

Global Content Management *Made Easy* for Insurance Brokers and Agencies

Insurance brokers and agencies need an easy-to-use yet powerful 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 mandate for survival.

A typical agency processes over 30,000 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. The majority of this information is handled and stored through inefficient, manual processes due to the notion that an automated system is costly, disruptive to existing workflow processes, and difficult to use.

Introducing TreenoGCM™

TreenoGCM is an easy-to-use and extremely powerful, integrated document, content and workflow management system that enables insurance brokers and agencies to easily 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 line of business applications is seamless, and the Treeno system can scale to support as few or as many users as your agency requires.

Treeno empowers your agency to reduce costs, simplify compliance and enhance overall client satisfaction through streamlined operations and improved efficiency.

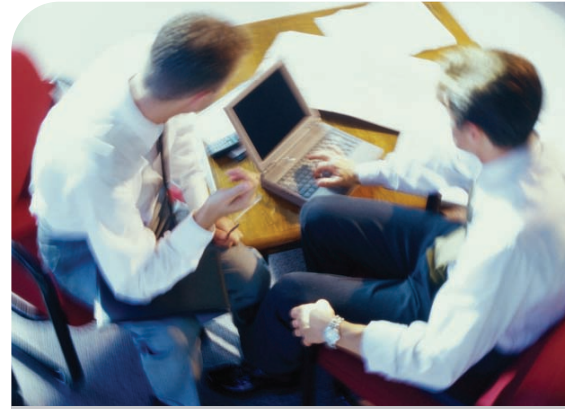
Transform your organization without disruption

Deploying and operating a content management system should be as simple and effortless as using familiar applications while existing workflow processes remain intact. TreenoGCM's powerful and robust feature set, in conjunction with integrated collaboration and process management capabilities will enable your agency to improve operational efficiency and productivity without changing the way your employees do business.

Simplify regulatory compliance

Reduce the audit preparation process from weeks of tedious work down to hours using Treeno's powerful system.

Insurance brokers/agencies are constantly under the gun when it comes to staying current with regulatory compliance processes. Though requirements and procedures vary by country and audit type, the first steps towards ensuring compliance with the myriad of regulations governing the insurance industry including HIPAA (Health



The unmatched power of TreenoGCM:

- ▶ Instantly and easily finds any document
- ▶ Makes content centrally available to all – *anytime and from anywhere*
- ▶ 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
- ▶ Eliminates lost records
- ▶ Saves storage space
- ▶ Simplifies compliance

Insurance Portability and Accountability Act), are control and visibility. The demand is for a system that will integrate with existing business processes for tracking and managing digital and paper-based content across all enterprise wide systems—in real-time.

TreenoGCM simplifies the regulatory compliance process for Insurance brokers/agencies by capturing, organizing, and sharing necessary and appropriate documents in a centralized, secure repository, while automated business process management capabilities streamline information access and reporting.

Ensure document integrity and security

The ability to track and control customer sensitive information is absolutely paramount for insurance brokers and agencies. TreenoGCM stores all of your information in a highly secure repository and includes comprehensive audit trail capabilities such as task date/time stamp, task originator/description, and related document activities such as who worked on/reviewed the document. Treeno customers can virtually eliminate any possibility that documents stored in their system will be altered without detection, ensuring undisputed authenticity of records. And, integrated notification capabilities inform users 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 Treeno repository. With TreenoGCM, documents of all types can be backed up in a secure fashion and are protected from theft, accidental loss, or destruction.

Insurance organizations rely on TreenoGCM to:

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

Insurance brokers and agencies around the world are enhancing customer service quality and improving productivity 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



"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," said Kathy Batchelder, operations manager for Clark-Mortenson Agency. "Since we deployed TreenoGCM, 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."

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



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