

INSURANCE PROCESSING FOR SMALL BROKERS

Customized, Flexible Solutions
to Elevate the Customer Experience



PATRA[™]
Assist

Patra's staffing assistance solutions arm your service team with dedicated customer service representatives (CSRs) that operate within your agency hours, management systems, communications platforms and workflows.

If you're a small insurance broker, chances are you're continuously looking for ways to streamline operations and improve your bottom line while reducing staff strain and elevating the customer experience. In today's competitive hiring environment, the latter has never been more challenging.

Patra Assist provides your organization with a dedicated CSR team to support and streamline insurance processing and transactional functions and deliver an exceptional customer experience to your clients. Operating within your agency hours, management systems and communication systems, the Patra Assist CSR team is a seamless extension of your team without the burden of recruiting, onboarding and managing the ongoing HR requirements.

The process is simple:

Identify Your Business Needs

We listen. Patra meets with you to determine the details of the role and skills needed to add value to your operations.

Recruit the Talent

We save you time managing recruitment process; profiling candidates.

Interview Candidate

We work on your behalf interviewing and prescreening qualified candidates.

Your Interview

We want to make sure it's a right fit. We bring the most qualified candidates to you.

Onboarding

We provide a seamless onboarding experience overseeing all tech and equipment set up.

Training

We provide the platform to train. Set up to easily connect with your CSR and begin training.

Management

We take care of the infrastructure. Patra manages HR & office environment; allowing you to focus entirely on the workflow.

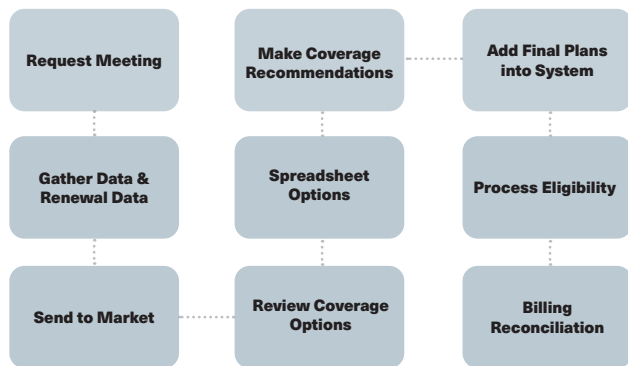
Once on board, your Patra Assist team delivers consistent, efficient, and superior levels of customer service and throughput via a combination of automated workflows, best practice procedures and exceptional customer service training.

A Scalable Solution to Improve Service Delivery, Reduce Operating Costs and Grow Your Business

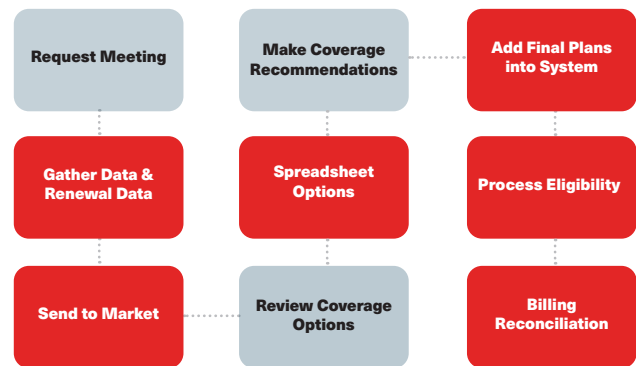
With Patra Assist, you can focus on your business without the burden of administrative or HR costs that come with hiring part- or full-time staff. Your Patra Assist CSR engages in the Benefits cycle providing support such as adding final plans into systems, gathering census and renewal data, providing spreadsheet options, process eligibility, and billing reconciliation.

PATRA ASSIST FOR EMPLOYEE BENEFITS

Traditional Agency Workflow



Where Patra Assist Engages in the Sales Cycle



OTHER AREAS OF SERVICE

Eligibility Management

- › Enrollments, terminations, and changes
- › COBRA notifications
- › Carrier billing reconciliation

Renewal & Marketing

- › Renewal report generation
- › Carrier renewal extraction
- › Quoting & proposals
- › Pre-renewal communications

Compliance Communications

- › Summary & form downloads
- › Disclosure population
- › Open enrollment communications
- › Wrap documents

Accounting & Billing

- › Commission Posting
- › Reconciliation

Data Entry

- › AMS updates
- › Ben admin system build out
- › Renewal/marketing proposals
- › Acquisition integration
- › Experience reports

