

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 family-owned or independent agency or a broker agent, 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.

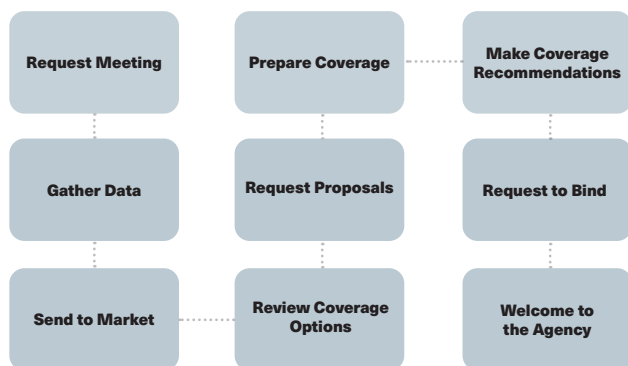
Once on board, your Patra Assist team delivers consistent, efficient, and superior levels of customer service and throughput via a combination of automated workflows, best practice procedures and exceptional customer service training.

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

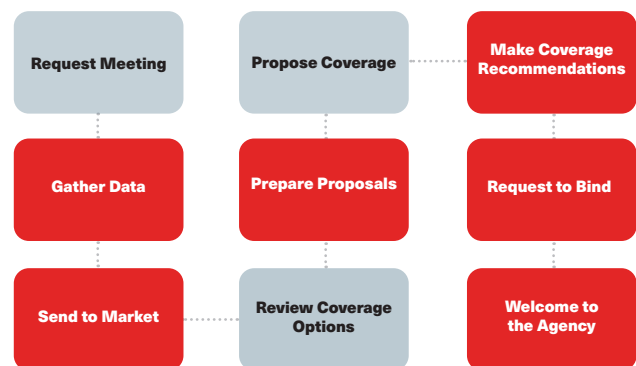
With **Patra Assist**, you can focus on your business without the burden of administrative or HR costs that come with hiring part- or full-time staff. Your **Patra Assist CSR** engages across the full P&C policy lifecycle including renewal support, billing and payments, preparing proposals as well as policy and welcome material production.

PATRA ASSIST FOR P&C

Traditional Agency Workflow



Where **Patra Assist** Engages in the Sales Cycle



OTHER AREAS OF SERVICE

Policy Management

Renewal Support

- › Application updates/submission
- › Data requests
- › Proposal submission

Endorsement Processing

- › Process/issue endorsement requests

Certificate Processing

- › Generate/issue certificates
- › Manage holder lists

Policy Checking

- › Check policies for discrepancies

Accounting

Direct Bill

- › Enter and reconcile DB commissions

Billing and Payments

- › Process invoices for agency and direct billed policies

Notice of Cancellation

- › Investigate, send notice and follow ups

Commission Entry

- › Enter and reconcile producer commission and splits

Agency Billed

- › Invoicing, post premiums and payments

New Business

Gather Data

- › Loss runs, certificate holders, data schedules

Send to Market

- › Create submission or enter to carrier sites

Prepare Proposal

- › Using agency template and standards

Request to Bind

- › On carrier sites or through underwriting

Welcome to Agency

- › Send policy packets and welcome material

