



## Introduction

Patton Compliance provides insurance licensing and compliance consulting services to third party administrators (TPAs), employee benefit plan administrators, insurance companies, adjusters and adjusting firms, insurance producers and insurance agencies.

## Streamlining License Management

For many years, Patton Compliance was able to handle its licensing renewals manually using Microsoft Excel spreadsheets. But the number of items grew and grew, until suddenly staff members were struggling to keep track of between 100 and 125 separate filings each year. They searched for a fully automated, cloud-based solution to this business problem, and found RenewalTracker.

“One of the features that made RenewalTracker stand out is the ability to create a recurring filing,” said Patton Compliance President Madeline Bardolf. “Once a license has been renewed at the end of the year, we simply click a button to mark it as recurring and get notified long before it’s up for renewal next time. We couldn’t do this in Excel, which created more work.”

RenewalTracker provides consistency and standardization to Patton Compliance’s license compliance management process for their customers by providing instant access to key license information and advanced notification well in advance of filing deadlines.

*“RenewalTracker does everything we need it to do, and one time even saved us from missing a filing.”*

**Madeline Bardolf**  
 President  
 Patton Compliance

### RenewalTracker License Management Workflow





## Process Automation

Before deploying RenewalTracker, a staff member had to download an Excel spreadsheet from one of Patton Compliance's secure servers. They'd then review the items therein, take the necessary action (such as noting the state authority that a renewal was submitted to), and then upload the document back to the server. Now, they simply log in to the secure RenewalTracker platform, see which items need attending to, and the system saves the updated items list. Rather than having to look at each filing and see when it's due, RenewalTracker alerts the appropriate Patton Compliance team member well in advance, reducing the chance of a filing being overdue.

"We manage insurance licensing and compliance for various insurance companies in 50 states, which made it hard to manually track where every single filing was in its annual renewal process," Bardolf said. "The automation provided by RenewalTracker makes it much easier to keep track of both one-off and recurring filings for all our clients, no matter where they're located and what type of renewal it is. The process is so much easier now."

## Customer Service

The success of any software implementation doesn't just rest on the stability of the system or the competence of the people managing it on the customer side. It's also dependent on the vendor. At Patton Compliance, the combination of a feature-rich tool and a responsive partnership has led to a project that exceeded expectations.

"The RenewalTracker team are team are genuinely nice people who treat their customers well, and that means a lot to me," Bardolf said. "If I ever have a question, I get a quick and helpful reply. They're just great to work with."

When asked if she would recommend RenewalTracker to a peer or colleague at another company, Bardolf replied with an enthusiastic, "Yes."

"Our clients rely on us to handle their insurance and compliance needs, so we cannot afford to make mistakes," she continued. "RenewalTracker assists us in our mission to provide the best service possible. It does everything we need it to do, and one time even saved us from missing a filing."

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## Never miss a renewal again.

RenewalTracker manages recurring renewals with automatic reminder notifications, saving time and effort by organizing and standardizing your process to ensure all commitments and regulations are met.

