Patra Corp Builds Scalable Processes with Intuit QuickBase

The Challenge
- Need to deliver back-office services at larger scale
- Workflows too specialized to be managed manually
- Distributed team on two continents
- Rapid deployment necessary to scale quickly
- Need visibility into services delivered

The Solution
- Intuit QuickBase as a platform for more than 400 customized apps
- Automated workflows to enable task specialization
- Ability to track employee time and hours
- Rapid deployment of new apps for new customers or requests
- Built-in reporting tools

The Results
- Workflow automation enables scalable processes
- Rapid deployment of new apps supports fast growth
- Web-based software enables access from any device, anywhere
- Time tracking delivers more efficient resource planning
- Intuitive reporting enables fast access to performance data

As a leader in back-office outsourcing to the insurance industry, Patra Corporation is constantly improving its ability to deliver to customers. To scale its business, Patra needed a solution that would enable maximum efficiency in its business processes and deliver relevant insights quickly. The organization found its answer by building a range of highly specialized apps on the Intuit QuickBase platform. The ability to build and deploy quickly while meeting specific customer needs has enabled Patra to deliver high-quality service at much greater scale than ever.
Scalability is an elusive goal for professional services providers, requiring a balance between standardized processes and customers’ individual needs. At Patra Corporation, a leader in back-office outsourcing for the insurance industry, striking that balance required the ability to create and deploy unique solutions for each customer rapidly by increasing operational efficiency.

To deliver highly customized solutions quickly, Patra needed a way to manage a multitude of unique workflows that could be developed and deployed quickly. Leveraging over 400 applications built with Intuit QuickBase, Patra is able to go from request to solution with speed and accuracy.

“QuickBase is the primary platform we run our business on,” says Matt Easterlin, VP of Global Operations at Patra Corporation. “QuickBase gives us the ability to develop on the fly and deploy rapidly. Based on the type of work we’re doing, we can build a highly customized workflow in a very short period of time.”

Delivering Process Excellence

Outsourcing services are a growth market within the insurance industry as providers look to gain a competitive edge by automating processes. As a leading provider in the space, Patra enables companies to outsource customer service functions such as issuing proof of insurance documents, quality assurance practices, accounts receivable transactions, and more.

To drive efficiency and scale, Patra implemented a system in which client requests are passed via customized workflows. Patra staff are responsible for delivering specialized tasks rather than end-to-end delivery, boosting productivity and efficiency.

Patra needed a technology system flexible enough to support unique customer needs and processes while delivering real-time insights into activity status and duration. The company selected Intuit QuickBase for its ability to deliver customized applications quickly and without the need for an internal IT infrastructure.

Now, when a customer requests assistance with a back-office process, Patra can quickly build a QuickBase app (or customize an already-existing app) to manage all the workflows associated with that process and deploy it rapidly. Patra relies on more than 400 QuickBase apps to move customer requests from request to delivery. The apps range from the extremely narrow — one customer and one function — to more broad apps for delivering standard processes to multiple customers.

“QuickBase enables us to to architect an efficient system for one process and change it easily if necessary,” says Easterlin.

Advanced Reporting for Better Resource Planning

Not only does Patra’s system support rapid deployment of workflows, but it also offers real-time reporting. This allows Patra leaders to analyze key process metrics and better plan for the future.

“Because of QuickBase, we have a lot of visibility into what we’re doing. We know how our people are spending their time,” says Easterlin. “We can report, in real time, how we’re doing against service level agreements.”

Because the report builder is intuitive, Patra employees can quickly create their own reports rather than requesting them from IT. And because QuickBase is delivered via the web, Patra’s distributed team can access the right data no matter where they are.

“We have physical locations in the US and India, and our US employees travel frequently. The fact that we can access QuickBase from different places, and from any device, is great.”

Speed, flexibility, and real-time data are critical to scaling any company. For Patra, deploying quickly and maintaining top-tier service levels are a foundation for growth.