PATRA™

Data Management

Your data integrity is our top priority

Clean and accurate data is essential to making sound business decisions, effectively managing customer relations, and optimizing opportunities for new business and increased revenue.

With the insurance industry's complex network of systems and unique data management workflows -- retail brokers, wholesalers, MGAs and carriers are overloaded with allocating front-line service teams and resources to migrate, clean and manage data.

Patra offers a suite of data management solutions to seamlessly update, manage, and ensure the quality and integrity of your data. Our scalable and flexible workflows support all data functions across P&C and Employee Benefits processes.

WHY CHOOSE PATRA

- Reduced E&O risk

- Improved operational efficiency

- Seamless and secure integration with various carrier portals and agency, document and policy management systems

DATA ENTRY

With flexible and scalable capacity, we take on a multitude of data entry workflows prioritizing your business needs and timelines — allowing your team to focus less on data, more on strategic and revenue generating tasks.

DATA MIGRATION

Patra's proven workflow methodology prioritizes accuracy, speed and minimal customer disruption. Our end-to-end data migration services include data extraction, upload, validation, and workflows to maintain data integrity.

DATA CLEAN-UP

Patra orchestrates a team of data experts and automation processes to accurately and efficiently clean data sets across your organization's primary data sources and platforms.

SYSTEM AGNOSTIC

Document Management

Certificate Management

Agency & Policy Management

Lead Management

Benefit Admin

> ## "
> ## PATRA HAS DEVELOPED AN OUTSTANDING REPUTATION IN THE INDUSTRY. THEY HELP REDUCE TIME SPENT ON REPETITIVE TASKS AND/OR PROJECTS WHICH WE ALL KNOW, 'TIME IS MONEY' AND HAVING THE ADDITIONAL TIME HAS ALLOWED MY TEAM TO FOCUS ON SERVICING THE DAY-TO-DAY REQUESTS OF OUR CLIENTS. THIS IS A TOP PRIORITY IN OUR WORLD!

MICHELLE CISNEROS
DIRECTOR OF OPERATIONS,
HUB INTERNATIONAL

PATRA™

4207 Town Center Blvd
Building A, Suite 100
El Dorado Hills, CA 95762

(415) 884-8008
info@patracorp.com
www.patracorp.com