



Shipping and Mailing: An Untapped Opportunity for Savings and Growth

From streamlined tracking to analytics, shipping software empowers financial institutions to optimize operations, strengthen compliance, and protect profitability.



Fast-paced and ever-evolving, the financial services industry demands efficiency. And even if the rest of your business is on the cutting edge, an outdated shipping and mailing process could be exposing you to risk, sabotaging your customer experience and costing you an arm and a leg. Your missing link? A streamlined solution that protects your customer and employee data.

1. Ensure total data visibility

80% of financial firms cite data visibility as a significant hurdle to making effective decisions.¹ Without shipping data, your bank's decisions are made with an incomplete picture, and missed opportunities.



Whenever your financial institution sends an important document or package, it's forced to navigate a complex network of carriers, with different rates, services, and service level agreements. It's relatively simple for a single banking branch to track and ship a few items.

But when you multiply that by your total number of locations, it becomes difficult to maintain visibility, confirm delivery and ensure the best possible rate for every item. This challenge is only compounded when you include special needs like overnight shipping and signature requirements. With the help of a multi-carrier sending platform, it's simple to send and track every single item across your whole business, regardless of location, carrier or need. This allows you to optimize shipping rules by employee and location

to ensure the smartest and most cost-efficient shipping method is used every time. With this kind of visibility, you'll have all the information you need to make critical decisions and meet customer expectations.

Visibility into incoming shipments your business receives can be just as, if not more, important. If employees are manually tracking items as they arrive at each location's mail center, those items can easily become lost, misplaced or delayed. With the help of barcode scanning, incoming items can be tracked until they're safely in the hands of the intended recipient. For offices with hybrid work schedules, smart lockers provide a convenient delivery alternative that logs tracking and pickup data on the same interface as all outgoing shipments.

2. Protect customer data and build trust

Customer data is one of your financial institution's most valuable assets. If mishandled, you risk your reputation and bottom line.

Not all sending software is created equally. While some options may provide the streamlined experience you seek, those that don't prioritize security will create gaps in your financial institution's otherwise strong defenses. By selecting a provider that takes a security-first approach to its operations, you ensure the protection of your customer data.

Pitney Bowes does just that, with robust, multi-layered security that follows strict international standards and regulations to ensure the integrity of your data. With secure, cloud-based storage, it protects against security threats and ensures data is accessible only to authorized users. In addition, its address verification feature confirms recipient addresses before postage is printed to eliminate the risk of misdelivery or sensitive information getting into the wrong hands.



Did you know?



1 in 2

Americans have considered switching banks in the past two years.²



\$270 billion

is spent on regulatory compliance each year by financial institutions.³

3. Discover opportunities for cost management

Your financial institution could be sitting on a mountain of savings and not even know it.

You might think sending software would be cost prohibitive. Think again. With Pitney Bowes, you'll unlock cost, labor and time savings that more than pay for the software itself. You'll gain access to discounted shipping rates and a consolidated, enterprise-wide dashboard for shipping and mailing activity across all locations. The platform's state-of-the-art analytics tools will reveal otherwise-hidden inefficiencies and provide proactive recommendations based on mail usage. You'll be empowered to make smarter decisions and optimize your institution's sending rules down to the smallest detail.

But those aren't the only ways you'll save. Customer data protections reduce the risk of time-consuming and costly security breaches. Address verification limits the risk and associated costs of a mistyped or incorrect address. And internal package tracking requires less manpower while ensuring all incoming items make it to their intended destination in a reasonable time.

The secure, cloud-based [Pitney Bowes Shipping 360® platform](#) provides centralized visibility into all shipping and mailing data for authorized stakeholders, ensuring regulatory compliance and enabling fast, reliable access during audits.

Ready to reduce risk and discover untapped savings?

Connect With an Expert



¹ Financial Brand 2025 Report

² FirstTech Primary Financial Institutions Banking Survey

³ Thomson Reuters Analysis