

mailing.com



CASE STUDY

How a Financial Institution
**Modernizes Regulatory
Communications** by
Partnering with mailing.com

Overview

A regional financial institution with a nationwide customer base faced mounting challenges managing its high-volume, compliance-driven customer communications. From regulatory notices and loan statements to tax documents and account correspondence, the institution needed a solution that balanced speed, accuracy, and security. In late 2023, they partnered with mailing.com to consolidate their print and mail operations, improve compliance tracking, and enhance the customer experience.

Challenge

The institution relied on multiple legacy vendors with limited automation, creating inconsistent workflows and poor visibility into mailing performance. Monthly communications included hundreds of thousands of regulatory notices, account statements, and payment reminders—each governed by strict compliance requirements. Manual handling and fragmented processes increased the risk of errors and delayed delivery, exposing the organization to potential regulatory scrutiny and customer dissatisfaction.

Additionally, the institution struggled with maintaining proof of mailing for time-sensitive regulatory communications, as well as providing customers with secure digital access to documents and payment options.



Solution

mailing.com implemented a fully managed document processing workflow customized for financial-sector needs.

Files are now transferred securely via SFTP, where they are assigned unique Work Order IDs for complete lifecycle tracking through mailing.com's secure customer portal. The process includes real-time validation, automated proofing, and redundant production across mailing.com's Canon, SCREEN, and RISO production lines—ensuring both speed and accuracy.

To strengthen compliance, mailing.com integrated IMb tracking and certified mail with return receipt for critical regulatory documents, giving the institution verifiable delivery and proof-of-mailing records.

The institution also adopted Vault, mailing.com's secure document presentment and payment platform. Vault allows customers to access statements, tax forms, and correspondence online, while providing a convenient, compliant way to make payments—reducing call center volume and improving the customer experience.

By consolidating with mailing.com, the financial institution transformed a complex, compliance-heavy operation into a streamlined, secure, and customer-focused communications process—improving efficiency while reducing regulatory risk.

Results

Within 60 days, the healthcare provider transitioned 100% of its outbound communications to mailing.com, achieving:

25%

Reduction in turnaround time

100%

Compliance for time-sensitive regulatory mailings

Automated

Certified mail tracking with proof-of-mailing

Secure Access

Improved customer engagement through Vault's secure online access and payment capabilities

We Can Help You Too!

mailing.com owns your entire mail program end-to-end, from data through delivery.

One team. Full accountability. No vendor juggling. No handoff gaps.



One Team, Full Accountability

No rotating reps. No re-explaining your program. Your dedicated team stays assigned and builds working knowledge of your business over time.



Scale Without Adding Risk

Seasonal spikes, new programs, and complex requirements. Our infrastructure absorbs it without delays or drops in quality.



Multi-generational Expertise

Decades of experience producing high-volume mail for regulated industries. We know what formats drive response and how to optimize for cost and speed.



Six Production Facilities

Full redundancy and capacity to meet your growing needs. Quality controls built into every stage of the process.

Production Capabilities

- In-house envelope conversion
- Inkjet press 300 to 1200 DPI
- Digital and lithography presses
- Inline match mail and inkjet print
- White-label production for marketing and transactional mail
- API-driven mail integration



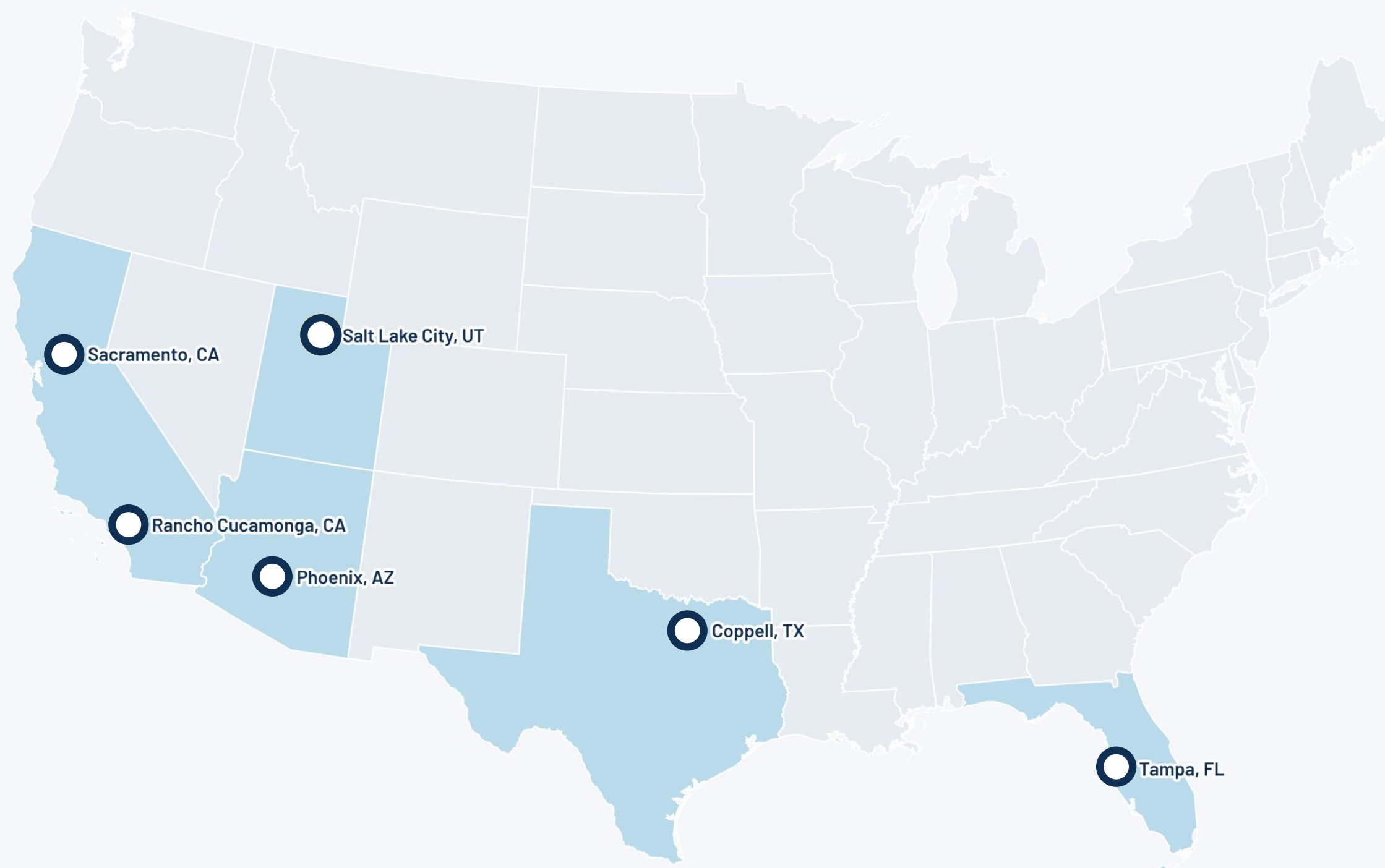
**White-label
production**



**API-driven mail
integration**



**Full-service
managed programs**



Ready to bring your mail
program **under one roof?**

Contacts us today or scan the QR code

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