



TECHNOLOGY-ENABLED INSURANCE OUTSOURCING

Solutions that Support and Propel the Retail Insurance Industry

As a dedicated strategic partner to your business, Patra engages in every aspect of the property and casualty lifecycle. From new business, policy servicing, renewal and claims, to accounting and compliance support, our proprietary technology coupled with best-practice insurance processing workflows deliver the following benefits to your agency:

- **IMPROVED EFFICIENCY,**
- **INCREASED PRODUCTIVITY, and**
- **TOP-LINE REVENUE GROWTH.**

Patra simplifies agency operations, alleviating staff workload, optimizing small account management, and enhancing service efficiency. Patra leverages its combination of highly-trained processing executives and cutting-edge technology, empowering you to excel in a fiercely competitive market.

ACCELERATE GROWTH

Patra pushes the limits of today’s insurance technology offerings by applying our industry-leading, tech-enabled approach -- a combination of Patra’s patent-pending, proprietary artificial intelligence (AI), machine learning (ML) and human-in-the-loop expertise -- to prioritize accuracy and accelerate processing while reducing E&O exposure and eliminating backlog.

PROPEL THE P&C LIFECYCLE

Patra’s Property and Casualty (P&C) services provide a comprehensive policy administration solution, covering everything from document retrieval to certificate processing. Our streamlined workflow enhances operational efficiency, elevates the customer experience, and boosts your bottom line. Experience a seamless end-to-end solution that delivers excellence at every step.



CERTIFICATE PROCESSING

Issuing 5M+ certificates of insurance each year, Patra’s processing experts provide quick, accurate, and consistent certificate processing so your agency can focus on what matters most - your clients.



DATA MANAGEMENT

Patra offers data management solutions to seamlessly update, migrate, and manage your data while protecting and ensuring its quality and integrity.



DOCUMENT MANAGEMENT

Patra offers comprehensive document management solutions to expedite policy retrieval, filing, processing, issuance and delivery.



ENDORSEMENT PROCESSING

Our processing executives have years of experience in managing hundreds of thousands of endorsements. Regardless of time of issuance, endorsements are processed accurately and efficiently.



POLICY CHECKING

Featuring Patra’s proprietary patent-pending AI, ML, and NLP technology, best-in-class workflows, comprehensive checklists, and dedicated team of insurance experts, clients experience unmatched quality and efficiency backed by Patra’s E&O.

P&C SERVICES OVERVIEW

Policy Lifecycle Support				Administrative Support	
New Business / Marketing	Policy Servicing	Renewal Services	Claims Services	Accounting Services	Compliance
<ul style="list-style-type: none"> • Loss Runs • Quoting • Ex Mods • Data Entry • Renewal Letters • Proposals 	<ul style="list-style-type: none"> • Policy Checking • Endorsements • Policy Administration • Certificates • Data Entry • Invoicing • Certificate Tracking 	<ul style="list-style-type: none"> • Policy Checking • Data Entry • Certificates • Summaries of Insurance 	<ul style="list-style-type: none"> • Claim Acknowledgement • Claims Follow-up 	<ul style="list-style-type: none"> • Direct Bill Reconciliation • Cash Reconciliation • Invoicing • Direct Bill Posting • Payment Processing • Data Entry 	<ul style="list-style-type: none"> • Notice of Cancellations • Reinstatements • Document Retrieval • Indexing • Data Entry • Audit Processing • Download • Communication Log

A DATA-DRIVEN, STRATEGIC ADVISOR

Growth starts with a winning strategy, and Patra’s strategic advisory approach is designed to help you achieve business success. As an advisory partner who knows insurance, Patra leverages data-driven insights to identify operational gaps, optimize workflows, and integrate new technologies to boost your business performance. Whether during discovery, implementation, or an active partnership, Patra applies six sigma and business process consulting to continually identify process and service improvements, deploy best practices, and provide industry expertise across the entire policy lifecycle.



STRATEGIC GROWTH

Patra begins with an evaluation of your operational infrastructure to identify and implement actionable strategies for improved ROI.



SCALABILITY

Patra identifies and implements the right technological solutions to increase operational capacity to improve your insureds’ experience.



PROCESS OPTIMIZATION

By analyzing existing workflows, Patra identifies process gaps and develops implementation-ready designs for optimal efficiency.



DATA-DRIVEN REPORTING

Through Patra’s data intelligence, we provide KPI reports, processing trends, production volumes, and more to guide strategic business decisions.

