

How Mail Dashboards Unlock Hidden Postal Savings

One of the most famous quotes in business is, “If you can’t measure it, you can’t manage it.” Yet when it comes to mail, many organizations continue to make decisions with limited visibility into one of their largest operational expenses. ***This is more important than ever as postage costs have gone up a staggering 42-79% over the last 5 years.***

The challenge isn’t a lack of data. In fact, mail-related information exists in abundance. The problem is that it is often fragmented across multiple departments, vendors, USPS® accounts, and financial systems. Without a centralized way to collect, standardize, and analyze this information, organizations struggle to identify savings opportunities or measure the effectiveness of their mail programs.

A well-designed mail dashboard provides a framework for bringing all of this information together. It creates visibility into spending, identifies opportunities for improvement, and helps organizations track savings through implementation. More importantly, it turns mail from a largely unmanaged expense into a category that can be actively monitored and optimized.

Mail expenditures typically fall into three primary categories:

- **Mail Equipment and Online Postage** – Postage meters, mailing equipment, and online postage solutions used throughout an organization.
- **USPS® Permits and Accounts** – Direct USPS accounts used to fund and submit mailings.
- **Outsourced Print, Mail, and Presort Services** – Third-party providers that produce, process, or presort mail before it enters the USPS network.

Understanding these three categories is the foundation of building a meaningful dashboard and uncovering opportunities for savings.

Accessing the Data

Creating a dashboard is often the easy part. The real challenge is gathering, validating, and standardizing the information needed to populate it.

Mail-related data is rarely housed in a single system. Organizations must often work with Accounts Payable, Mail Operations, Marketing, Accounts Receivable, Development, and external vendors to gain complete visibility into their mail spend.



The process typically includes:

- Identifying all mail-related vendors through Accounts Payable records.
- Obtaining copies of invoices and account information.
- Requesting reporting and transaction-level detail from vendors.
- Creating and linking online portal access for all accounts.
- Extracting transaction activity, postage statements, and invoices on a regular basis.
- Consolidating the information into a centralized reporting structure.

The table below outlines the primary data sources required for each category of mail spend.

Steps	Postage Meters	Online Postage	USPS Accounts	Outsourced Print, Mail and Presort
Search Accounts Payable for the following vendors	Pitney Bowes, Quadient, FP	Stamps.com, Pitney Bowes, Endicia.com, Shippo, ShipEngine, ShipStation, EasyPost, EasyShip	United States Postal Service, Post Office, USPS, Postmaster	Talk to the following departments to see what vendors they use: Accounts Receivable (Invoices and Statements), Marketing, Development (Promotional Mailings), Large mailrooms - Presort Services
- Pull Invoice copies to find out the account details	X	X	X	X
Identify Vendor Account Resource	X	X	X	X
Request Vendor Reporting				
- Locations utilizing services with account numbers	X	X	X	X
- Equipment and Subscription Details	X	X		
- Contract Terms, (Expiration dates and clauses)	X	X	X	X
- Rates and Fees	X	X		X
Access Vendor Websites				
- Create login	X	X	X	X
- Link all locations and accounts	X	X	X	X
- Extract transaction activity monthly	X	X	X	X
- Pull invoices and postage statements monthly	X	X	X	X
Enter Data to your Dashboard	X	X	X	X

Once the data is centralized, organizations can begin analyzing each category for savings opportunities.

Mail Equipment and Online Postage

For many organizations, mail equipment and online postage are managed independently at individual locations. This often leads to unnecessary costs, underutilized equipment, duplicate services, and a lack of oversight over contract renewals.

Key Savings Opportunities

- Right-size equipment by comparing equipment costs against postage usage. We routinely find locations paying for equipment far beyond their operational requirements.
- Track agreement expiration dates and renewal activity across all locations.
- Identify locations that would benefit from moving from traditional postage meters to online postage solutions.
- Eliminate inactive equipment and unused subscriptions.
- Review fees and surcharges. Mail vendors often charge numerous administrative, service, and funding-related fees that may be reduced or eliminated.
- Recover dormant postage funds sitting in prepaid accounts, meters, or abandoned balances.
- Optimize postage methods. For example:
 - Moving qualifying mail to presort services. 10-20% average savings
 - Converting package volume from metered mail to online postage solutions. 25% average savings
 - Replacing physical return receipts on Certified Mail with electronic alternatives. \$1.74 per piece savings

Key Metrics to Track

- Equipment details, including model numbers, serial numbers, installation dates, and locations.
- Contract expiration dates and renewal status.
- Postage usage and spending trends.
- Total expense compared to postage spend.
- Account numbers and associated billing structures.
- Account balances and funding activity.
- Advance funding fees and loyalty or reward balances.

USPS Accounts

Once visibility has been established for mail equipment and postage funding, attention should shift to USPS permits and accounts. This is often where the largest postage expenditures occur and where small operational improvements can generate substantial savings.



Many organizations focus on total postage spend without understanding how their mail is being prepared, entered, and discounted. A dashboard should provide visibility into the factors that drive USPS pricing.

Key Savings Opportunities

- Determine whether better sortation levels can be achieved.
- Compare internal mail preparation against third-party presort providers.
- Identify mail being sent at single-piece rates and determine why discounts are not being achieved.
- Evaluate lightweight flats that may qualify for lower-cost letter formats.
- Measure participation in Full-Service Intelligent Mail discounts.
- Track Sectional Center Facilities (SCF) pallet discounts and destination-entry discounts.
- Monitor USPS promotions and incentives being applied to mailings.
- Review parcel pricing to ensure access to the most advantageous USPS rate structures.
- Compare mailing performance across providers and locations to identify best practices.

Key Metrics to Track

- Active CRIDs and permits.
- Activity and spending by permit.
- Mail class, volume, postage, and average cost per piece.
- Production location and service provider information.
- Sortation levels achieved.
- Destination-entry discounts received.
- USPS promotions and incentives utilized.
- Permit renewal dates and account contacts.
- Business Reply Mail account activity and fee structures.

Outsourced Print, Mail, and Presort Services

For many organizations, outsourced print and mail services represent the largest and least visible category of mail spend. Rates, fee structures, and production methods can vary significantly between providers, making benchmarking essential.



Without detailed reporting, it is difficult to determine whether pricing is competitive or whether mailing practices are optimized.

Key Savings Opportunities

- Compare service fees across providers and against market benchmarks.
- Conduct periodic RFPs to validate pricing competitiveness.
- Analyze postage performance between providers to identify best-in-class practices.
- Review production processes to determine whether simple operational changes could reduce costs.
- Evaluate opportunities to replace physical processes with digital alternatives where appropriate.
- Assess whether certain functions are better handled internally or outsourced.

Key Metrics to Track

Presort Services

- Locations utilizing presort services.
- Vendor information and service agreements.
- Presort fees and ancillary charges.
- Pickup, non-qualifying piece, and address correction fees.
- Invoice details and historical pricing trends.

Outsourced Print and Mail Providers

- Contract terms and pricing schedules.
- Invoice-level detail for validation and benchmarking.
- Service descriptions and production specifications.
- Cost comparisons across providers and locations.
- Opportunities to simplify workflows and eliminate unnecessary charges.



Bringing It All Together

Mail remains one of the largest unmanaged expense categories for many organizations, with businesses spending more than \$150 billion annually on postage, equipment, and mail-related services.

The opportunity is not simply collecting data—it's transforming that information into actionable intelligence. Effective dashboards provide visibility into spending, reveal operational inefficiencies, benchmark vendor performance, and help organizations measure savings over time.

The challenge is that mail data is rarely housed in one place and often requires ongoing maintenance, validation, and analysis. Organizations that successfully centralize and manage this information gain a significant advantage in controlling costs and improving operational efficiency.

The result is not just lower expenses, but better decision-making across the entire mail ecosystem.

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