



PATRA™ &

 **THE COUNCIL**
The Council of Insurance Agents & Brokers

PATRA ASSIST

Virtual Assistance

Patra Virtual Assistants allow you to focus on growing your business without the burden of administrative or HR costs associated with hiring full-time staff.

AN INTRODUCTION TO



Virtual Assistance

for  THE COUNCIL
The Council of Insurance Agents & Brokers

PATRA'S PHILOSOPHY

With our highly skilled team of virtual assistants, you immediately lower the burden of overhead costs without sacrificing customer service and support.

With Patra's Virtual Assistants, you can focus on growing your business without the burden of administrative or HR costs associated with hiring full-time staff. Our dedicated team members seamlessly integrate into your environment, operating as an extension of your team and aligning with your customer values, hours, management systems, communication platforms, and workflows.

Located in the largest city in Metro Manila, our regional office in the Philippines is a collaborative, fun, and exciting work environment! Patra promotes work-life balance, celebrates culture, values integrity, and creates pathways for employee success and growth.

HOW PATRA VAs SUPPORT AGENCIES

Patra's Virtual Assistants execute a wide-range of comprehensive tasks to help your team achieve your business and operational efficiencies.



NEW BUSINESS

- Preparing Submissions & ACORDs
- Generating Proposals
- Quoting in Carrier Portal or Rater

SALES & MARKETING

- Prospecting Emails & Cold Calling
- Appointment Setting for Producers
- Qualify & Handoff Inbound Leads
- Social Media Content Management

COMPLIANCE & CLAIMS

- Claims Tracking & Follow Up
- Loss Summary & Form Downloads
- Open Enrollment Communications

POLICY SERVICING

- AMS Updates & Data Entry
- Renewal Marketing Support
- Policy Service Requests
- Eligibility Enrollments, Terms, & Changes

FINANCE & ACCOUNTING

- Invoicing & Collecting Payments
- Commission Entry & Tracking
- Direct Bill Posting
- Spreadsheets

ADMINISTRATIVE SUPPORT

- AMS Updates & Data Entry
- Renewal Marketing Support
- Policy Update / Change Requests

THE PATRA ENGAGEMENT PROCESS



WHAT SETS PATRA'S VAs APART?

Patra sets the industry standard for virtual assistance as our VAs complete extensive insurance-industry training and testing to gain their **Patra Virtual Assistant Certification™** from **Patra University**.

The comprehensive curriculum includes:

- ✓ Introduction to Patra
- ✓ Insurance BPO Industry
- ✓ Remote Work Cultures
- ✓ Importance of Virtual Assistants
- ✓ Introduction to US Business Best Practices & Etiquette
- ✓ Understanding Client Expectations & Deliverables
- ✓ Time Management & Scheduling
- ✓ MS Office Fundamentals
- ✓ Zoom Hosting & Virtual Meetings
- ✓ Utilizing Insurance CRM & AMS Systems



- ✓ Insurance Principles and Terminology
- ✓ Types of Insurance & Services
- ✓ Policies & Coverage
- ✓ Agency Operations

- ✓ Effective Communication Strategies
- ✓ Proper Communication Across Email & Telephone
- ✓ Conflict Resolution & Problem-Solving Techniques

PATRA'S ASSURANCES FOR DATA PROTECTION & SECURITY



Patra's SOC2 Compliance ensures the safety and privacy of your data



Patra VAs connect to your environments through VPN featuring AES256 encryption



Functionality Limited to Patra Environment Only



No Administrator Rights; USB Storage and Print Disabled



Single Sign-On, Data Loss Prevention, and SIEM Systems Utilized



Hard Drive Storage Security Featuring AES256 Encryption



Patra's multiple processing centers based in geopolitically stable countries, allow for load balancing and operational continuity under adverse conditions



Patra's comprehensive and audited Business Continuity & Recover Plans reduce your exposure to unknown threats and vulnerabilities

HOW ARE OTHERS USING VAs AND WHAT THEY ARE SAYING...



Integrating a Patra virtual assistant into our team has allowed our agents and CSRs to focus more on building relationships with clients while the assistant efficiently manages routine tasks.

- Current Patra VA Customer

PATRA ASSIST CLIENT SUCCESS STORIES

RETAIL
\$7.5M Annual Revenue
30 Employees

RETAIL
\$291M Annual Revenue
300 Offices in US

RETAIL
\$215M Annual Revenue

CLIENT PROFILE	Commercial, Employee Benefits, and Personal	Personal & Business Coverage	Business, Personal, and Employee Benefits
CHALLENGES	Backlog of non-licensed processing tasks such as renewal comparisons	Decentralized and non-standardized Direct Bill Posting processes across 300 offices	Internal promotions caused backlog of entry-level tasks.
AGENCY OUTCOMES	<ul style="list-style-type: none"> Backlog elimination Process standardization 	<ul style="list-style-type: none"> Process standardization & centralization Improved capacity to scale 	<ul style="list-style-type: none"> Decrease in employee churn Improved margins
RESULTS	<ul style="list-style-type: none"> 50% cost savings v internal FTE 2 VAs processing the work of 3 internal FTEs Patra ramp time 1 week v agency 90-day timeline 	<ul style="list-style-type: none"> Developed scalable, efficient and standardized process Process performed by 3 Patra VAs v 20+ internal FTEs 	<ul style="list-style-type: none"> 22-33% reduction in hourly costs to process tasks Patra ramp time 2 weeks v 3-4 months to recruit, hire and train internal FTE

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