



TECHNOLOGY-ENABLED INSURANCE OUTSOURCING

Solutions that Support and Propel
the Specialty Insurance Ecosystem



PATRA AT A GLANCE

Patra powers insurance processes by optimizing and tightly integrating technology with human expertise; supporting insurance organizations as they sell, deliver and manage policies for their customers. Patra's technology-enabled insurance outsourcing services allow **carriers, MGAs/PAs, wholesalers and retail brokers** to capture the Patra Advantage - profitable growth and organizational value.

CORPORATE OVERVIEW

FOUNDED
2005

HEADQUARTERS
El Dorado Hills, CA

GLOBAL OPERATIONS
U.S., Canada, India, & Philippines

EMPLOYEES
6,400+

LICENSED AGENTS
330+

CORPORATELY LICENSED
51 States

STRENGTH IN NUMBERS

98%
CLIENT
RETENTION

72%
TOP 25
AGENCIES

60%
TOP 5
WHOLESALE

24.5M+
TRANSACTIONS
PROCESSED
ANNUALLY

62%
WHOLESALE
VOLUME
PROCESSED

WHO WE SERVE

WHOLESALE BROKERS

Patra's operational experience enables wholesalers to focus on product specialization and market expansion.

MGAs/PAs

Patra's sophisticated underwriting operations help drive growth and enhance broker relationships.

CARRIERS

Patra's direct writer services enable carriers to acquire policies, generate premium and retain customers more efficiently.

RETAIL AGENCIES

Patra's specialized services help agencies accelerate customer acquisition and retention with enhanced profitability.

A DEDICATED STRATEGIC PARTNERSHIP

As a dedicated strategic partner and advisor to your business, Patra helps augment your team, combining experienced staff with state-of-the-art technology to help you thrive in a competitive market. Understanding the complexity of underwriting, wholesale, and E&S operations, Patra addresses the entire policy lifecycle by applying six sigma and business process consulting to identify process and service improvements, deploy best practices and provide industry expertise across a broad continuum of services, including Target Operating Model, underwriting sales, servicing, billing, data management, and claims.

SOLUTIONS FOR YOUR BUSINESS



INSURANCE PROCESSING

Patra's processing experts and consultants address specific workload needs to improve efficiency, increase productivity and grow top-line revenue. From the simplest of tasks to requiring higher degrees of complexity, Patra provides seamless and timely work item turnaround.



CONTACT CENTER

Patra delivers end-to-end solutions that leverage omni-channel contact center technology to manage the life cycle of the insurance customer experience, regardless of channel.



PRINT & VIRTUAL MAIL

Patra offers full-service document fulfillment solutions. State-of-the-art facilities print, mail and process millions of insurance documents each year.



SMALL ACCOUNT SERVICING

Patra's managed service model is a flexible, powerful tool to manage or grow small accounts, whether P&C, benefits or personal.

SERVICES TO SUPPORT THE ENTIRE POLICY LIFECYCLE

SALES / SUBMISSION MANAGEMENT

- Clearance
- Submissions
- Submission Triage
- Rating & Quoting
- Binds
- Indexing
- Risk Evaluations
- Document Retrieval
- Experience Modification Rate Updates
- Inspection Ordering & Review
- Data Entry

POLICY SERVICING

- Policy Issuance
- Policy Administration
- Binds
- Indexing
- Document Retrieval
- Data Entry
- Endorsement Processing
 - Non-premium & Premium Bearing

RENEWAL SERVICES

- Renewal Preparation
- Remarketing & Quote Compare
- Loss Runs
- Document Retrieval
- Indexing
- Risk Evaluations
- Data Entry

CLAIMS SERVICES

- Claims
- Loss Runs
- Indexing
- Data Entry

ACCOUNTING & COMPLIANCE SERVICES

- Compliance & Licensing
- Direct Bill Posting / Reconciliation
- Payment Processing
- Surplus Lines Filing
- Document Retrieval
- Invoicing
- Indexing
- Data Entry

SERVICE MODELS



PRODUCTION BASED
HOURLY



HIGH COMPLEXITY



SPECIAL PROJECTS



FTE BASED
MONTHLY



VOICE ENABLED



STAFF AUGMENTATION

OPERATIONAL EXCELLENCE

Our operational excellence model is what sets Patra apart. With nearly 20 years solely dedicated to the insurance industry, we know your business. This level of expertise becomes a key benefit to our clients as we deliver a hybrid approach to insurance processes combining a global team of specialized experts, innovative technology, and a proven quality framework to deliver greater capacity, expertise and precision to the most complex tasks and processes.