etfile

Premier Insurance Provider Saves Over $10,000 Per Year with etfile

Organization:
Trimble Insurance Agency, one of the leading insurance agencies servicing Ohio providing personal and commercial insurance, financial services, employee benefits, farm and agribusiness, and transportation coverage.

Industry:
Insurance

Solution:
etfile Enterprise Content Management (ECM) and Automated Workflow

TRIMBLE INSURANCE
AGENCY, INC.

"etfile helped us to transition to a larger, more effective organization. We were not only able to save time, efficiency and money – but the transition positioned us well for the future."

> – *Greg Trimble, President of Trimble Insurance Agency, Inc.*

The Customer

Founded in 1946, Trimble Insurance Agency, Inc. is one of the leading agencies serving Ohio. An independent agency, the company offers a complete array of services backed by an impressive portfolio – from personal and commercial insurance to financial services and employee benefits. A full-service firm, Trimble delivers complete insurance and risk management offerings.

"One reason we're so highly regarded by customers is our focus on honest and professional service. We seek to act with speed and professionalism to every request. This means that efficient routing of information is highly critical," said Greg Trimble, President of Trimble Insurance Agency, Inc.

The Challenge

Trimble was in the throes of a dramatic expansion – nearly doubling in size. With an eye towards further growth, the company realized filing cabinets and storage were taking up much valued space. To effectively enter its next stage of growth, Trimble realized it would need to physically add onto the office footprint… Unless there was an alternative. That's when the company explored the benefits of the paperless office with etfile.

"Our filing cabinets and storage were simply taking up too much space. We were growing, but I didn't want to embark on the cost of expanding our office space. That's when I thought of going paperless," continued Trimble.

The Approach

The company began exploring a transition to a completely paperless office with the help of etfile. The etfile solution was built from the ground-up to provide a robust Enterprise Content Management (ECM) and Automated Workflow solution for any size business. More than document archiving, etfile's flagship client/server file sharing and document storage and retrieval system consistently delivered the highest levels of efficiency and productivity for global customers. The business solution is easily integrated into leading ERP and CRM systems – as well as any external client, customer, or reseller offering.

"We purchased etfile in May of 2003. Everything from the year before was taking up valuable space. Once all those documents were scanned and electronically stored, we began to implement etfile's barcode system. Using the barcode has had tremendous benefits. Everything is now barcoded while we continue to use our transactional filing workflow. This provides a measure of checks and balances for us to keep our E&O exposure to a minimum."

– Greg Trimble, President of Trimble Insurance Agency, Inc.

Trimble was particularly impressed with the ease of etfile's integration with current systems. Storage of paper and added speed of retrieving documents was an added benefit. Also crucial was the software's ability to run on a stand-alone server without taking up valuable RAM on the main server. Etfile's comprehensive training also made adoption an easy task.

The Benefits

As a result of implementing etfile, Trimble was able to eliminate 30 filing cabinets – allowing the company to add five additional workstations. Trimble recognized revenue from the sale of these old filing cabinets and projects almost $12,000 in savings each year from improved filing and increased efficiency.

Concluded Trimble: "etfile helped us to transition to a larger, more effective organization. We were not only able to save time, efficiency and money – but the transition positioned us well for the future."

About etfile

Founded in 1996, Westborough, MA-based etfile is a leading provider of custom integrated, electronic document imaging, filing and retrieval systems. At the cutting edge of content management and automated workflow technology for the paperless office, the company's flagship product offering is a modular suite of capture, distribution, process management, and integration tools. Etfile's product portfolio includes scalable client/server and cloud-based content management and automated workflow management software solutions for enterprises and small-to-medium businesses across all industries. Enabling organizations to harness the power and ease-of-use of the cloud for web-based file sharing, online collaboration, automated workflows, and advanced business analytics, etfile's strategic partnerships with the world's most innovative automation vendors ensure its solutions are in full compliance with the latest industry standards for compatibility and security. For more information, please visit us at www.etfile.com.