



Routine until it isn't: *Three everyday insurance workflows, with and without a Patra VA*

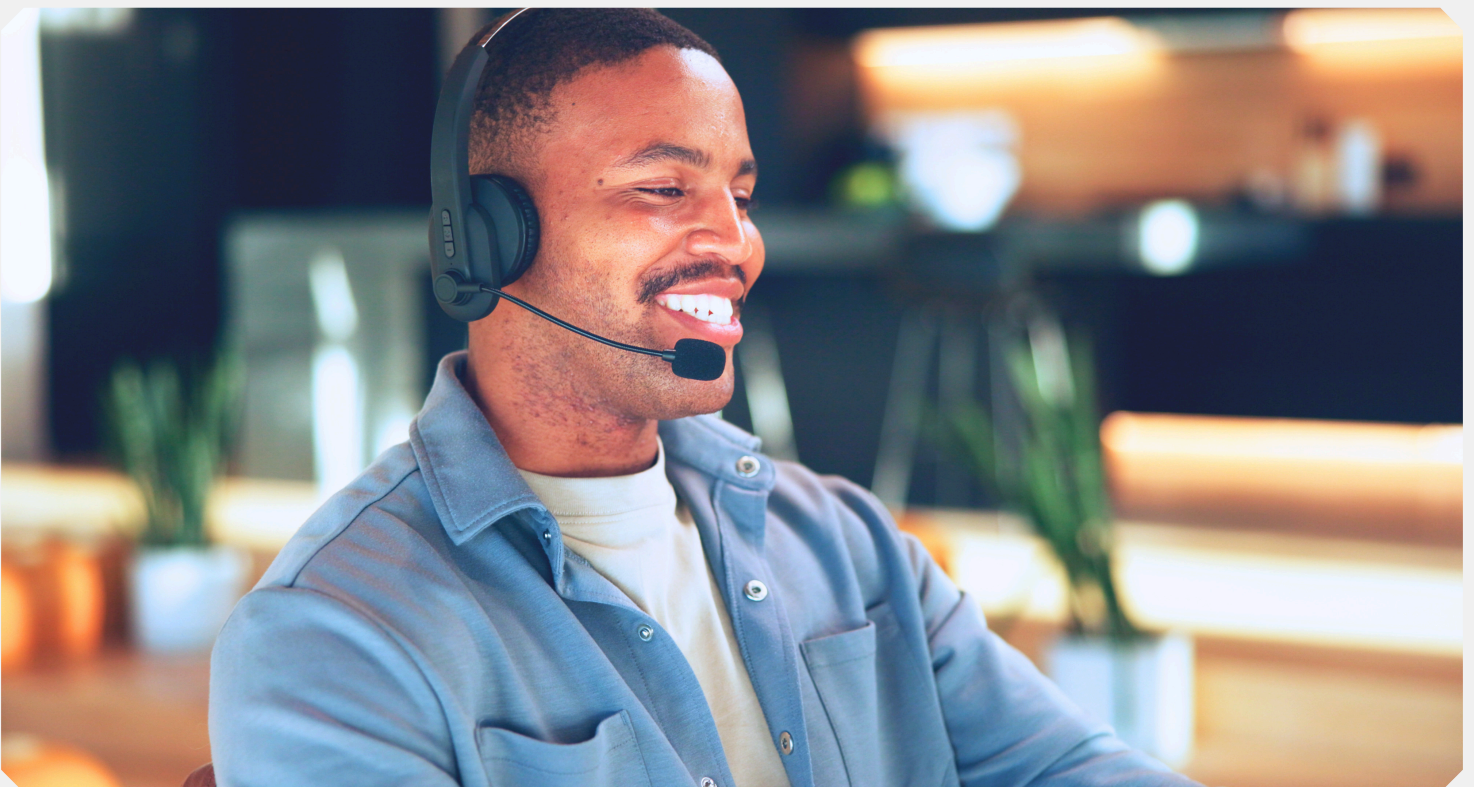
See where dedicated VA support can remove bottlenecks, improve follow-through, and ease the administrative load on internal teams.

Routine insurance work rarely stays routine when no one has the capacity to keep it moving. A renewal identified too late can become a last-minute rush. A certificate request buried in an inbox can delay a client's job.

An incomplete new business submission can stall before it reaches the market. In each case, internal teams must pause higher value work to gather information, prepare documents, and chase for follow-ups.

That's where Patra's Virtual Assistants (VAs) come in. Our VAs can monitor upcoming work, collect information, prepare documentation, update the AMS, and track progress, while internal teams stay focused on coverage decisions, client conversations, and the work that actually requires their expertise.

Here's how VA support can change three common insurance workflows:



Commercial lines policy renewal

Scenario: A commercial lines account is up for renewal in 60 days.

Step	Without a Patra VA	With a Patra VA
1. Spotting the renewal	The renewal surfaces on an expiration list only two to three weeks out. The account manager (AM) is pushed to react quickly.	The VA runs a 90-day renewal report every week, and flags what's coming early. Nothing slips through.
2. Updating exposures	Between other tasks, the AM chases the client for updated payrolls, values, or vehicle schedules. Details arrive late.	The VA requests for updates, collects the documents, and refreshes the AMS so the file is ready for submission.
3. Remarketing	The AM completes ACORDs and submits them to markets late (often the night before the deadline), leaving little time to resolve any gaps.	The VA prepares the ACORDs, submits them to carriers and portals, and tracks each quote as it comes back.
4. Building the comparison	The AM assembles the spreadsheet comparison and proposal under time pressure, with little room to shop coverage.	The VA compiles the quotes into a clean side-by-side comparison, and drafts the proposal for the AM to review.
5. Presenting & binding	The AM rushes the client conversation, sometimes after expiration, which puts retention at risk.	The AM presents earlier with a polished proposal, with the VA supporting proposal prep, endorsements, and AMS updates.

Bottom line:

Without a VA, the renewal becomes a last-minute scramble and retention risk. With a Patra VA, the work starts earlier, the pipeline stays visible, and the AM has more time to stay focused on the client relationship.

Certificate of Insurance (COI) request

Scenario: A client emails at 4:45 p.m. needing a COI for a job that starts the next morning.

Step	Without a Patra VA	With a Patra VA
1. Catching the request	The email lands in the AM's crowded inbox and may not be seen until the next day — after the client's job was supposed to start.	The VA monitors the service inbox and picks up the request within minutes.
2. Checking requirements	The AM stops what they're doing, pulls the policy, and reviews the contract's insurance requirements.	The VA verifies coverage and the holder's requirements against the AMS and the policy.
3. Generating the certificate	The AM produces the ACORD 25 manually and determines whether an additional-insured endorsement is needed.	The VA generates the COI from your approved templates, and flags it if any additional-insured endorsement is required.
4. Checking & sending	If there's still time before the end of the day, the AM reviews the certificate and emails it to the client.	The VA quality-checks and sends the COI on the same day, before logging it in the AMS and filing the request.
5. Handling follow-ups	Revision requests and repeat certificate holders pile back up on the AM's desk.	The VA handles revisions and tracks recurring holders so future COIs are ready ahead of time.

Bottom line:

Without a VA, an urgent request can interrupt the AM's day or delay the client. With a Patra VA, the request is picked up, checked, completed, and recorded before it ever becomes a service issue.

New business submission

Scenario: A producer is preparing a new business submission that requires complete intake details, supporting documents, accurate forms, carrier-ready packaging, and consistent follow-up.

Step	Without a Patra VA	With a Patra VA
1. Intake	Intake details pile up as internal teams juggle emails, calls, and competing priorities. The submission is delayed before work even begins.	The VA captures and organizes submission details and required fields, confirms key information, and creates a clear checklist to move the process forward.
2. Documentation	Internal teams spend hours chasing missing loss runs, ACORDs, schedules, and other required documents.	The VA gathers missing documents and follows up with clients and carriers to keep information moving.
3. AMS and forms	Manual data entry creates bottlenecks and errors as internal teams rekey information, build forms, and manage multiple systems.	The VA enters data in the AMS, populates ACORDs and applications, runs data checks, and flags exceptions for internal team review.
4. Submission	Internal teams lose time packaging submissions, uploading files to portals, managing naming and versioning, and fixing last-minute issues.	The VA compiles the complete submission packet, prepares supporting materials, assists with portal uploads, and ensures that submissions meet carrier or wholesaler requirements.
5. Follow-ups	Limited visibility slows follow-up and decision-making as internal teams chase status updates and outstanding items.	The VA monitors submission status, follows up on outstanding requirements, updates the AMS, and keeps producers informed of responses and next steps.

Bottom line:

Without a VA, internal teams spend hours on repetitive, time-consuming tasks that can delay submissions. With a Patra VA, the workflow keeps moving while internal teams focus on strategy, relationships, and closing more business.



What changes with dedicated VA support

The difference between these workflows isn't just who completes the tasks—it's whether the work moves forward early, or stalls until it becomes urgent.

Without dedicated support, insurance teams must fit routine preparation and follow-up around competing priorities. That leaves less time to review coverage, advise clients, and manage relationships.

With a Patra VA, administrative and executional steps have a consistent owner. Renewals can begin earlier. Service requests can move faster. Submissions stay organized, records stay current, and fewer tasks depend on someone finding the time between their other responsibilities.

Internal teams still own the client relationship and the decisions that require insurance expertise, while the VA keeps the work around those decisions moving. The result is a more proactive workflow, fewer preventable delays, and more time for your clients and your growth.

Give your team *more time* for the
work that *only they can do*

TALK WITH PATRA ABOUT WHERE A DEDICATED VA COULD
HELP SUPPORT YOUR WORKFLOWS.

