



Mail Made Easy - Mailing Visibility Tools That Can Save You Money

One of my team members always says, “People don’t make bad decisions, they just lack the needed information”. We manage the mailing spends of some of the largest organizations on the planet and prior to our partnership, many lacked the visibility to their data. With the right data you can find ways to do the following:

- Reduce mailing equipment costs
- Save money on postage by being able to see mail discounting opportunities.
- Better manage postage funds to eliminate loss, avoidable fees and excessive balances.

Our goal with this article is to guide you to what tools are available for you to gain access to your information and find savings for the future.

We are focusing on mailing equipment and postage spends because this touches the majority of organizations and this category is often overlooked. It can be very difficult to gain visibility because the data is not often provided in a format that is complete or easy to understand. For every mailing system you need to know the following pieces of information:

- **Account numbers** – Every meter or pc postage license will have 2-5 different account numbers and most are not listed on the same invoices. You have a main installation account, lease account, prepaid postage account and advance postage account if you borrow funds.
- **Lease Information** – Most mailing systems today are leased and you have to be very careful about your end dates and terms. Most of the meter vendors have evergreen clauses that automatically renew your lease for an additional year if you do not notify them within 90 days of the end of term. To make matters difficult, your end of lease date is not listed on any of the invoices and or on the online systems. It is something that needs to be requested or may be on an initial communication from the vendor.
- **Equipment Descriptions** – Model, serial number, installation date, and a description of the unit. You might think you have model “x” but this is typically broken out to 2-5 different models and serial numbers.
- **Postage Spends** – These are the usage levels and balances in the prepaid and advance accounts.
- **Invoice Detail** – The charges that you are paying for the different services such as rentals, maintenance, rate changes and leases.





The rest of this article is going to focus on what tools are available to help you manage this data. This is the key to having better cost controls, increasing accuracy in budgeting and finding cost savings. In the chart below, this category is broken out by the types of data required and the different groups that can support you in your quest for information.

There are three places that you can go for support:

1. **Meter Vendor** – This is your provider for mailing equipment. They all have online tools where you can get access to your information.
2. **PC Postage Providers** – If you are generating stamps and package labels through your computer, these providers have online tools that can give a higher level of information.
3. **Mail Audit and Recovery Firms** – These vendor-neutral companies typically focus on organizations with 20 or more sites with equipment and provide a deeper level of data visibility and account oversight. They are brought in to better manage the data, find ways to yield savings, reduce costs and increase the ROI.

Online Tools	Meter Vendor	PC Postage Providers	Mail Audit and Recovery Firms
Mailing Equipment Spends			
Lease Billing	Yes	N/A	Yes
Lease Terms (End of lease dates and equipment covered)	No	N/A	Yes
Rental Billing	Yes	Yes	Yes
Maintenance Billing	Yes	N/A	Yes
Equipment Detail (Model, Serial Number, Install Date, Description)	Some vendors	Yes	Yes
Postage Spends			
Postage Transactions	Yes	Yes	Yes
Postage Statements	Yes	Yes	Assist and review vendor bills.
Mail Class and Cost Center Detail	With additional subscriptions (additional cost)	Yes	Assist and review class detail.
Management Tools			
View all account numbers by location	No	Yes (Enterprise versions only)	Yes
Consolidate total spend by location (Equipment and Postage)	No	Yes	Yes
Link postage spends to equipment costs to determine rightsizing opportunities	No	Yes	Yes
View consolidated spends by location for multiple sites (Lease, Rental, Maintenance and Postage)	No	Yes	Yes
Consolidate multiple vendors onto single view	No	No	Yes





View contacts and notes from your locations	No	No	Yes
Assistance getting information onto web tools	Limited	Will create login, linkage and training.	Will create login, linkage and training.

Mailing Equipment Spends

The biggest differences between three support models are how the information is presented.

Meter Vendors - Although each vendor provides different levels of detail, you should expect similar information to what you are being sent in the mail. Some of the meter vendors provide the ability to see your inventory of equipment.

PC Postage Providers – They can provide details of all of your subscription and supplies costs. They will also list out levels of service and start dates.

Mail Audit and Recovery Firms – They are reviewing each invoice for accuracy and displaying the summary information regarding your bills. They should be able to show all of the lease details including end of term dates and as well as a deeper view of all equipment and services.

Postage Spends

This is one of the most important areas to manage online and all providers have tools that can help support your needs.

Meter Vendors – Most vendors provide you a way to see past postage statements online as well as the different refill transactions. This information can be downloaded into excel for ease of management. For an additional monthly fee, they can give you visibility to the cost center and class breakdown of your mail. This level of detail is the best way to reduce postage costs because you can see specific areas where mail can be moved from one type of service to another.

PC Postage Providers – These companies have the highest level of detail in one place. You can see past statements, transaction history, cost center and class detail as well as being able to see which users ran mail throughout your enterprise.

Mail Audit and Recovery Firms – They take the data available from the Meter Vendors and PC Postage Providers and consolidate it onto their dashboards. Many companies never access the information described because they do not have the time or understanding. These firms will pull the data into their needed format, consolidate it for ease of viewing and provide recommendations for savings.

Management Tools

Now that you have the data on the equipment and postage, what do you do with it to drive savings? Each of the providers handles this in different ways.





Meter Vendors – With the data available you can now go in and find savings but it is typically more manual. The big challenge is linking the equipment costs to the postage spends. You would need to export your different invoices, summarize by site and then link the postage spends to these costs manually. The postage exports are typically listed by account number and meter serial number which may be different numbers than what is listed on the equipment invoices. If you have multiple sites, each can be linked for viewing but the data may not be consolidated together. The big challenge is finding all of your account numbers and linking each one to the vendor’s website. These systems are designed to be client initiated, but there are support tools that can help. Also, some vendors will require that you have multiple log-ins if sites are not on consolidated billing.

PC Postage Providers – These services provide detailed reporting around your spend. The subscription costs are typically simple and it is easy to link them back to the postage spends. If you have multiple locations with the same vendor, they can provide summary reports linking service charges to usage levels. They may also set the online visibility up for you while linking your sites together.

Mail Audit and Recovery Firms – This is where these firms shine because their business is about presenting the data in an easy way to obtain savings. They can provide dashboards providing visibility all of the equipment at each location and link this to the postage activity to determine the Spend Ratio (Equipment Cost over Postage Spends). This makes it easy to analyze if the equipment level is in line with your spend. Since they focus on multi- location organizations, they can show you your costs at each site, across your enterprise, and from all of your vendors. They will provide 24/7 access to web-based tools, maintain the data and provide visibility to the needed parties. They will then help implement cost savings found inside the data.

Conclusion

We find that most organizations are not using the data above either because they do not understand what is available or don’t have the time to manage it. There are great tools from all of the providers to get the detail needed to make better decisions and find ways to save money. It just takes making the first step to get your accounts set up and to get you the visibility needed.

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