

# We invest in technology. So you can impress your clients.

Your account number  
Total amount due  
Due immediately  
Due May 04  
Amount of your payment

17062  
\$183.34  
\$111.02  
\$72.32

\$



Customer Communication Specialists

## Financial Statement Services, Inc. (FSSI)

### Challenges

FSSI is a full-service communications leader with a focus on financial services. The company sought to increase efficiency, in both mail delivery and tracking, to achieve greater cost efficiencies and volume discounts that benefit their clients.

### Solution

Deployment of Pitney Bowes Presort Services to pick up, sort, bundle and deliver FSSI's mail to the United States Post Office three times a day, averaging over 100,000 pieces daily.



**Financial Statement Services, Inc. (FSSI) selected Pitney Bowes Presort Services because it was more technologically advanced than competing partners, and could offer better closed-loop mail tracking and mailpiece visibility.**

### Summary

FSSI was founded in 1980 and is now one of the largest independent woman-owned providers of statement services in the western United States. The company delivers highly customized variable-data printed and electronic document production and distribution solutions that help clients save money and communicate more effectively with their customers.

FSSI is equipped to receive encrypted data from virtually any transmission method. Once received, data is verified and processed to generate customized hard copy, electronic documents and reports. FSSI also offers ink-jet printing, full-color digital print solutions, digital document delivery and management, SMS, mobile apps and other direct mailing services that allow clients greater flexibility in developing unique and innovative customer communications.

For years, the company has relied on Pitney Bowes® mailing equipment and software to add speed and integrity to its mail production. Recently, FSSI expanded this relationship to include Pitney Bowes Presort Services. Three times a day, Pitney Bowes picks up FSSI's mail, then preps, presorts and inducts it into the US Postal system. While most companies see this as a service offering, FSSI understood that Pitney Bowes technology could help them pass along significant advantages to their clients. "By leveraging Pitney Bowes Presort Services' investment in advanced tracking technologies, we avoided a significant capital expense and lowered the cost of serving our customers," notes Henry Perez, FSSI's Chief Operations Officer.

## Results

"We have presorted our mail in many different ways, including in-house, and with other presort service companies," Perez explains. We've also worked directly with the Post Office and even had a Delivery Mail Unit in our own facility. Pitney Bowes Presort Services has been the most efficient and cost effective method to date. Pitney Bowes' competitive pricing also enables us to pass along savings to our clients," he adds.

## Greater speed and efficiency

Perez also cites other vital business reasons for evaluating and implementing Pitney Bowes' solution. "Previous companies lacked both Pitney Bowes' national reach and technology investments," Perez explains. Their advantages in mail tracking, Permit Imprint Indicia, and control of time in the Mail Exchange offering, have all met or exceeded our expectations. The best part is that we're able to leverage these benefits while avoiding the equipment investment," he adds.

## Detailed tracking, reporting and mailpiece visibility

Because FSSI specializes in financial statement mailings, it is imperative that the company knows exactly when each piece is delivered. Compliance issues, time-to-revenue concerns and customer satisfaction issues all drive FSSI's need for a tightly controlled mailpiece tracking process.

## Tax forms processing

For example, few documents contain more sensitive information than tax forms. A single breach of personal or financial data can put clients at serious risk and expose an institution to penalties and litigation. FSSI specializes in processing

and mailing IRS-compliant tax forms, and guarantees the accurate, timely, secure handling of every client record. Pitney Bowes helps FSSI back up that guarantee.

"FSSI's business partners require transparency into our entire process. They want to know that when they entrust their data to us, it's a clean handshake, and that we can audit their mailpieces all the way through the process," Perez continues. "With Pitney Bowes, I can count on an exceptional level of trackability and granular status information that I can confidently share with clients."

Mailpiece tracking also allows FSSI to verify receipt, provide proof of mailing and coordinate follow-up efforts as necessary. To achieve such granularity, Pitney Bowes and FSSI utilize USPS Intelligent Mail® barcodes for mailpieces that require this level of audit. IM™ Barcode enables electronic tracking for all First-Class Mail®, Standard Mail®, letters and flat-sized items.

## Confidence, reliability and trust

Much of the mail that FSSI processes for its clients is time-sensitive, and must conform to governmental regulations. Clients need to have rock-solid confidence that FSSI is handling, preparing, processing and delivering their communications in a precise and timely manner, according to regulatory requirements. The deployment and integration of Pitney Bowes Presort Services is playing a vital role in helping FSSI provide this confidence and fulfill its pledge of unsurpassed quality, accuracy and security.

By leveraging Pitney Bowes Presort Services' investment in advanced tracking technologies, we avoided a significant capital expense and lowered the cost of serving our customers.

Henry Perez  
Chief Operations  
Officer  
Financial Statement  
Services, Inc.

Pitney Bowes  
World Headquarters  
1 Elmcroft Road  
Stamford, CT 06926-0700  
888 245 PBMS  
[www.pb.com/mailservices](http://www.pb.com/mailservices)

Every connection is a new opportunity™

© 2011 Pitney Bowes Inc.  
All rights reserved