



ACQUISITION & CUSTOMER EXPERIENCE

Omni-channel technology to enhance and improve customer experience

Patra Direct provides a flexible, end-to-end solution that deploys omni-channel communication tools to your existing management systems, supporting every part of the customer experience. Inbound or outbound, Patra Direct supports your customer contact centers with voice, email, text, and chat to deliver your brand experience.

Our knowledge of direct-to-consumer insurance marketing and strategy allows us to support new products, customer initiatives and special projects. Patra Direct provides highly educated, experienced insurance staff within a comprehensive metric reporting environment.



Omni-channel communication technology



Flexible and scalable model to manage your contact center



More than 330 licensed agents to represent your brand



Improve process efficiency and consistency



Improve customer service

WHO WE SERVE

RETAIL AGENCIES

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

WHOLESALE BROKERS

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

MGAs

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.

HOW PATRA DIRECT MAKES A DIFFERENCE

Patra Direct provides easy solutions to implement new contact centers, transition from existing centers or test new initiatives.

CUSTOMER CONTACT CENTER

- Policy acquisition & premium generation
- Multi-level customer service
- Policy owner retention
- Cross-sell & up-sell
- Endorsement processing and distribution
- Lead qualification

FNOL/CLAIMS SUPPORT

- First notice of loss
- Claims data input
- File management

POLICY OWNER SERVICE

- Payment processing for new, renewal and endorsement premiums
- Customized payment portal development
- Tele-underwriting

TECHNOLOGY

- Chat/chatbots
- Email
- Click-to-call
- Social media monitoring
- Digitization at the source
- Website analytics

WORKFLOW CAPABILITIES

- Upgrade at issue
- Cross-sell & up-sell
- Customer service
- Endorsement processing and distribution
- Policy owner retention
- Lead qualification
- Premium processing
- Claims support

PRODUCT EXPERTISE

COMMERCIAL LINES

- Commercial package/BOP
- General liability
- Workers' comp
- Commercial property
- Commercial auto
- E&O
- D&O
- EPL
- Excess/umbrella
- Cyber liability
- Surety

PERSONAL LINES

- Auto
- Homeowners
- Motorcycle
- Renters
- Umbrella
- RV
- Marine



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