PATRA™

As *books of business* grow, so does the volume of routine requests behind them. We solve the operational constraints *holding your business back.*

Patra's property and casualty services cover the policy lifecycle: new business, policy servicing, renewal, claims, and accounting and compliance support. We orchestrate insurance operations through an agentic AI platform with insurance professionals in the loop, so your team stops coordinating between vendors and managing systems and focuses on what moves your business forward.

What Patra does

We orchestrate insurance operations for every segment of the distribution chain with a consistent operating model: an agentic AI platform built specifically for insurance, experienced insurance professionals handling judgment calls and exceptions, and E&O coverage on the work we perform.

However you engage with Patra – running entire workflows through the platform or putting our licensed teams to work inside your operations – the same technology and experts in the loop power every engagement.

Managed services

Orchestrate entire operational workflows – new business through renewals, policy administration through billing. Agentic AI handles the repeatable work; insurance professionals handle exceptions and decisions.

Small account management

Small accounts either don't get the attention they need or consume more time than they're worth. We run them under your brand and at your service standard, turning a margin drag into a profit center while your producers focus on the accounts that need them.

Virtual assistant services

Insurance-certified remote professionals who handle administrative and operational work inside your existing systems. Where managed services orchestrate full workflows, virtual assistants extend your team for high-volume, repeatable tasks.

Print and mail services

Over 15 million insurance documents printed and mailed annually, from compliance notices to renewal materials. Handle volume swings without managing equipment, staff, or square footage.

Direct call center services

Insurance professionals answering policyholder inquiries across phone, email, chat, and social channels. Flex from two seats to 200 without adding headcount. White-labeled, so policyholders experience your brand.

Insurance operations for *every level* of the distribution chain

Scan to learn more

Why Patra

Innovation, depth, and scale used to be tradeoffs. Not anymore.

- **One partner, one SOW**
  Instead of managing multiple vendors and handoffs, you work with a single provider who implements and owns the full workflow. Handoffs are built into the process, not something you coordinate.

- **Outcomes-focused delivery with accountability**
  We provide E&O coverage on the work we perform – accountability that AI tools and staffing models don't carry. If something we deliver misses a requirement or creates a client issue, we own it.

- **AI-powered without the AI burden**
  You get the speed and accuracy benefits of agentic AI without building, maintaining, or staffing around it. Our platform handles the repeatable work; our insurance professionals handle exceptions and judgment.

- **Built inside your systems**
  Every engagement integrates within your existing workflows and systems. Nothing moves to ours. Your team operates the same way; only who's carrying the operational volume changes.

We run the work, commit to the results, and carry E&O coverage on the work we deliver.
Better outcomes. Less risk. The confidence to stand behind both.

20 yrs of proprietary insurance processing data	**25M+** transactions processed per year	**99%+** platform accuracy with expert validation
800+ workflows powering the platform	**2** AI and technology patents	**$10M+** invested in the platform annually

Ready to run your operations *differently?*

Let's talk about which workflows are the highest-value place to start.

PATRA™

207 Town Center Blvd Building A,
Suite 100 El Dorado Hills, CA 95762

(415) 884-8008

info@patracorp.com

www.patracorp.com