Growing Client Satisfaction with Value Added Services

When one of our Item Processing clients was challenged with numerous research-intensive requests, increasing mailing costs, and a desire to print ad-hoc print files without the need for customized programming — we were able to help them on all three fronts.
Responding to our client’s needs; expanding overall capabilities.

The Challenge
We had built a solid relationship with one of the nation’s largest financial services holding companies providing Item Processing services for its thousands of branches. Confident in our capabilities and service quality, they turned to us when challenges arose in three areas:

- In the Research space – They were getting numerous requests from a variety of entities to deliver subpoenaed documents via CD-ROM instead of paper. These requests typically involve large volumes of documents (i.e. years worth of bank statements, cancelled checks and deposits), high shipping costs and extensive research time. They wanted to convert their paper-based research system into one that could fulfill document requests via CD-ROM.
- In the Mail space – The institution was looking for ways to reduce ever-increasing postage expenses on its mailings.
- In the Print space – The client wanted a way to print “ad-hoc” print files without requiring customized programming for each of these files to be able to go through the normal mainframe print process (a very time-consuming, expensive and inefficient process for these one-time-use files).

The Solution
- In the Research space – Our IT experts went to work evaluating our research system to make enhancements that would enable the fulfillment of subpoenaed document requests on CD-ROM. Within a matter of months, our system was adapted to institute this capability.
- In the Mail space – We developed and presented several ideas that would reduce postage expenses for our client. They chose from these ideas and with our assistance, developed a postcard form that replaced several of their notices, as well as folded bank statements to replace flat/unfolded statements.
- In the Print space – We developed a process where the client can send us mailing lists and letter templates in MS Word format. We then perform a mail merge function (merging the mail list with the appropriate template) to create the print file. This file is then sent to an automated printing and rendering device. Overall, the process is almost as automated as the normal mainframe print process, without the need for programming resources and the associated time delays.

The Results
- The client now can supply subpoenaed document requests on either CD-ROM or paper, giving requestors much more latitude and significantly reducing related shipping expenses and research hours.
- The mailing-related solutions we suggested and helped the client implement were very effective in reducing postage costs – resulting in a 35% overall savings on postage for the client – more than $150K per month.
- The client can now efficiently print and send ad-hoc print files without the need for time-consuming customized programming and its associated expense.