



# Process Feature: **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 workflows to manage data -- retail brokers, wholesalers, MGAs and carriers are overloaded with allocating front-line service teams and resources to migrate, clean and manage data entry.

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 entry functions across P&C and Employee Benefits processes.

### Why Agencies 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 P&C and EB data sources and platforms.



# System Agnostic

**Document Management**: WORKSMART, paperwise, CBSDoc, OnBase by tyland, iManage, DocStar, ImageRight, ecertsonline, CSR24, EZLynx

**Certificate Management**

**Agency & Policy Management**: APPLIED, Sagitta, nexsure, AMS360, bwise media, GEN4, Microsoft Dynamics CRM, salesforce, BenefitPoint, AIM, veruna

**Lead Management**: zendesk, Policy Crusher®

**Benefit Admin**: employee NAVIGATOR, brms, ease, flock, HRconnection, workday, benefitsCONNECT®

**“** The Patra Corporation has developed an outstanding reputation in the industry. They help to reduce time spent on repetitive tasks and/or projects which we all know, ‘time is money’ and happier clients too. Having the additional time has allowed my team to focus more on servicing the day-to-day requests of our clients and their employees. This is a top priority in our world!

**Michelle Cisneros**  
Director of Operations  
HUB International



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To learn more, complete the **Contact Us** form on our website.