Combined Agents of America

Retain & Grow
Your Small Books of Business

A Dedicated Small Accounts Management Team

Our small accounts management solution, Patra Select, equips you with dedicated, benefits and/or P&C licensed account managers to manage and grow your books of small business. Patra Select provides A-Z account management servicing all under your brand management systems. Our small accounts management solution provides a variety of options to address employee benefits, commercial lines, and personal lines.

With Patra Select, your team can spend more time focusing on key accounts and agency relationships without sacrificing the service levels your customers expect.

Boost Profitability & Improve Client Retention

Guaranteed Return

Generate a guaranteed return on commission. That means increased margins on your books of small business.

The Patra model generates increased insured retention rates and enables more relationship development while significantly increasing client satisfaction.

Grow Accounts

Extend your ability to maintain strong carrier relationships and address growing small books of business without hampering the ability to service key agency accounts.

Patra seamlessly integrates with your existing tools to ensure real-time, comprehensive quotes of standard and non-standard business.

Integrated Support

Invisible to your insureds, our small accounts management team integrates to your agency systems to work through your company's branded telephone greetings and email domains.

Patra also assigns secondary and tertiary staff support to cover emergencies, vacations and other PTO, ensuring no disruption to your customers.

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Small Book Management...
The most frequently asked questions:

Will I retain control of my small accounts?
Yes. Your accounts will always be your accounts. Patra team members will work within your existing agency management system to service your accounts. And don't worry, transferring accounts back to the agency is as easy as recoding in your agency management system.

What defines a small account?
Patra understands that every agency uniquely defines their small accounts. For some it means under $100 managed revenue per account, for others it means under $500, or for others it means under $10,000. We find it most common that agencies define their small accounts as under $2,500 managed revenue, but we can work with whatever you call small.

What services are included in the Patra Select EB model?
Your Patra team will manage every aspect of your book, from answering calls and managing eligibility changes to marketing new business and rounding accounts.

What happens in the event a Patra Select Account Manager is out of the office?
As a Patra Select customer you are assigned a full time, dedicated account manager, with years of agency experience, to lead your team. To ensure no gaps in coverage should your account manager be out of the office, we also train and coordinate second and tertiary staff support to cover all service needs during an absence.

CAA AGENCIES COMMITED TO GROWING THEIR BUSINESS CHOOSE PATRA AS THEIR TRUSTED PARTNER

For More Information Contact:

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