



What your first 90 days with a *Patra Virtual Assistant* could look like

The hardest part of adding support shouldn't be waiting months for that support to become productive. Patra's Virtual Assistants (VAs) arrive with their insurance training and certifications already completed, which means that instead of teaching them the basics, your onboarding can focus on your agency's systems, specialized workflows, and service standards.

With the right preparation and a structured integration plan, your Patra VA can begin contributing from Day one, take on more responsibility over time, and create measurable capacity for your team—all within the first 90 days.

Here's what that can look like.



Before launch: *Preparing for a strong start*

Before your Patra VA comes on board, it's essential to establish the foundation for an efficient integration.

By launch day, you should have:

- Identified and prioritized the 10 tasks creating the greatest administrative burden for your team
- Created basic process documentation, screen recordings, examples, or reference notes for those tasks
- Prepared access to your agency management system, email, communication platforms, carrier portals, and other required technology
- Defined clear 30, 60, and 90-day success metrics
- Briefed your internal team on the VA's role, initial responsibilities, and primary point of contact

This preparation helps remove friction and allows your VA to focus immediately on learning how your organization operates.



Weeks 1-2: *Establishing the foundation*

During the first two weeks, your VA will become familiar with your systems, workflows, communication preferences, and quality standards.

You can expect:

- Daily check-ins to review priorities, answer questions, and provide timely feedback
- Initial focus on one clearly defined task type until your standards are consistently met
- Two to three routine task types delegated by the end of the second week
- A formal two-week performance review to assess quality, communication, and progress
- Adjustments to workflows, documentation, or training based on early feedback

By the end of this phase, your VA should be handling meaningful work independently and beginning to relieve pressure on at least one member of your team.

Weeks 3-6: *Building capacity and ownership*

Once the initial foundation is established, your VA's responsibilities will begin to expand.

During this period, you can expect:

▶ Five to seven task types successfully delegated

▶ Check-ins reduced from daily meetings to every other day or several times per week

▶ Initial process improvements identified and implemented

▶ Routine client-facing or carrier-facing responsibilities introduced where appropriate

▶ Greater ownership of complete workflows rather than individual tasks

▶ A six-week milestone review confirming progress toward 60 to 70% independence across targeted responsibilities

This is where operational impact becomes increasingly visible. Account managers and other experienced team members can also begin redirecting more of their time toward client relationships, renewals, business development, and higher-value work.

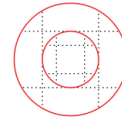
Weeks 7-12: *Optimizing performance and measuring results*

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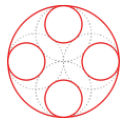
During this period, you can expect:



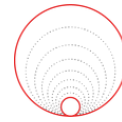
**Time savings and ROI
calculated and documented**



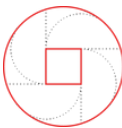
**More advanced responsibilities
assigned as trust and
proficiency increase**



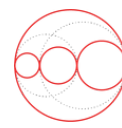
**Cross-training initiated across
related functions, workflows,
or lines of business**



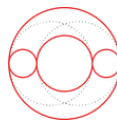
**Process improvements and
efficiency gains documented
for future use**



**A comprehensive 90-day
review conducted with
performance metrics**



**An assessment of whether
additional support, including a
second VA, may be beneficial**



**A long-term development plan
established for continued
development**

By the end of 90 days, your VA should be operating as an integrated member of the team, contributing to smoother workflows, stronger capacity, and more scalable operations.

The outcome: *More capacity for growth*

Over the first 90 days, a Patra VA can progress from handling routine tasks to owning workflows, improving processes, and supporting more strategic work.

That shift gives your team fewer backlogs, more consistent policy servicing, faster response times, and more room to focus on the work that directly supports retention and new business.

The value of a VA isn't just added support. It's also in the creation of a more efficient operating model: one that helps your organization use its people, time, and expertise more effectively, building a stronger foundation for profitable growth.



Ready to get started with your
Virtual Assistant?

SCHEDULE A CONSULTATION WITH PATRA TODAY



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

 (415) 884-8008

 info@patracorp.com

 www.patracorp.com