



TREENO
SOFTWARE

Treeno Enterprise Document Management for Insurance

Insurance brokers and agencies need an easy-to-use yet powerful enterprise document management system that enables them to access, manage, and share critical documents across a broad range of functions, departments and locations. It's more than a competitive advantage—it's a requirement.

A typical agency processes thousands physical documents each year including policy applications, coverage confirmation letters, renewal notices, policy terms, dec pages and claims documentation. Plus, virtually every state government mandates that all insurance transaction records be maintained for up to seven years, while archives need to be kept for offers of additional coverage for long periods to guard against E&O liability.

Discover the Power of Treeno Enterprise Document Management (EDM)

Treeno EDM is an easy-to-use and extremely powerful integrated content, document and workflow management system that enables insurance organizations like yours to capture, organize and share any type of digital or paper-based document within a secure, central repository. System deployment is effortless, document retrieval is instant, integration with existing applications is seamless and the Treeno system can scale to support as few or as many users as your organization requires.

Treeno empowers your insurance organization to improve client satisfaction through streamlined operations, improved efficiency, reduced costs and simplified audit preparation.

Transform Your Organization

Deploying and operating a document management system should be as simple and effortless as using familiar business applications. Treeno EDM integrates with legacy systems such as core accounting and CRM solutions, delivering a single point of access to information and workflow across your insurance business.



"The true power of the Treeno system is in its ability to centralize all of our most critical documents within a single, secure, easy-to-access repository. Since we deployed Treeno EDM, we've reduced our annual document retrieval and filing time by over twenty-four hundred person hours which represents a \$3,000 to \$5,000 per month cost savings. This new found time is spent servicing our valued customers."

*Kathy Batchelder
Operations Manager
Clark-Mortenson Agency*

Clark-Mortenson Agency is one of the largest independently owned insurance and financial services agencies in New England

To learn more about Treeno, call us today at 1-800-528-5005, email info@treenosoftware.com, or visit us at www.treenosoftware.com.

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COMMAND YOUR CONTENT

Simplify Regulatory Compliance

Reduce your audit preparation process from weeks of tedious work down to hours using Treno. Insurance organizations like yours are under constant pressure when it comes to staying current with regulatory compliance issues. The first step towards ensuring compliance with security requirements such as HIPAA, is taking command of your content.

Treno EDM simplifies the regulatory compliance and audit preparation process for by storing, capturing, organizing and sharing necessary and appropriate documents in a centralized, secure repository, while automated business process automation capabilities streamline information access, tracking and reporting.

Ensure Document Integrity and Security

The ability to track and control sensitive information using a centralized repository and clear audit trail is paramount for financial services organizations. Treno EDM includes comprehensive audit trail capabilities, including task date and time stamp, task originator, task description and related document activities.

With Treno you can eliminate the possibility that documents stored in your EDM system will be altered without detection, ensuring undisputed authenticity of records. And, integrated notification capabilities can inform management when relevant content within the repository is updated.

Disaster recovery is also greatly improved, as items previously managed via fax, mail, and other paper means are now stored in the Treno repository. With Treno EDM, documents of all types can be backed up in a secure fashion and are protected from theft, accidental loss, or destruction.

Real Insurance Companies Rely on Treno to:

- Ensure regulatory compliance and reduce audit preparation time
- Secure and protect sensitive information and customer confidentiality
- Improve internal productivity and strengthen member service
- Reduce operating costs (storage, retrieval, photocopying, and administration)
- Enable productivity tracking and accountability, ensuring turnaround requirements are always met
- Streamline integration with existing management systems
- Exchange data rapidly with all departments
- Simplify enterprise wide access to critical documents
- Reduce demand for physical storage space
- Ease the burden of regulatory compliance
- Increase sales and improve customer service quality



About Treno Software

Established in 2002, Treno Software is a leader in the Enterprise Document Management (EDM) industry. Treno Software was one of the industry's first to embrace cloud computing with the Treno EDM Cloud (SaaS) and to provide web-based solutions offering secure global mobile access. Treno Software's mission is to provide their customers with operational workflow efficiencies and measureable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web-based Enterprise Document Management (EDM) Software Solution.

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