



PATRA™

CASE STUDY



AssuredPartners

Streamlined eligibility processing enabled better focus on strategic tasks and client relationships

AT A GLANCE

CLIENT PROFILE

- Retail
- 11th Largest Broker in US
- \$2B Annual Revenue
- Business Insurance, Risk Management, Employee Benefits, Personal Lines, and Private Client

CHALLENGES

- Inconsistent processes across multiple offices due to M&A
- AMs buried in non-client-facing activities

REQUIREMENTS

- Insurance Expertise
- Standardized Consultative Methodology for Onboarding & Ongoing Efficiency
- Licensed, US-based Account Management

PATRA SOLUTION

- Eligibility Management

POSITIVE OUTCOMES

- Improved Operational Efficiency
- Process Centralization & Consistency
- Improved CSAT
- More Time for Strategic Client Initiatives

CHALLENGE

AssuredPartners brought together multiple agencies in the Chicagoland area. To streamline operations and free up their account management teams for strategic tasks, AssuredPartners sought to outsource eligibility processing for their clients. They needed a reliable partner to handle this crucial aspect of their business.

BENEFIT

During their search for a suitable partner, AssuredPartners considered various options. Ultimately, Patra stood out for several reasons. The team at Patra demonstrated in-depth knowledge of eligibility and employee benefits, making them a trusted choice. Their expertise and commitment to excellence provided the assurance that AssuredPartners needed in order to confidently move forward with the partnership.

OUTCOME

Since implementing Patra's services, AssuredPartners has experienced positive outcomes. With the burden of eligibility processing now handled by Patra, AssuredPartners' account management teams have more time to focus on strategic client initiatives. This has improved overall efficiency and allowed for better client service. Additionally, the seamless integration of Patra's services into AssuredPartners' operations has resulted in a smooth transition and successful collaboration between both parties.

CONCLUSION

AssuredPartners' decision to partner with Patra for their eligibility processing needs has proven to be a wise choice. By entrusting this critical aspect of their business to Patra, AssuredPartners has gained more time and resources to dedicate to their clients' strategic objectives. The successful implementation and ongoing collaboration between the two organizations have contributed to improved efficiency and client satisfaction.