

# Preparing the Communication for Delivery with Sorting and Bundling

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## Abstract

Post-processing is crucial to a Customer Communication Management (CCM) system. Its main objective is to guarantee that documents are excellently finished, checked for reliability, appropriately arranged, and sent by the proper transfer routes. Sorting and bundling are necessary steps in post-processing. Sorting and grouping are essential processes in Customer Communication Management (CCM), and they are mainly employed to make the processing and delivery of communications like bills, statements, notices, and promotional material as good as possible. These operations ensure that documents are appropriately arranged, neatly packed, and transported to the correct recipient at the lowest cost and most efficiently and directly.

**Keywords:** Customer communication management (CCM), High volume delivery, Sorting and bundling, Printing services

## Introduction

Many times, we come across getting communication for two family members in one single packet. We imagine how a bank or an insurance company can do it by checking through thousands of customers. When an organization shares a printed communication. Before reaching the end customer, a printed communication goes through a series of events. While bankers and insurance companies have much to address regarding communication for the different family members expecting service from the duplicate packets, they try to carry out the process well. Much of the sorting and bundling processes are of the essence in bringing it to an end, especially when the printed material inflow is skyrocketing, and thousands of customers are to receive their monthly or even yearly or other forms of statements.

Customer communication management (CCM) tools enable the automation of sorting and bundling of communications, which guarantees the cost-effective delivery of accurate services, thus, in turn, increasing customer satisfaction.

## Need of Sorting and Bundling

Before tools for sorting and bundling were added to the communication processing systems for customers, companies faced issues such as malfunctioning speed, correctness, price, and client satisfaction in different areas. The wrong operation leads to an absolute refusal of the company's communication flow and, thus, the further rise in operational expenses due to this method.

Efficiency, accuracy, cost-effectiveness, and customer satisfaction were the main challenges businesses faced before implementing the sorting and bundling processes in a Customer Communication Management (CCM) system. The lack of effective communication hindered smooth delivery and led to operational inefficiencies. Along with the above, businesses exhausted precious resources by mailing one document to multiple accounts at the same address. In other words, higher postage, printing, and paper costs accompanied the businesses.

The system of manual organization and preparation of communications was in use before automation. Therefore, the companies had to resort to these processes. Such manual work usually took longer and proved quite expensive, especially when managing customer data was large and complex. The distribution of paper, ink, and envelopes in the printing and mailing of individual communication for each account or family member signified the use of more material that would augment production costs.

Customers with multiple accounts or policies used to get individual letters for each, which created many problems and made things hard to deal with. When organizations didn't sort and pull together bills, statements, or notices, customers used to get many of them, which, in the end, could have been turned into only one. Due to inefficient document management, businesses often print or send duplicate documents to customers, leading to operational inefficiencies and customer dissatisfaction. Customers who received multiple documents through separate mailings had difficulty putting the information together and inadvertently overlooked an essential piece. Sometimes, errors were introduced when humans were responsible for time-consuming and tedious tasks like Sorting. When it comes to issues arising from improper handling of sensitive or strictly regulated communications, it leads to higher legal consequences. A case in point is sending a legal or compliance-related document to an incorrect customer, leading to compliance violations and possible legal actions.

Organizations started adopting sorting and grouping operations provided by CCM tools to overcome the abovementioned issues. Using these features, businesses can efficiently manage these issues, thus getting more efficient operations, a higher rate of customer satisfaction, and a reduction in the cost of production.

### **Implementing the Sorting and Bundling Process**

When an organization shares printed communications (e.g., bank statements, insurance policy updates, or account notifications), these communications go through several steps before reaching the customer. Sorting and bundling are integral components in this process, ensuring that each customer gets the correct and consolidated communications, often for multiple family members or accounts.

#### **Data Collection**

The first step in the sorting and bundling process is to analyze the data and decide on the fields after taking details from the business. This step determines which fields the sorting and bundling of customer communication will be based on. Unique data items include customer names, addresses, account numbers, family members, and contact preferences. Once the data items are fixed, communications must be sorted, and bundles are decided based on the values of the above fields. Documents like bills, invoices, and promotions offers undergo sorting, and bundling is decided.

#### **Sorting and Bundling**

Sorting involves organizing and prioritizing the communications before they are sent out. The sorting criteria can vary depending on the type of communication and the customer's specific needs once the requirements for sorting and bundling are defined. Depending upon the CCM tool, configurations are made to perform the sorting and bundling process. Logic is defined to complete the bifurcation of the outputs, sorting the data depending upon fields, and updating output properties to implement sorting processes. Sorting logics are added to the code based on the fields. The system can identify shared addresses for families and consolidate multiple communications for different family members or accounts into one delivery. Bundling refers to grouping sorted communications into a single package for delivery, reducing waste and improving customer convenience. For customers with multiple accounts or policies, the system bundles all relevant communications (e.g., bills, offers, updates) for all accounts into one package. This is common in banking, insurance, and utilities. For families or households, documents for all family members (e.g., a parent's and child's insurance policy statements or a family's bank statements) are bundled into one envelope. A family of four with insurance policies for each member might receive a single envelope containing policy updates for

each family member, along with a general family health plan update, all grouped.

#### Printing

Once the communications are sorted and bundled, they are prepared for printing and mailing. After that, the documents are formatted explicitly to fit into a standardized layout for printing and ensure that all the information is correctly placed on the page. All the documents are personalized with the customer's details, such as their name, account number, or any specific messages that are relevant to them. The sorted and bundled documents are placed into an envelope (or a mail package) with the required items. Several computers accept tracking codes, barcodes, or other identifiers to assist in tracking mail and the postal system.

#### Communication distribution.

Before being sent by official mail, a quality control procedure ensures all the necessary documents have been put in the correct envelopes. After bundling, sorting, and quality control, the last step is the dispatch to the postal service of the communication package that will later reach the customers. The messages in the package are dispatched in the agreed way (e.g., Overnight delivery, postal service), and the accompanying tracking information is usually generated to keep track of this item throughout the delivery process.

### **Benefits of adapting sorting and Bundling**

#### **Cost Reduction**

Bundling and sorting are ways companies bring into one a single envelope or packaging unit, which makes for much lower postage, paper, and mailing means. However, by cutting the number of incoming mailing items to a single customer, the business could save money for the supplier and the delivery company. Instead of printing out various separate communications, bundling reduces the number of prints, which causes resources to be saved on paper, ink, and other printing materials. Sorting and bundling not only minimize the manual labor needed for sorting and preparing the individual mailings but also reduce the need for staff time and resources, thus making optimal operation efficiency.

#### **Improved Efficiency**

The sorting and bundling processes help to spend less time on manual handling, thus speeding the document preparation and distribution. It makes the operational workflow better overall. Automated CCM with a sorting and bundling system is much quicker than doing these things manually, and thus, the documents are correctly distributed to customers on time and without errors. Automation minimizes human mistakes during the sorting and bundling process so the customers get the proper documents in the correct order. Hence, the correctness and reliability of document handling are improved.

#### **Customer Experience**

Customers receive less frequent mailings, each brief containing all the necessary information. Customers get all the required information in one package instead of multiple letters for different accounts, statements, or policies. This simplifies their experience and helps them manage their communications more efficiently. Sorting helps them get the most relevant document's custom to their needs or accounts. In addition, bundling can result in a more custom-tailored and well-coordinated communication package, which leads to customer satisfaction and product improvements through this mechanism. Sorting the documents and sending them as a bundle ensures that customers will not miss or lose any of them because the process is efficient. When several messages for one client are linked in a bundled document, it ensures that all information is sent simultaneously instead of split across several mailings.

#### **Improved Document Management**

Businesses can optimize their document handling by efficient communication and document organization. The combination of the digital and physical space can drastically be decreased, leading to a more organized and efficient archiving and retrieval process. Sorting and bundling document files boost management control and enhance visibility over the communication lifecycle, beginning with sending and delivery.

### **Regulatory Compliance and Risk Mitigation**

The proper communication is guaranteed to be received by the correct customer, which, in turn, lowers the probability of the data being sent to the wrong customer or even sent to a completely different customer. Many areas (like the financial sector, insurance companies, and medical services) must transmit documents set up per the lawful and regulatory requirements. By sorting and bundling, firms ensure that all necessary legal disclaimers, privacy notices, and compliance information are included in the correct communication package.

### **Better Resource Allocation**

By minimizing human intervention, staff members have the time to perform tasks of a higher value nature, which could be posed, e.g., dealing with customer inquiries or handling more complex communications instead of sorting and bundling documents. Sorting and bundling of materials are almost always done using CCM automation systems. Thus, manual efforts are reduced, and most technology is used. Therefore, the efficiency of business is increased. This enables the most effective use of resources on every business issue.

### **Environmental Benefits**

Through the consolidation of communications and the elimination of the transmission of repeated or several letters, companies lessen their paper usage. The result of this is the achievement of sustainability and the decrease of the environmental impact of communicative processes. As a result, the sorting and bundling process results in the use of fewer envelopes, labels, and other packaging materials, thus leading to the reduction of waste and the improvement of environmental stewardship.

### **Increased Customer Retention**

When businesses simplify their communication, this is particularly important, significantly when it lessens the number of mail they receive while maintaining or enhancing the relevance and personalization of the communication. The company and the customer feel off if the opposite result is achieved. Customers' everyday experiences become highly positive with the brand.

### **Conclusion**

The sorting and bundling process in **Customer Communication Management (CCM)** systems is vital for organizing large communication volumes, particularly when multiple family members or accounts are involved. By leveraging automation and intelligent systems, organizations like banks or insurance companies can ensure that all the necessary documents for each customer or family are correctly sorted, bundled, and delivered in an efficient, cost-effective, and customer-friendly. This process saves time, reduces costs, and enhances customer experience by providing relevant and consolidated communications in a single package.

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