

Case Study



Edmond Legere Insurance Agency Leominster, Massachusetts

Situation

The Edmond Legere Insurance Agency (www.legereins.com) was founded in 1917 to serve the insurance needs of thousands of individuals, families and businesses throughout North Worcester County and nearby communities in Central Massachusetts. David Pelletier purchased the agency eight years ago and is continuing to provide property and casualty coverage to local residents and companies. As a small agency, Edmond Legere needed a way to minimize its "paper overload" to free agency staff to focus on customers rather than spending their time on clerical tasks such as managing client files, manuals, newsletters, bulletins, client insurance policies, applications, change request forms, claim reports, inspection reports, and photos.

"The bottom line is that paper was part of life, and we were overrun by years and years worth of paper," Pelletier says. "We needed a better way to manage our information."

Solution

Pelletier explored several options to reduce the amount of time and space that he and his staff dedicated to filing, retention, and retrieval, and purchased the eDrawer Document Management System in July of 2006. As a result, he says that the agency's employees are no longer spending time searching for client files and have also eliminated stacks of files on their desk. "Information is also easily passed between eDrawer and other applications," says Pelletier. "It is the ideal way for employees to quickly store or retrieve the documents they need to provide excellent customer service."

Results

Because of legal regulations, Edmond Legere needs to retain many of its files for up to seven years. So far the agency has digitized all its oldest files, and Pelletier says that the amount of paper in the office has been drastically reduced. "We started with the oldest papers, which we stored in eight filing cabinets in our basement and upstairs. When that is completed, our intention is to store all active files –from the last two years – using eDrawer. When the process is completed we'll be totally paperless."

With the "Paperless Office" they know their files are safer than before, They backup daily to removable hard drives that are rotated daily are taken offsite nightly for their business continuity plan. They have scanned their backfiles in and set retention dates to them through the eDrawer system, so they no longer need to spend time reviewing documents for timely destruction, saving staff many hours a week.

"It's really proving to be a good solution. Who knows what will happen with all of the empty filing cabinets? Maybe we can sell them on eBay," Pelletier says.

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