

Clark-Mortenson Agency

Clark-Mortenson Agency, one of New England's largest independently owned insurance and financial service firms leverages Treeno's Global Content Management system to simplify document storage/retrieval and improve customer service.

"Every office, every department and every person at Clark-Mortenson uses TreenoGCM, including customer service, human resources, accounting, sales, and IT,"

Dee Belanger, accounting manager, Clark-Mortenson Agency.



Company

Clark-Mortenson Agency
102 Main St.
Keene, NH 03431
603.352.2121
www.clarkmortenson.com

Industry

Insurance

Service Area

New Hampshire, Vermont, and Massachusetts

Operational Impact

Delivered instant enterprise-wide information access — Documents are retrieved, sorted, and filed in seconds and never get lost.

Mail and call center centralization — Clark-Mortenson has centralized its physical mail delivery and customer service center using Treeno. Remote employees, regardless of location can now access critical files in real time.

Irrefutable document integrity — Clark-Mortenson can virtually eliminate any possibility that documents stored in their system can be altered without detection, ensuring undisputed authenticity of records.

Reduced costs — Annual retrieval and filing time was reduced by over twenty four-hundred person hours which represents a \$3,000 - \$5,000 per month cost savings.

Differentiated service offering — Customer service representatives can now send electronic files to clients via email versus fax or standard mail.

Reduced demand for physical space — All paper files are stored electronically in a secure, central repository and on removable disks.

Simplified regulatory compliance — Clark-Mortenson has reduced their audit preparation process (i.e., HIPPA) from weeks of tedious work down to just hours.

Improved transactional filing — Clark-Mortenson now has a much more efficient alternative to their previous manual process of recording dates when documents were received in their database.

TreenoGCM™ benefits:

- ▶ Instantly and easily finds any document
- ▶ Makes content centrally available to all – anytime and from anyplace
- ▶ Allows familiar workflow processes to remain intact – *we work the way you work*
- ▶ Keeps sensitive documents secure; available only with assigned access rights
- ▶ Automates document tracking and auditing
- ▶ Simplifies records management
- ▶ Prevents lost records
- ▶ Saves storage space



The Client

Founded in 1877, the Clark-Mortenson Agency is one of the largest independently owned insurance and financial services agencies in Northern New England with eight locations. The bulk of its clients are based in New Hampshire, Vermont and Massachusetts. Business account specialties include commercial property, general liability, worker's compensation, Benefits Plus worksite market program, bonds and employee benefits.

The Challenge

As Clark-Mortenson expanded its offices and operations from its Keene, New Hampshire hub, it faced an efficiency problem. "As we expanded our agency, we needed a method that would allow our enterprise-wide employees to locate and manage specific files in real-time," says Dee Belanger, accounting manager at Clark-Mortenson Agency. "We needed to avoid the time sink of having our employees physically call from one office to another just to locate documents."


Clark-Mortenson aspired to live on the technological cutting edge and to be a top performing agency in the insurance field. The company planned to achieve that goal by offering the highest quality service through a committed, professional, and efficiently operated staff. But before that goal could be realized, solving the myriad of logistical issues was a must. "We used to spend a tremendous amount of time filing and managing paper documents," says Belanger. "And, the lack of a central information repository and enterprise-wide access to that information was hindering our employee's ability to effectively service our valued clients."

With both paper and electronic documents scattered throughout eight offices, sometimes just finding a document was a challenge. "In many instances, we needed to search for documents in multiple locations," Belanger says. "And when a client called in, we would tell them that we needed to call them back with the information. The entire process was a challenge to our operational efficiency and it was costing our company money."

"Our primary criterion for choosing a system was that it had to be easy-to-use, fast-to-learn, and it needed to integrate with our current mainstay applications with little disruption to our employees."

Dee Belanger, accounting manager, Clark-Mortenson Agency.

What Clark-Mortenson needed was to implement an electronic content and document management system that would allow registered users to quickly locate and share timely information regardless of their geographic location. But they were unsure where to begin. "We looked at a wide variety of document and image management systems but they all forced us to change our existing workflow process which would be disruptive and expensive," says Belanger. "Our primary criterion for choosing a system was that it had to be easy-to-use, fast-to-learn, and it needed to integrate with our current mainstay applications with little disruption to our employees."



At any given time, between 1.5 and 7.0 percent of an organization's files are lost or misplaced. On average this is 1 in every 20 documents.

(Source: Survey conducted by Arma International)

The Solution

Clark-Mortenson chose Treeno, a Portsmouth, New Hampshire-based software company specializing in business process management solutions. TreenoGCM is an easy-to-use yet extremely powerful global content management system that empowers insurance companies of all types and sizes to improve their operational efficiency by capturing, organizing and sharing 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 global enterprise users as your organization requires.

Belanger and staff at Clark-Mortenson were intrigued by the Treeno solution because it could easily adapt to the ways in which the company's employees were already doing their jobs. Unlike many other content/document management solutions, TreenoGCM integrated with current administration, audit and compliance environments. It also integrated with the agency's existing business software including Sagitta Agency Management System. "Treeno fit our needs the best," says Belanger. "The biggest reason was the ease-of-use and lack of disruption for the end user."

Implementing TreenoGCM at Clark-Mortenson did not require a re-engineering of business process, resources, workflow or infrastructure. "We scan the documents in the central reception department," says Belanger. "The scanners are next to the phone system so when our receptionists have some down time, they scan all the documents. We print our own bar code for each client and that bar code goes onto every scanned document, making the retrieval process a snap."

While the scanning process is easy and fits into Clark-Mortenson's workflow, quick document retrieval has proven to be the biggest cost savings and efficiency benefit. According to Belanger, the agency receives 600 to 800 client phone calls in an average day that require them to gain access to various types of information. By centralizing document storage on the Treeno system, any employee in any office can retrieve and manage documents. "Every office, every department and every person at Clark-Mortenson uses TreenoGCM, including customer service, human resources, accounting, sales, and IT," Belanger says.

Centralizing document storage means that the agency operates as one virtual company rather than a string of remote offices with individual filing systems. Since deploying the Treeno system, Clark-Mortenson Agency has recognized a dramatic increase in operational efficiency and cost savings.

The Outcome

The benefits of implementing electronic content/document management have exceeded the agency's expectations. "We serve our customers much quicker and provide them with higher quality service due to our use of the Treeno system," says Belanger. "It's just a click of a mouse to move from a client file to each needed document and the enterprise-wide efficiencies that we've gained are enormous."

Since implementing TreenoGCM, the New England insurance company has reduced its annual document retrieval and filing time by over twenty four-hundred person



It takes between 2-10 minutes to find one missing document and costs up to \$150, depending on time lost. It costs up to \$250 to recreate the lost document.

(Source: Information week)

hours which represents a \$3,000-\$5,000 per month cost savings. This new found time has enabled Clark-Mortenson employees to concentrate on what they do best—servicing customers. “We no longer focus on paper and where it goes, but instead on our clients specific needs.” According to Belanger, customer service representatives now offer to send electronic documents to clients via email. “This new feature has become a key differentiator for us and has been well received by our customers,” says Belanger.

Belanger says that people throughout Clark-Mortenson credit the TreenoGCM system as an integral part of meeting the company’s strategic goals. “I’ve been very happy, but the true test was with our own salespeople,” she says. The implementation passed the “hard-to-please” salesperson test with flying colors.

“Treeno worked with us each step of the way, and personalized the system to meet our specific needs,” says Belanger. “Over the years we’ve instituted several technological advancements in our agency to support our mission of being our client’s trusted advisor and hands down, the Treeno system was the easiest to institute. Training time takes less than a half-hour, system usage is simple and Treeno’s support staff is world-class.”

“Training time takes less than a half-hour, system usage is simple and Treeno’s support staff is world-class.”

Dee Belanger, accounting manager, Clark-Mortenson Agency.

Insurance agencies and brokers rely on TreenoGCM to:

- ▶ Simplify enterprise wide access to critical documents.
- ▶ Improve operational efficiency with minimal disruption.
- ▶ Track document task date/time stamp, task originator, task description.
- ▶ Reduce demand for physical space.
- ▶ Ease the burden of regulatory compliance.
- ▶ Improve information security.
- ▶ Increase sales and improve customer service quality.

Insurance agencies and brokers around the world are increasing productivity and improving customer service quality with TreenoGCM. To learn more about how Treeno can help your organization, call us at **1-800-528-5005** (U.S. & Canada), **1-603-570-4317** (outside of U.S. and Canada) or visit us on the Web at **www.treenosoftware.com**

