

SMALL ACCOUNT SOLUTIONS

Increasing profitability and growing your book of small accounts for benefits brokers.



PATRATM
Select

We understand the amount of time managing small groups can take from your staff. Patra's small group solutions extend your ability to address a high volume of incoming small account leads without compromising your ability to service key agency accounts.


The Patra Small Account Management team seamlessly integrates with your agency to efficiently manage and grow your books of small business. Our managed service model provides a variety of options to address employee benefits. Your team can spend more time focusing on key accounts and agency relationships without sacrificing the service levels your customers expect.

Patra is invisible to your insureds—our staff integrates to your agency systems to work through your company's branded telephone greetings and email domains. In addition to your dedicated Patra Select team, we'll assign secondary and tertiary staff support to cover emergencies, vacations and other PTO, ensuring no disruption to your customers.

Let us show you how Patra Select can make a difference.

With Patra Select, you'll be confident that your small accounts are well-managed, rounded out and profitable. But why else should you choose Patra? Let us count the ways.

- › **Patra Select is backed by the most agency-friendly E&O coverage in the industry.**
- › **Patra services are designed to maintain and enhance your agency's reputation, service levels and brand presence.**
- › **Patra Select services generate a guaranteed return on commission - that means, increased margins on your books of small accounts.**



Organizations committed to **GROWING** their business, choose **Patra** as their insurance processing partner.

ANSWERS TO THE MOST ASKED QUESTIONS REGARDING PATRA SELECT

Will I still have control of my small accounts?

Yes. Your accounts will always be your accounts. Patra team members will work within your existing agency management system to service your accounts. And don't worry, transferring accounts back to the agency is as easy as recoding in your agency management system.

Who will be the Broker of Record?

Your agency will hold the Broker of Record and all data will reside within your existing Agency Management System. Patra's licensed account managers will work as an extension of your team. All work is white labeled and configured to your agency brand, with no perceived change to the insured.

How long will it take to be up and running?

Through onboarding clients since 2005, we have developed a very thoughtful, organized, and sophisticated implementation program. We begin immediately by analyzing your book of small accounts and find that most customers have our services fully activated in 90 days, though pace is dictated by the individual agency.

How does Patra define a small account?

Patra understands that every agency uniquely defines their small accounts. For some it means under \$100 managed revenue per account, for others it means under \$500, or for others it means under \$10,000. We find it most common that agencies define their small accounts as under \$2,500 managed revenue, but we can work with whatever you call small.

What services are included in the Patra Select EB model?

Your Patra team will manage every aspect of your book, from answering calls and managing eligibility changes to marketing new business and rounding accounts.

What happens in the event that my Patra Select Account Manager is out of the office?

As a Patra Select customer you are assigned a full time, dedicated account manager, with years of agency experience, to lead your team. To ensure no gaps in coverage should your account manager be out of the office, we also train and coordinate second and tertiary staff support to cover all service needs during an absence.



Higher **customer satisfaction**, driven by **improved service**, and faster **processing times**, drives **PROFIT** through increased customer retention.

A COMPREHENSIVE SUITE OF SOLUTIONS FOR YOUR BUSINESS NEEDS

From tech-enabled back-office processing teams, to dedicated experts performing staffing assistant services, to Patra account managers servicing a book of small business on your behalf, to complete management of your virtual print and mail room, Patra has the solutions that help you drive growth, profit, and value.

The Customer Experience

We deliver a customer centric experience truly invested in your success. Leveraging innovative technology and our industry expertise, we help move your business forward.

Foundation for Success

Patra's experienced solutions consultants and onboarding specialists make it easy for your team to identify and adopt the best tech-enabled solutions that will accelerate your path to ROI.

Channeling Partnership Success

Once onboarded, we partner you with a tailored service team to ensure you're getting the most out of our service(s) and achieving your goals.

Unifying Systems and Workflows

Patra's proven integration process prioritizes data security with minimal disruption. We are an extension of your team, delivering a white label customer experience.

Quantifying Success

Patra empowers you to make data-driven and strategic business decisions by providing data analytics and KPI performance metrics through RPA, Hybrid Cloud, and ML.

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