

# Docutech cuts postage costs while maintaining critical SLAs for mortgage docs.

## Client profile

### Docutech

docutech.com

- Twenty-eight-year-old company with facilities in Idaho Falls, ID, and Tempe, AZ
- Provides document-related technologies to mortgage, home equity and other consumer lending organizations
- Services range from digital document generation to eSignature capabilities, to print fulfillment of loan documents
- Solutions comply with loan packaging laws in all 50 US states



## Overview

For nearly three decades, Docutech has been supporting mortgage lenders across the United States by delivering documents to consumers in both electronic and paper versions. Several years ago, the company saw an opportunity to reduce postage costs by using a presort facility. Pitney Bowes® Presort Services was the only company Docutech found that could accommodate its requirement for same-day service six days a week. Pitney Bowes has been meeting this need ever since, while saving Docutech over six figures annually on postage costs.

## Business challenge

Docutech specializes in digital loan documentation. Most borrowers receive electronic files that they eSign, but some still receive paper. "There are folks who want hard copies of mortgage documents, to review and scribble on before they sign," says Angelo Messina, Director of Fulfillment Operations. Hard copies also go out if consumers fail to eSign documentation in a certain timeframe.

The company's Tempe facility mails around 6,000 envelopes a day containing documents from a single page to more than a hundred. Several years ago, Docutech was paying full USPS® rates for these mailings. It began looking for a provider that could help reduce its postage costs.

Same-day delivery to the post office, every Monday through Saturday, was a non-negotiable need.

*"I've worked with Pitney Bowes for years, and they have never failed to provide excellent service. They are always looking for ways to help customers get mail through the system faster."*

— Angelo Messina,  
Director of Fulfillment Operations,  
Docutech

---

## Services used

- Pitney Bowes® Presort Services
- Pitney Bowes Move Update Service
- The Pitney Bowes Bank, Inc., Member FDIC

*"Pitney Bowes is getting all our pieces to their intended recipients on time. They make it easier for us to conduct our day-to-day business."*

— Angelo Messina,  
Director of Fulfillment Operations,  
Docutech



---

For more information,  
visit us online:  
[pitneybowes.com](http://pitneybowes.com)



"Mortgage industry regulations require that documents get printed, inserted and postmarked within 72 hours of completion of the loan application," Messina says "Our service-level agreements [SLAs] with our customers mandate same-day turnaround on our entire process."

## Solution

Decision-makers briefly considered a presorter that did not provide same-day turnaround on Saturdays. Then they discovered Pitney Bowes® Presort Services could meet all their needs.

Today, all Docutech has to do is print the documents and stuff the envelopes. Pitney Bowes picks up the mail and commingles it with mailings from other Pitney Bowes customers to help Docutech achieve the best available postage rates.

During the sorting process, the Pitney Bowes Move Update service confirms the accuracy of every address, correcting any errors. This results in fewer undeliverable pieces. "Consistency is my friend," Messina says.

## Benefits

"Failing to meet our SLAs would lead to serious customer service challenges," Messina says. "Delays in getting a document out would cause problems for the customer's loan processing. But Pitney Bowes is getting all our pieces to their intended recipients on time."

The solution is delivering the intended savings, as well. "Using Pitney Bowes Presort Services is reducing our postage

costs by about \$150,000 annually," Messina reports.

Docutech uses an FDIC-insured deposit account at The Pitney Bowes Bank to pay for these services. Pitney Bowes estimates the cost of upcoming mailings and deducts payment from the account. The deposit account is automatically replenished via ACH transaction when it falls below a predetermined amount. "Pitney Bowes Financial Services provides an easy way for our accounting team to make sure the bills are always paid and the mail keeps flowing," Messina says.

Apart from the specific benefits of mail commingling, Messina points to the overall value of Docutech's relationship with Pitney Bowes. "I've worked with Pitney Bowes for years, in different companies," Messina says, "and they have never failed to provide excellent service. They are flexible. They keep us abreast of upcoming changes from the USPS. And they are always looking for ways to help customers get mail through the system faster and more accurately."

One of the ways Messina and his colleagues stay on top of their mailing game is through quarterly business reviews with Pitney Bowes. In a recent review, Messina recalls, the Pitney Bowes customer service representative brought a report showing the frequency of addresses proving unreadable by the automated sorting machines. "Our read rates were falling," he says. "Our Pitney Bowes rep suggested a font change. Following his advice increased our read rates to 96 percent on the first pass. We work together in partnership with Pitney Bowes, and they make it easier for us to conduct our day-to-day business."