



# PATRA™

## CASE STUDY



*“We’ve been very pleased with our assistants’ work ethic, quality and professionalism. Patra made a huge difference in our agency for the better.” - **President David Sidle, CIC, CPIA***

## AT A GLANCE

### CLIENT PROFILE

- Retail Agency
- New York
- Personal & Commercial - Auto & Home, Personal, Life & Health, Business, Landlord, Farm Insurance

### CHALLENGES

- Industry-wide talent shortage
- Account managers overtasked with manual, back-office work
- Poor policyholder experience & retention
- Reduced agency growth & profitability

### REQUIREMENTS

- Highly skilled, knowledgeable insurance assistants
- Streamlined talent sourcing, hiring & onboarding
- Accelerated staff ramp-up time

### PATRA SOLUTION

- Patra Virtual Assistant Service - Patra Assist

### POSITIVE OUTCOMES

- Eliminated office backlog in two weeks
- Increased account manager productivity
- Improved policyholder satisfaction & retention
- Profitable, growing book of business

## CHALLENGE

Growth. It’s on every agency’s agenda. But the insurance industry’s talent crisis makes it difficult to seize even the most promising opportunities. Sidle Insurance & Risk Management, a retail agency in the greater New York area, knows firsthand the challenges created by a tight labor market. “The entire staff was overwhelmed,” said agency President David Sidle, CIC, CPIA. Account managers spent more time in the back office than servicing the book of business, which motivated Sidle to learn more about Patra Assist.

## SOLUTION

Patra consulted with Sidle to learn about the agency’s needs, such as managing policy documents, processing claims, and conducting research. Patra recruited and selected a full-time virtual assistant to seamlessly integrate into Sidle’s environment and operate as an extension of the agency’s team. Patra managed the assistant’s training and onboarding, too. While most internal new hires require 90 days to master an agency’s customer values, management systems, or workflows, Patra’s virtual insurance assistants ramp up in as little as two weeks.

## OUTCOME

Sidle saw an immediate impact. In 14 days, Patra Assist eliminated office backlog, enabling Sidle’s account managers the capacity to craft bespoke insurance strategies for its diverse clientele. “My staff could focus on serving our book, reviewing renewals, and writing new business. Our policy and customer retention improved, and new business numbers improved as well,” he said. The assistant’s experience, quality, work ethic and professionalism played a significant role in the agency’s success. As Sidle’s book of business grew, the agency invested in a second virtual assistant. “Patra made a huge difference in our agency for the better,” Sidle confirmed.

## CONCLUSION

The talent crisis is forcing even the most successful agencies like Sidle Insurance & Risk Management to achieve more with fewer resources. That’s why agencies use Patra Assist to achieve their business and operational goals, without the burden of administrative or HR costs associated with hiring full-time staff. Patra’s virtual assistants help with a variety of insurance back-office and client-facing support, so agencies can focus on business growth and delivering policyholder value.