

## Mailroom Tools Business Assessment

In conjunction with our blog “4 Considerations To Ensure You Select the Right Tools For Mailing & Shipping”, this Assessment outlines detailed questions that will help you assess your company’s current mailing and shipping processes. It is designed to highlight areas you may not have considered when evaluating current processes and determining your needs. Use this information to guide discussions with potential vendors as you consider and acquire new equipment and software.

| Function Area        | Question   | Findings |
|----------------------|--|----------|
| Business Size/Growth | Overall and by key segments, is our business static, growing, or declining?  |          |
|                      | What is projected growth/decline over the next 5 years (%)?  |          |
|                      | Will current resources (personnel, equipment, software) be able handle growth. What specific areas will need to be changed ?   |          |
|                      | What areas/capabilities are designated for planned expansion (e.g. increasing digital options for invoicing; offering customers email notifications and confirmations of order shipments; reducing mailing/shipping expenditures; outsourcing mailing business-critical docs)? |          |
|                      | What measures do we need to put in place to remain healthy (relative to meeting customer needs)  |          |
|                      | Has the complexion of how we do business changed (e.g., as the result of COVID). How will this impact how we do business in the next 5 years?  |          |
|                      | What new product/service would we love to offer our customers but cannot currently?  |          |

| Function Area | Question   | Findings |
|---------------|--|----------|
| Personnel     | Are current personnel capable of handling projected growth or consolidation?   |          |
|               | Are we experiencing high employee turnover leaving a gap in training and expertise?  |          |
|               | Are personnel primarily on-site or remote?   |          |
|               | What processes are being done manually that pull employees from more important tasks e.g., manually filling out return receipt mail green cards, sorting and hand-matching variable-page communications? |          |
|               | Have we encouraged feedback from our employees to identify areas of improvement and process streamlining?  |          |
|               | Do we have a dedicated IT staff? Are they readily available to set up new systems/interfaces? Do we need to look at options that do not require IT involvement?  |          |

| Function Area | Question   | Findings |
|---------------|--|----------|
| Customers     | Can customers choose how they receive our business-critical documents and communications from us (e.g., mail, email, portal, sms)? |          |
|               | Are we able to provide immediate status information to our clients e.g, when items were mailed, shipped?                           |          |
|               | Are we able to send automated emails to our clients when an item is mailed or shipped?   |          |
|               | Are we able to ensure we meet privacy requirements with 100% accuracy to meet HIPPA, Sarbanes Oxley and other privacy regulations? |          |
|               | Can we customize messaging and offers to our customers in our invoices?  |          |
|               | What products/services do our customers want to provide that we do not currently?  |          |

| Function Area     | Question  | Findings |
|-------------------|---|----------|
| Current Situation | How do addresses get into our database? How are they kept updated? Do we do any address validation?   |          |
|                   | What is our mailing and package shipping volume & cost monthly/annually? What is % of each?   |          |
|                   | What types of mail do we use primarily – First-Class? Small or large packages? Any special services used such as Certified Mail?  |          |
|                   | Are we paying full price for mail and package shipments?  |          |
|                   | Can we send documents via email?  |          |
|                   | How much time is spent monthly to manually sort and match multi-page documents to customers?  |          |
|                   | Do we send Certified Return Receipt Mail? Are these done manually? How are green cards store? What is the volume?   |          |
|                   | How many envelopes (especially invoices) are returned with yellow stickers, due to bad addresses? How are these handled? How long does it take to correct? What steps are involved? |          |
|                   | Do we utilize an outside resource to handle seasonal volume spikes?   |          |
|                   | Are we paying full price for postage and shipping?  |          |

| Function Area        | Question   | Findings |
|----------------------|--|----------|
| Accounting/Reporting | Are our invoices paid promptly or is there a consistent delay? What % of our receivables are 45+ days?   |          |
|                      | Can we consolidate invoices and statements in one envelope to save material and postage costs?   |          |
|                      | Are we able to identify all our mailing/shipping expenses down to departmental or customer expenses?   |          |
|                      | How do we gather reporting information? Must we gather it from multiple resources or is it available from a single source?                                   |          |
|                      | Are we able to chargeback mailing/shipping expenses to department or customers, or are they a cost of doing business that drops straight to our bottom line? |          |
|                      | How much overtime are we paying for employees to do manual tasks that could be automated?  |          |

| Function Area | Question   | Findings |
|---------------|--|----------|
| Processes     | Can we combine or reduce multiple platforms to have a single log-in for USPS, FedEx and UPS? |          |
|               | Can we bring all our data into one source to maximize our Service Level Optimization?        |          |
|               | What processes would we like to automate?  |          |
|               | What processes are not working for us currently?   |          |
|               | What is our weakest link?  |          |

| Function Area                             | Question   | Findings |
|---|--|----------|
| Security of Personal Customer Information | Are we preparing and mailing sensitive customer information manually?        |          |
|   | Do we have systems in place that guarantee information will be kept private? |          |

| Function Area  | Question   | Findings |
|----------------|--|----------|
| Vendor Support | Do we have <u>local</u> support when we need an assessment of our current capabilities, when there's an equipment problem or new employees need to be trained? |          |
|                | Can we function effectively if equipment needs to be returned to and replaced by the manufacturer because there is no local assistance?                        |          |
|                | How often are our employees placed on hold for 5, 10, or 30+ minutes whenever they need assistance from mailing/shipping vendors?                              |          |

We'd be happy to review this information with you in order to identify the best tools and processes to help your company become more efficient and improve customer satisfaction.

**Call today for your no obligation, in-person review of your needs  
and a **FREE CMS Recommendation.****

**303-761-0681**