



PATRA ASSIST

Virtual Assistant

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

PATRATM

Virtual Assistant

for **Inter**sure
All Together. Different.

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

IDENTIFY NEEDS

The Patra advisory team, **meets with you** to determine the details of the role and skills needed to add value to your operations.

RECRUIT TALENT

Patra **saves you time**, energy and expense by managing the recruitment process including profiling candidates.

INTERVIEW TALENT

Patra **works on your behalf**, interviewing and pre-screening qualified candidates.

ONBOARDING

To provide a **seamless onboarding experience** for you, Patra oversees all tech and equipment setup.

TRAINING

Patra **provides the training platform**, so you can quickly and easily connect with your virtual assistant and begin training.

MANAGEMENT

Patra manages the HR and office environment and infrastructure allowing you to focus entirely on the workflow.

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 maintains SOC 2 Type 2 compliance and ISO/IEC 27001:2022 certification to ensure the safety and privacy of our customers' 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

	<div>RETAIL \$7.5M Annual Revenue 30 Employees</div>	<div>RETAIL \$291M Annual Revenue 300 Offices in US</div>	<div>RETAIL \$215M Annual Revenue</div>
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 eliminationProcess standardization	<ul style="list-style-type: none">Process standardization & centralizationImproved capacity to scale	<ul style="list-style-type: none">Decrease in employee churnImproved margins
RESULTS	<ul style="list-style-type: none">50% cost savings v internal FTE2 VAs processing the work of 3 internal FTEsPatra ramp time 1 week v agency 90-day timeline	<ul style="list-style-type: none">Developed scalable, efficient and standardized processProcess performed by 3 Patra VAs v 20+ internal FTEs	<ul style="list-style-type: none">22-33% reduction in hourly costs to process tasksPatra ramp time 2 weeks v 3-4 months to recruit, hire and train internal FTE

For More Information Contact:

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