

# 4 Steps to Automate Outgoing Mail and Go Digital

*The top technology and  
trends to improve your  
mail workflow without  
disrupting your organization*



# A Productive Mail Workflow Is Critical to Any Company

The way businesses process mail is changing and advancing, opening up new and valuable opportunities for companies that are able to evolve and automate! The modern mail workflow can help businesses boost their productivity, cut their postage and mailing costs, and improve their customer experience with multi-channel delivery.

In this eBook we lay out 4 steps to begin your organization's digital transformation and start automating your mail process.

**These are four simple actions to help you improve your mail workflow and “go digital” with minimal disruption to your organization.**



“43% of mail managers  
want to cut down on costs  
and speed up production”

—Data from the Association for Information  
and Image Management



“Over 68% of businesses surveyed said their organization has saved money and improved process efficiency by digitizing core activities.”

—Keypoint Intelligence InfoTrends, Mail Technology & E-Delivery Adoption (July, 2018)

# STEP 1

## Assess your current outgoing mail process

In order to grow and better meet customer needs, it is essential to audit your mailing process step by step. We've outlined a checklist, in four key areas, to help steer your evaluation process and identify your company's strengths and weaknesses.

### Do any of the following scenarios sound familiar?

#### a. PRODUCTIVITY

An efficient mail workflow starts with being able to meet the needs of the business and your customers. Get an understanding of which processes are manual and repetitive in your workflow.

- ✓ Do you have a dedicated mailroom staff or do you rely on employees to pitch in and prepare mail in addition to their core role during peak periods?
- ✓ Are your employees manually sorting documents, pulling exceptions, or double-, triple-checking that envelopes have the right materials?
- ✓ Do you experience delays in sending out mail on time?
- ✓ Do you have remote employees or locations that need to prepare their documents independently vs. a centralized location?
- ✓ Are you using any mailing system hardware and/or document management software to help automate mail preparation?



“In a typical low-performing organization more than **75%** of each core back-office process is a manual process”

—Data from the Association for Information and Image Management

## b. COST SAVINGS

In addition to monitoring how customer communication workflows impact business operations and productivity, it is also important to know how it affects your business's bottom line.

- ✓ Are you paying full price for postage?
- ✓ Do you have IT staff and equipment supporting your automated mailing solution?
- ✓ Are you spending money for overtime hours?
- ✓ Are you using pre-sort software to qualify for postal discounts?

## c. SECURITY

Getting sensitive customer documents to the right recipient is essential for any company that handles personal information, consumers now expect organization to keep their personal information and communications secure at all times.

- ✓ Are you preparing and mailing sensitive customer information? (This can be invoices, statements, legal notices, EOBs or more.)
- ✓ Do you have to comply with industry or federal regulations such as HIPAA or PHI?
- ✓ Currently are there systems in place that guarantee your customer information is safe and compliant during the mail preparation process?
- ✓ Is the data secure locally or online in cloud technology? Is it susceptible to hacks?
- ✓ Are you using address validation software that ensures that customer data is accurate?



Consumers now expect organization to keep their personal information and communications secure at all times.

#### d. CUSTOMER SATISFACTION

An effective mail preparation process and delivery workflow results in happy customers that stay with your company and influence others to work with you as well. Mail is one of the main ways that companies interact with their customers on a regular basis. You want to be sure that you are making the most of this opportunity to connect with your customers.

- ✓ Can customers choose how they receive their mail? (email, text, fax or print)
- ✓ Are you customizing communications based on your customer profile or buying habits?
- ✓ Does your customer communication include personalized or targeted messaging?
- ✓ Are communications ever late or returned to you because of poor address quality?



## STEP 2

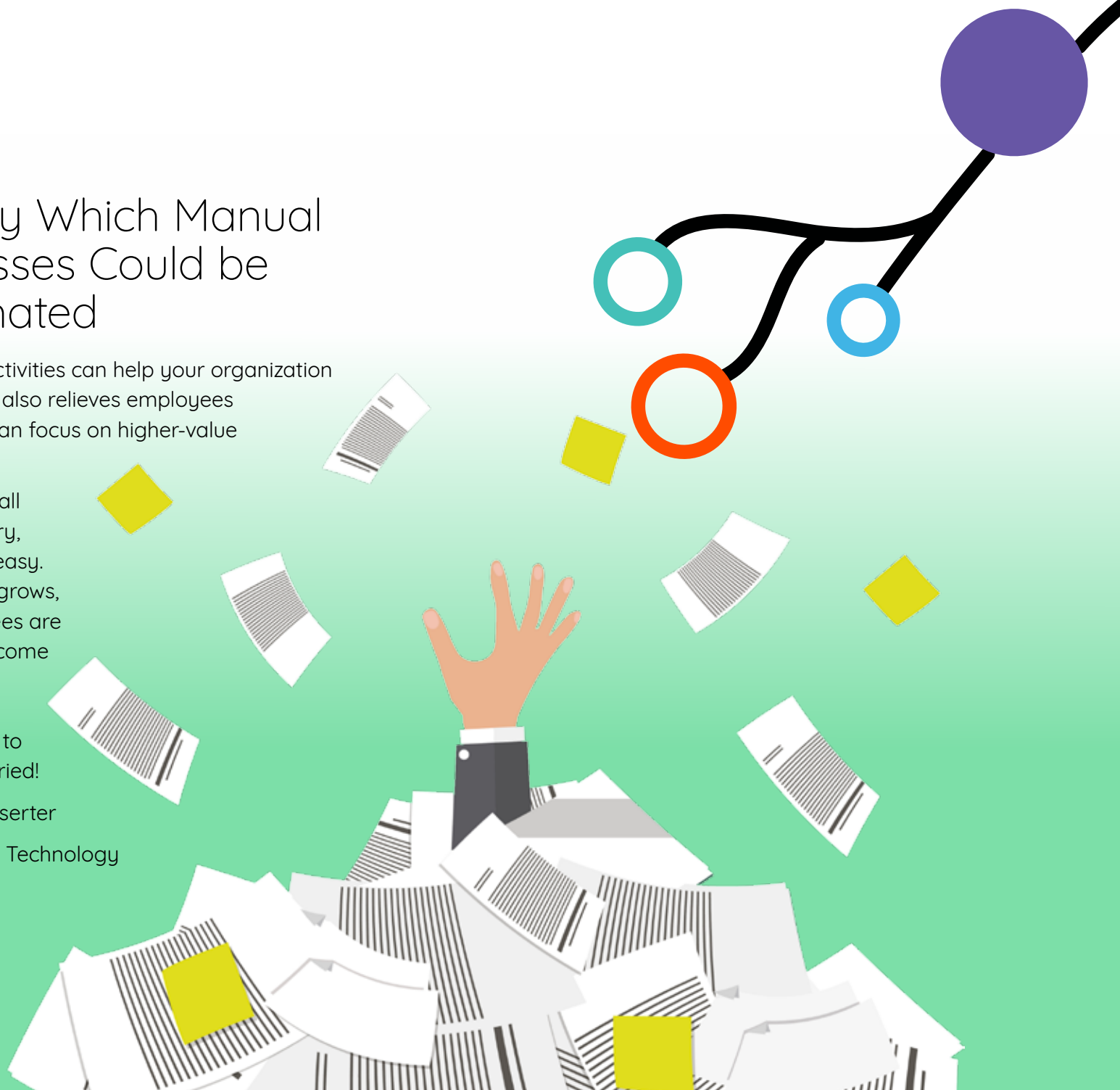
# Identify Which Manual Processes Could be Automated

Automating tedious manual activities can help your organization gain speed and scale easily. It also relieves employees from repetitive tasks so they can focus on higher-value responsibilities.

When you are preparing a small batch of documents for delivery, the process seems quick and easy. However, when your business grows, has a busy period, or employees are absent, the job can quickly become overwhelming and potentially error-prone. Here are two ways your business can begin to automate and stop getting buried!

**Automation stage 1:** Folder Inserter

**Automation stage 2:** Barcode Technology





## Automation Stage 1: The Folder Inserter

What could your favorite administrative assistant be doing if he or she wasn't folding, stuffing and sealing envelopes? A folder inserter is a great alternative to manual production. This valuable piece of equipment not only frees up employee time but it also cuts down on manual errors and delays while completing jobs in record time.

“In the past, it would take five volunteers two full days to prepare direct mail to go to 4,500 donors. Now we can prepare mail in under an hour.”

—Irene Timmons, Head of Fundraising,  
Make-a-Wish Foundation





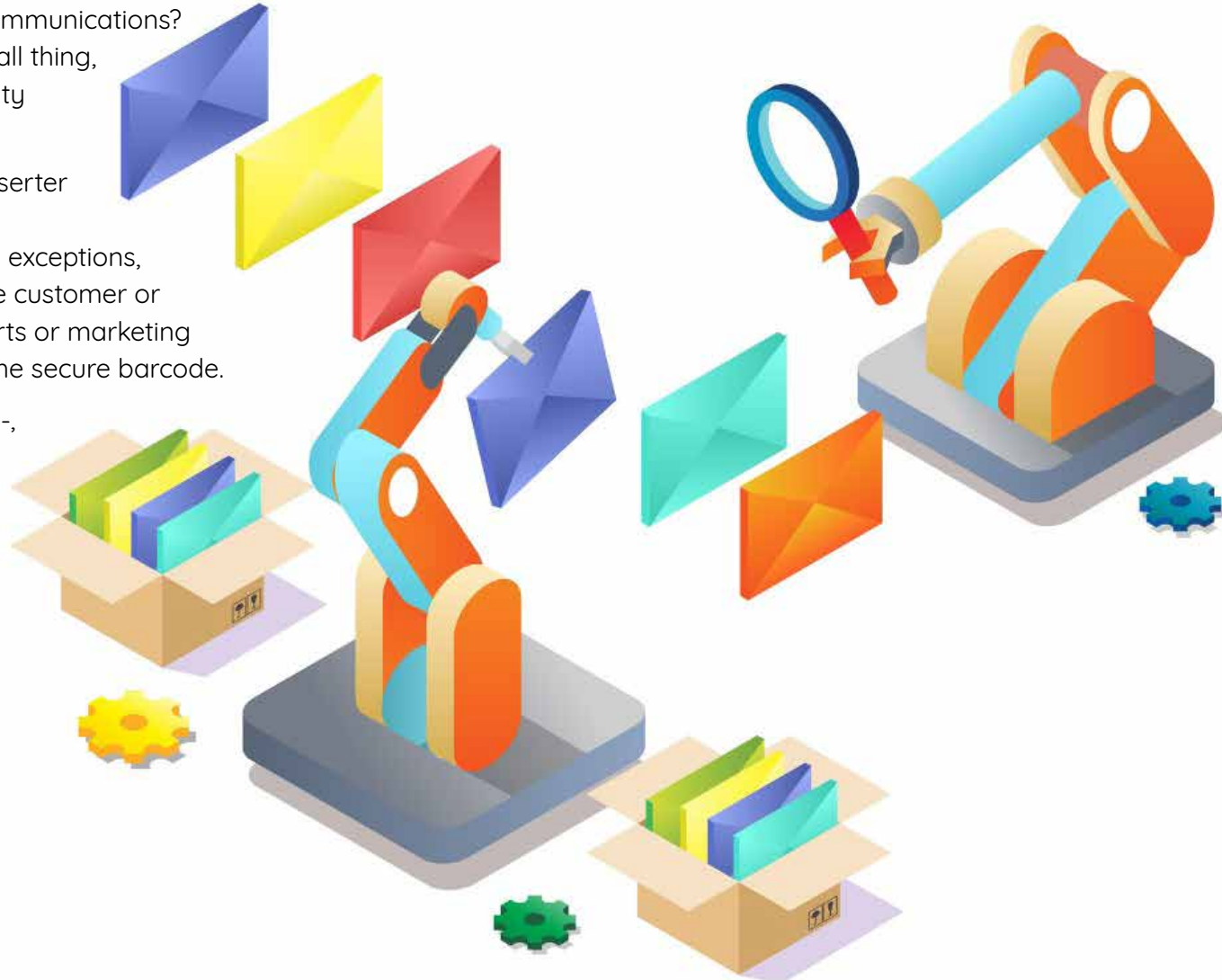
## Automation Stage 2: Barcoding Technology

You may also choose to add “intelligence” to your folder inserter with document management software that places barcodes on your documents.

Why would I ever barcode my customer communications? That’s a great question. It sounds like a small thing, but this simple change increases productivity and could save you money.

Barcodes act as identifiers for the folder inserter delineating which document should go into which envelope. So there is no more pulling exceptions, manually merging documents for the same customer or flagging certain customers for special inserts or marketing mail pieces. That information is now all in the secure barcode.

Moreover, with barcodes there is no double-, triple-checking that the right documents are in the right envelopes. It helps ensure that sensitive customer information goes to the right person. This makes preparing and sending mail incredibly efficient and less disruptive for your employees. It also ensures that your mail process meets compliance mandates or regulations.



### STEP 3

## Determine Which Communication Channels Would Work Best for Your Business

The way people receive their customer communications is changing, now you can choose to receive your invoices in the mail, email or even text. The choice is yours! With Document Management Software businesses of all sizes can offer e-delivery and “go paperless” without disrupting their organization.

### What is e-Delivery?

e-Delivery is the ability for your recipients to receive invoices or other important communications via a digital channel such as email or a web portal. When companies say they are “going paperless”, this is what they mean! Today most organizations—and customers—still want paper, but the demand for digital delivery continues to grow. Finding the right mix of delivery methods, both print and digital, for your company can meaningfully affect your business by improving customer satisfaction, increasing business productivity, and saving on mailing costs.

“The top three reasons that companies “go paperless” is process productivity, faster response and content security”

—Data from the Association for Information Management



## What are the benefits of e-Delivery?

1. **Boosted Productivity and Reduced DSO (Days Sales Outstanding).**  
Decreasing DSO helps speed up your cash collections process, which contributes to the overall health of your company. Having the ability to send important transactional documents digitally, you can get customer payments faster and can easily track delivery and open rates. By going digital, businesses are able to quickly fix deliverability issues, send reminder emails and have proof of delivery.
2. **Secured Customer Data:** e-Delivery, if done the right way using the right technology, ensures that customers receive the right communications every time. No more double-checking envelopes! Plus, if your digital delivery solution is hosted in a secure cloud environment, you can avoid the pitfalls of local security breaches or technical issues with local equipment.
3. **Enhanced Company Image:** Providing a digital delivery option gives your business a modern and sophisticated appearance. It also shows that you are eco-friendly.



More than **60%** of businesses believe that e-Delivery is going to be the main source of customer communications within the next five years. However, most companies still use print mail as the primary or only way they communicate with customers.

—Keypoint Intelligence InfoTrends, Mail Technology & E-Delivery Adoption (July, 2018)

## What is Hybrid Mail?

Savvy business leaders know where their company's strengths lie and when it is best to hand tasks over to a professional third party. If your business is maxed out on internal human resources, you might want to consider web-based mail fulfillment, or "hybrid mail", where mail is prepared and delivered externally.

Documents are uploaded online and a state of the art mail facility handles the complete printing, folding, stuffing and delivery process, while still providing you with complete tracking and visibility!

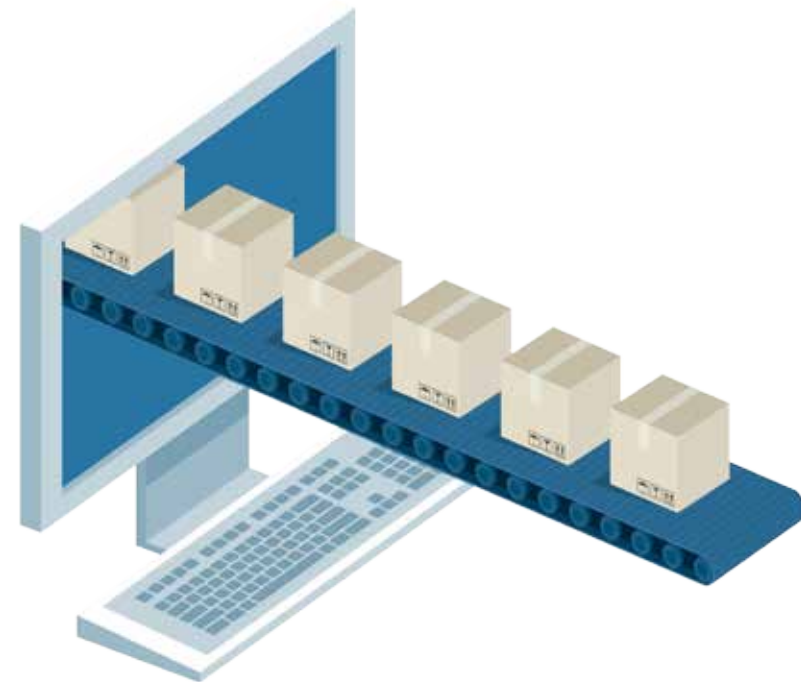
This not only ensures that your important documents reach the intended recipient, but if you are in a highly regulated industry—including healthcare, insurance or finance—it makes sure that you are fully compliant and covered for any regulatory audits (e.g., HIPAA, HITECH, PHI, etc.).

Once the documents are prepared to your specifications, they are sent via the customer's preferred channel, print or email. Whether you are sending a single document or thousands of documents at a time. The next time you review your business processes with your team, think about how hybrid mail can play a role in your workflow.



## What are the Benefits of Hybrid Mail?

1. Free up staff and other company resources for other higher-value, revenue-generating tasks.
2. Reduce your operational, production and postage costs vs. manually preparing mail.
3. Rely on the latest printing and mailing technology in a secure state-of-the art facility.
4. Reduces risk, while boosting compliance and providing an audit trail.



## STEP 4

# Start Small to Best Facilitate Employee Adoption and Minimize Company Disruption.

Choose a single-platform solution that lets you adapt changes at your own pace. Find something that does not require major IT intervention or resources to integrate. A platform with plug-in architecture is ideal as it means it is possible to fully externalize and customize your specific solution with the applications and value-added services that best fit your needs now and in the future.

Whether you choose a cloud-based or an on premise solution, you will want to consider ease of use, flexibility and what type of training will be required for your employees to make the transition as smooth as possible.

By taking these steps, you'll be on the road to automating your mail process and better connecting with customers as well as:

- ✓ Cutting unnecessary costs
- ✓ Automating manual and repetitive tasks
- ✓ Offering paperless documents to your customers
- ✓ Ensuring compliance and security
- ✓ Improving customer experience





## Conclusion

Now that you have Quadient's "4 Steps," we hope that you will be inspired to do more research into how you may be able to improve your outgoing mail process and start your own journey towards "Going Digital." Armed with these steps you can develop strategic moves to improve your mail process and begin your digital transformation.





## Quadient Output Management Software

If you need help automating your mail process ask your Quadient rep about output management software. OMS-500 document output management software helps you produce actionable, personalized and secure communications, using a simple intuitive interface. Deliver documents to the right person, at the right time, through their desired channels - all via a web-browser on a desktop.

**Get a Demo:** [mccsolutions.net/demo](https://mccsolutions.net/demo)

### Easily Integrate into Your Existing Systems:

OMS-500 does not require major IT intervention or resources to integrate and you can fully customize OMS-500 with the applications and value-added services that best fit your needs now and in the future. Count on our experienced team to assist you every step of the way from configuring OMS-500 to fit your specifications, through implementation and training.

### Exceed Everyone's Expectations:

OMS-500 is a one-time investment that is able to grow with your business, giving you the flexibility to add more services as your company evolves. Spend more time innovating and less time administrating. Save time, money, and improve customer relationships for years to come.





## ABOUT QUADIENT®

*Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on four key solution areas including Customer Experience Management, Business Process Automation, Mail-related Solutions, and Parcel Locker Solutions, Quadient helps simplify the connection between people and what matters. Quadient supports hundreds of thousands of customers worldwide in their quest to create relevant, personalized connections and achieve customer experience excellence. Quadient is listed in compartment A of Euronext Paris and belongs to the SBF 120 index.*

*For more information about Quadient, visit [quadient.com](https://quadient.com).*

### BACKED BY THE EXPERTS:

Quadient has best-in-class solutions that have been vetted by Gartner, Forrester, and Aspire.

### EXPERIENCE:

Together with Neopost Quadient has over 90 years of experience in mailing, process, shipping and experience solutions.

### PROVEN RESULTS:

A commitment to customer service with an A+ rating from the Better Business Bureau and a 96% customer satisfaction rate.

### EXPERTISE:

8 billion personalized experiences annually.