






Virtual Assistant

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