



## CLIENT SUCCESS STORY



# USI finds success with Patra's tailored insurance processing & small account solutions.

USI Holdings Corporation is a leader in insurance brokerage and consulting in P&C, employee benefits, personal risk services, retirement, and program and specialty solutions. USI began in 1994 with a single office with \$6.5 million in revenue and 40 associates. Today, USI is approaching \$2 billion in revenue, with more than 6,000 associates, in more than 150 offices across the country.

## A Tailored Solution

Since 2007, USI and Patra have partnered to develop strategies that drive efficiency, lower costs and reduce errors. Currently, Patra processes nearly 80% of USI's certificates and continues to develop and implement new managed services for USI.

Patra's ability to tailor a solution to fit unique agency needs has allowed us to develop new managed services based on USI's specific needs. Currently, Patra performs 12 distinct services for USI:

- › Certificate Issuance
- › Policy Checking
- › Direct Bill Reconciliation
- › Claims Data Entry
- › Employee Benefits Services
- › Loss Run Ordering
- › Returned Mail
- › Quote Preparation

## Solution at a Glance

### Challenge

As USI's business grew, proper staffing was needed to keep up with time-consuming processes.

### Solution

Patra tailored a solution that focused on driving efficiency, lowering costs and reducing errors.

### Result

Patra OnDemand, insurance processing services, and Patra Select, small account services, enabled USI's account managers to spend more time growing existing business and increasing client retention.

- › Data Entry Special Projects
- › Indexing
- › Printing and Mailing Services
- › Select P&C Services



***Revenue load is one of our leading metrics. We've seen that number rise as we free employees to spend time on more profitable tasks, including spending time with clients, cross-selling and up-selling products that fit the client's needs.***

**Stew Gibson**  
Sr. VP & CIO, USI Holdings Corp.

## Enabling Growth

Patra allows USI to manage growth without adding staff or asking existing staff to take on larger workloads. Account managers now focus on customer relationships, retention and service, and as a result, USI has seen growth with existing clients through account rounding, cross-selling and higher retention rates.

## Supporting Time Management

Patra specializes in providing tailored services to insurance brokerages, ensuring solutions are specific to established business processes. This gives USI account managers the ability to plan their days with confidence, knowing that work will be done on time and with reduced errors.

## Delivering Quality and Security

USI values Patra's E&O coverage and U.S.-based quality assurance team, which reduce their exposure to risk. Patra's dedicated USI Process Executives work in three shifts, providing 24-hour support, and allowing USI account managers to see work in real-time, over a secure network.



### Company Profile

One of the ten largest insurance brokerage firms in the U.S.

### Client Since

2007

### About the Company

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