



Turn small accounts from a margin drag into a managed, measurable profit center.

WHAT IS PATRA'S SMALL ACCOUNTS MANAGEMENT SOLUTION?

We manage small accounts for insurance agencies, brokerages, COOs, and operation leaders who need to protect margins without sacrificing service quality. Dedicated US-licensed account managers own each book under your brand, supported by AI-enabled workflows and Patra's delivery infrastructure.

SMALL ACCOUNTS DON'T PAY FOR THEMSELVES

When rate-driven commission growth fades, the true cost of the small-accounts book becomes harder to ignore.

THE ECONOMICS DO NOT WORK

Servicing a \$900 account can cost nearly as much as servicing a \$9,000 account, but returns only a fraction of the revenue.

MORALE TAKES A HIT

Transactional work burns out licensed staff. Turnover creates months of lost productivity and constant management friction.

YOUR BEST PEOPLE GET TRAPPED

Senior account managers spend time on low-value accounts instead of growth, key relationships that drive revenue, and complex client needs.

WE CHANGE THE ECONOMICS

The same small-accounts book that loses money inside your agency is designed to make money inside of ours — guaranteed.

WHITE-LABELED SERVICE

We work through your brand experience, telephone greetings, email domains, and agency systems.

A-TO-Z ACCOUNT MANAGEMENT:

We support small business books across Personal Lines, Commercial Lines, and Employee Benefits.

CAPACITY FOR GROWTH

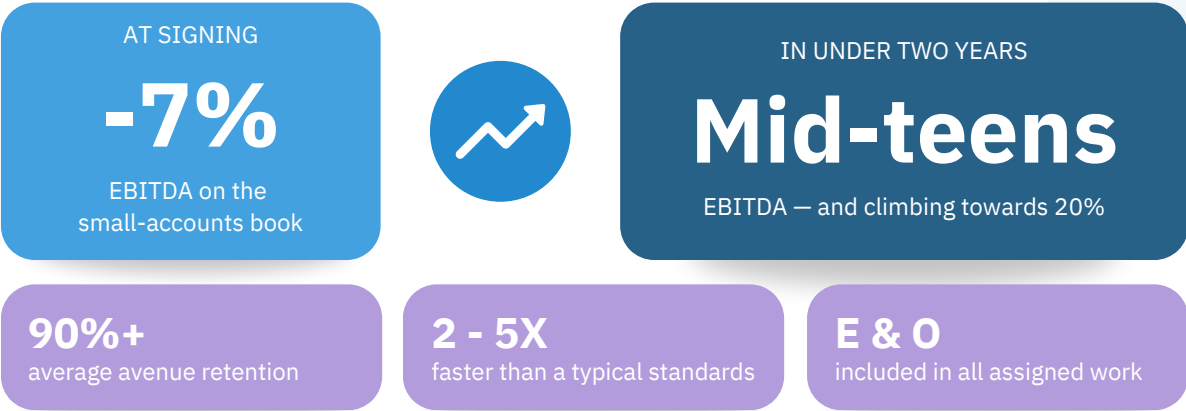
Your internal team can spend more time on key accounts, producer support, and relationship development.

CONTROL REMAINS WITH YOU:

You retain the Broker of Record, agency relationship, and strategic account decisions.

OUR CUSTOMER’S SUCCESS STORY

We managed \$1.4M in revenue with over 5,500 personal lines policies for a retail brokerage.

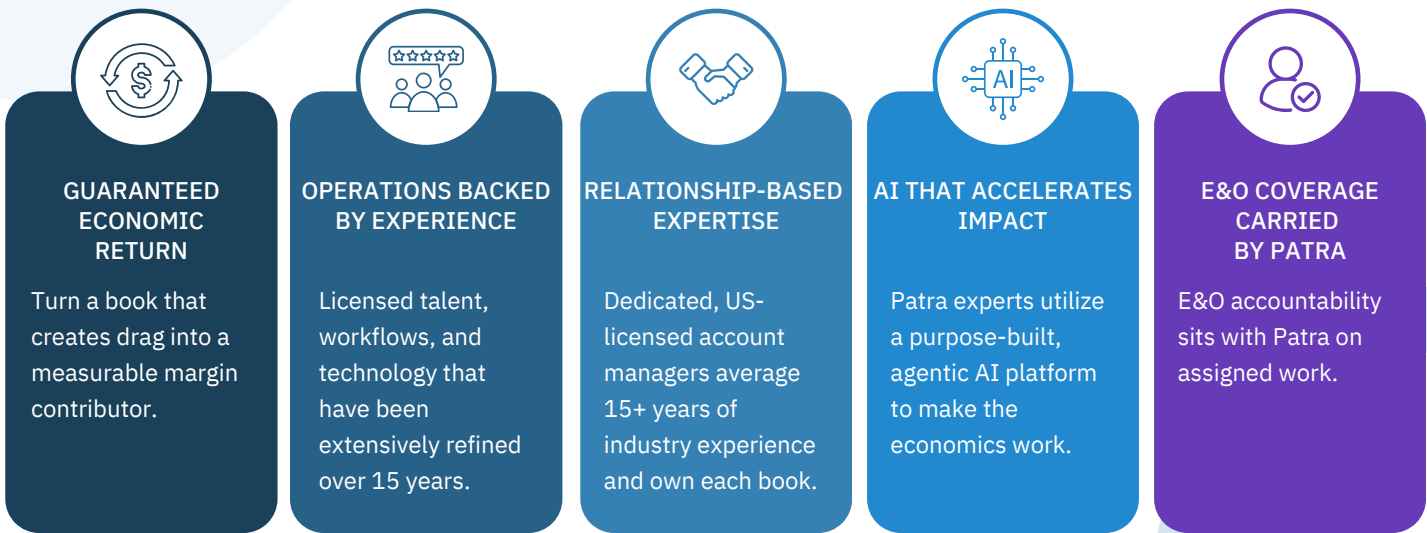


BY THE NUMBERS

Built on our 20-year global delivery infrastructure, Patra has become the largest private manager of small-market business in the U.S.



WHAT SETS PATRA APART



HOW IT WORKS

Identifying the book of business

You identify the accounts to be serviced by Patra's licensed account managers.

01

Recruiting and interviewing

Patra sources and interviews candidates aligned to your book and service needs.

02

Onboarding and training

Patra oversees all equipment setup, access preparation, and training.

03

Implementation

Patra partners with you to implement best practices for all assigned processes.

04

Management

Patra manages team performance and tracks KPIs to ensure service levels are met.

05

Review and align

Patra provides regular performance reports and reviews to keep goals aligned over time.

06

PATRA MANAGES...

- Licensed account management capacity
- Renewals, endorsements, and servicing requests
- Client communications and account support
- Recruiting, training, HR, infrastructure, and security
- KPI tracking, performance reporting, and ongoing reviews

YOUR AGENCY RETAINS...

- Broker of Record and account relationships
- Workflow direction and service priorities
- Your brand experience and customer trust

HOW TO START

1. BOOK ANALYSIS

Separate Personal Lines, Commercial Lines, and/or Employee benefits.

2. ANALYSIS REVIEW

Review pricing and commission return, U.S. and international staffing requirements, system access results, and Patra Security approval.

3. ESTABLISH A PLAN

Discuss the partnership model and mitigate any impact to people, culture, and operations before launch.

BUILT-IN SECURITY AND CONTINUITY

CERTIFIED CONTROLS

SOC 2 Type 2 compliance and ISO/IEC 27001:2022 certification.

SECURE ACCESS

VPN with AES256 encryption and functionality limited to the Patra environment.

DATA PROTECTION

Single Sign-On, Data Loss Prevention, SIEM systems and encrypted hard drives.

OPERATIONAL RESILIENCE

Geographically stable processing centers and audited recovery protocols.

READY TO CHANGE THE ECONOMICS OF YOUR SMALL ACCOUNTS?

Schedule a book analysis with Patra today.

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