

Acquisition & Customer Experience

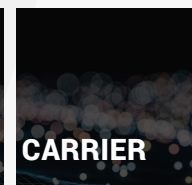
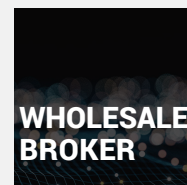
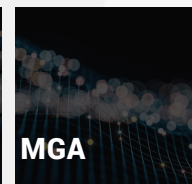
Omni-channel technology to enhance and improve customer experience

Patra Direct provides a flexible, end-to-end solution that deploys omni-channel communication tools to your existing management systems, supporting every part of the customer experience. Inbound or outbound, Patra Direct supports your customer contact centers with voice, email, text, and chat to deliver your brand experience.

Our knowledge of direct-to-consumer insurance marketing and strategy allows us to support new products, customer initiatives and special projects. Patra Direct provides highly educated, experienced insurance staff within a comprehensive metric reporting environment.

- ✔ Omni-channel communication technology
- ✔ Flexible and scalable model to manage your contact center
- ✔ More than 200 licensed agents to represent your brand
- ✔ Improve process efficiency and consistency
- ✔ Improve customer service

Markets Served



How can Patra Direct make a difference?

Patra Direct provides easy solutions to implement new contact centers, transition from existing centers or test new initiatives.

Customer Contact Center

- › Policy acquisition & premium generation
- › Multi-level customer service
- › Policy owner retention
- › Cross-sell & up-sell
- › Endorsement processing and distribution
- › Lead qualification

FNOL/Claims Support

- › First notice of loss
- › Claim data input
- › File management

Policy Owner Service

- › Payment processing for new, renewal and endorsement premiums
- › Customized payment portal development
- › Tele-underwriting

Technology

- › Chat/chatbots
- › Email
- › Click to call
- › Social media monitoring
- › Digitization at the source
- › Website analytics

Workflow Capabilities

- › Upgrade at issue
- › Cross-sell & up-sell
- › Customer service
- › Endorsement processing and distribution
- › Policy owner retention
- › Lead qualification
- › Premium processing
- › Claims support

Product Expertise

- Commercial Lines**
- › Commercial package/BOP
- › General liability
- › Workers' comp
- › Commercial property
- › Commercial auto
- › E&O
- › D&O
- › EPL
- › Excess/umbrella
- › Cyber liability
- › Surety

Personal Lines

- › Auto
- › Homeowners
- › Motorcycle
- › Renters
- › Umbrella
- › RV
- › Marine

Patra Direct at a Glance

1.5M+

Customer Contacts
Handled Each Year

\$220M+

Premium
Managed

20

Direct Writer
Customers

70,000

Policies
Managed

200+

Licensed
Agents

50

Corporately
Licensed States

PATRA[™]

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It's that simple. Get the ball rolling by reaching out to Patra business development team at sales@patracorp.com