



## Bolton uses Patra OnDemand & Select to sustain growth & enhance value

Bolton & Company is a leading independent insurance broker serving the needs of thousands of clients across the country. Founded in 1931, Bolton continues to grow with the industries, organizations and communities they serve every day. Their success is dependent upon fostering an innovative environment where a team of professionals can grow, develop and thrive in their roles to best support clients.

Bolton is focused on sustained and strategic growth. As the organization evolves, their focus is to ensure that the business scales effectively to support the needs of their clientele. Bolton serves a wide range of clients from a vast field of industries so there is constant activity throughout the year related to service, accounts, deadlines and filings. As Bolton's client base grows, the organization is committed to delivering high-touch service that helps drive these businesses forward. In order to do this, Bolton must keep process efficiency at the front of their operational objectives.

Several years ago, Bolton found itself in a position where the sophistication and degree of service they were providing was evolving faster than many of the internal processes that support the business. Like most offices, Bolton found themselves deep in paper processes and other labor intensive situations that were taking up valuable energy and resources. They needed a solution that could eliminate or ease some very time consuming non-client facing processes. Their solution was partnering with Patra.

### Solution at a Glance

#### Challenge

As their business grew, proper staffing was needed to keep up with time consuming processes.

#### Solution

Roll out Patra OnDemand & Select, delivering processing services, refine workflows and workload that is scalable as they continue to grow.

#### Result

Allowed increased internal productivity and capacity and ability to place their focus on customer-facing activities.



***As Bolton & Company grows, we continue to rely on Patra as a business resource and partner that we depend on. Thanks to the support we receive from Patra, we have been able to eliminate redundant processes, increase our efficiencies and sharpen our focus toward being the ultimate resource for our clients.***

**Steve Brockmeyer, ARM, CIC**  
President & CEO, Bolton & Co.



## **A Successful Partnership**

Bolton's partnership with Patra placed their focus where it really counts—serving clients directly and providing high-touch service. Patra has delivered processing services, refined workflows and workload in a way that is sustainable and scalable. They have increased internal productivity and capacity and eliminated a lot of unnecessary work in the process. As the relationship has grown, Bolton entrusts Patra with increasing administrative functions including policy servicing, certificate services, and support services across both the Commercial Lines and Employee Benefits lines of business.

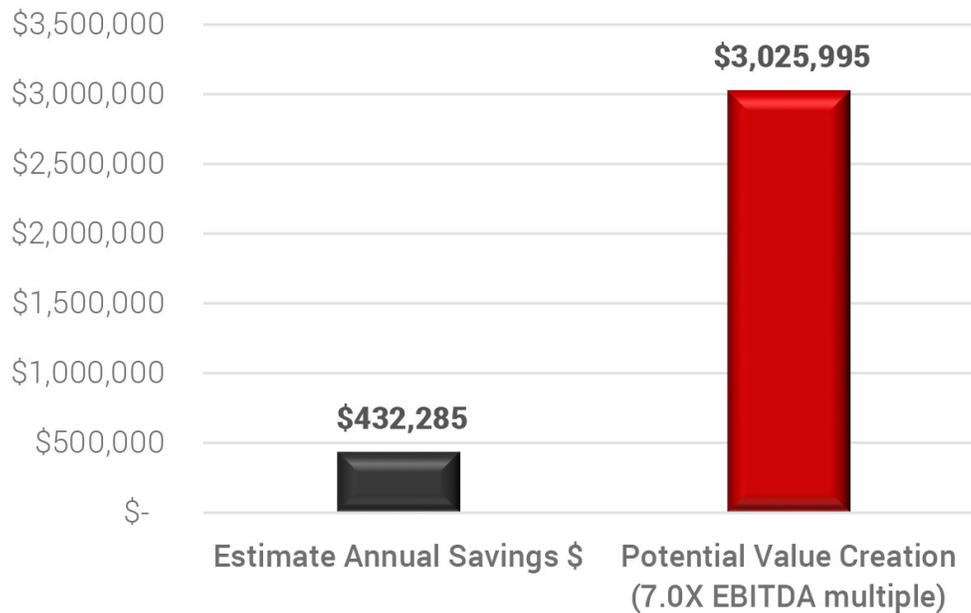
Mike Morey, Bolton's Chief Operating Officer noted that the broker was an early adopter of Patra's initial services. He stated, "what I appreciate about Patra is that they are our partner and want to understand where and how they can help us grow our organization. We sit down and strategize together on what we're seeing and from those conversations new ideas and solutions are born."

## Achieving Desired Results

The Patra OnDemand and Patra Select partnership has allowed Bolton to realize meaningful results. Over the last three years, and as the relationship strengthened, Bolton increased their certificate issuance through Patra by 25% while Patra maintained accuracy rates of 99.6%. During that same time period, the volume of direct bill transactions increased by 29% while Patra realized an accuracy rate of 99.9%.

During the most recent fiscal year, Bolton saved approximately \$432,000 in expenses by leveraging various Patra services. As these expense reductions are realized year to year, Bolton not only creates future investment capital but they also enhance the overall value of Bolton itself as illustrated below.

### Financial Impact of Patra Utilization



#### Company Profile

Leading independent insurance broker.

#### Client Since

2015

#### About the Company

A full-service insurance broker based in California that handles the employee benefits, property and casualty and risk management needs for thousands of clients across the globe.



1107 Investment Blvd. Suite 100, El Dorado Hills, CA 95762

(415) 884-8008

[www.patracorp.com](http://www.patracorp.com)

© Patra Corporation, 2019