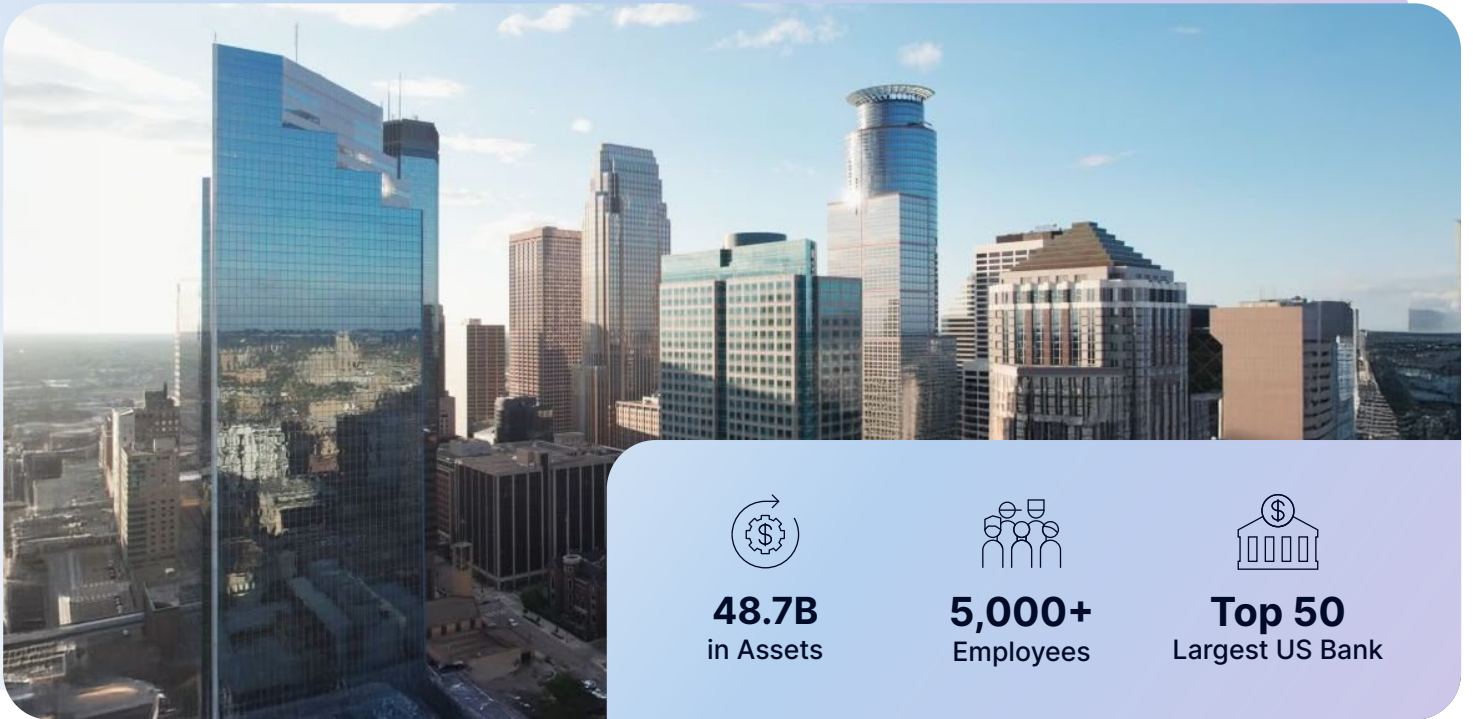


Modernizing Mail & Logistics Operations

How American Financial Institution Optimized Mail Processes, Enhanced Security, & Scaled Confidently with LogisticsOS



48.7B
in Assets



5,000+
Employees



Top 50
Largest US Bank

The Landscape

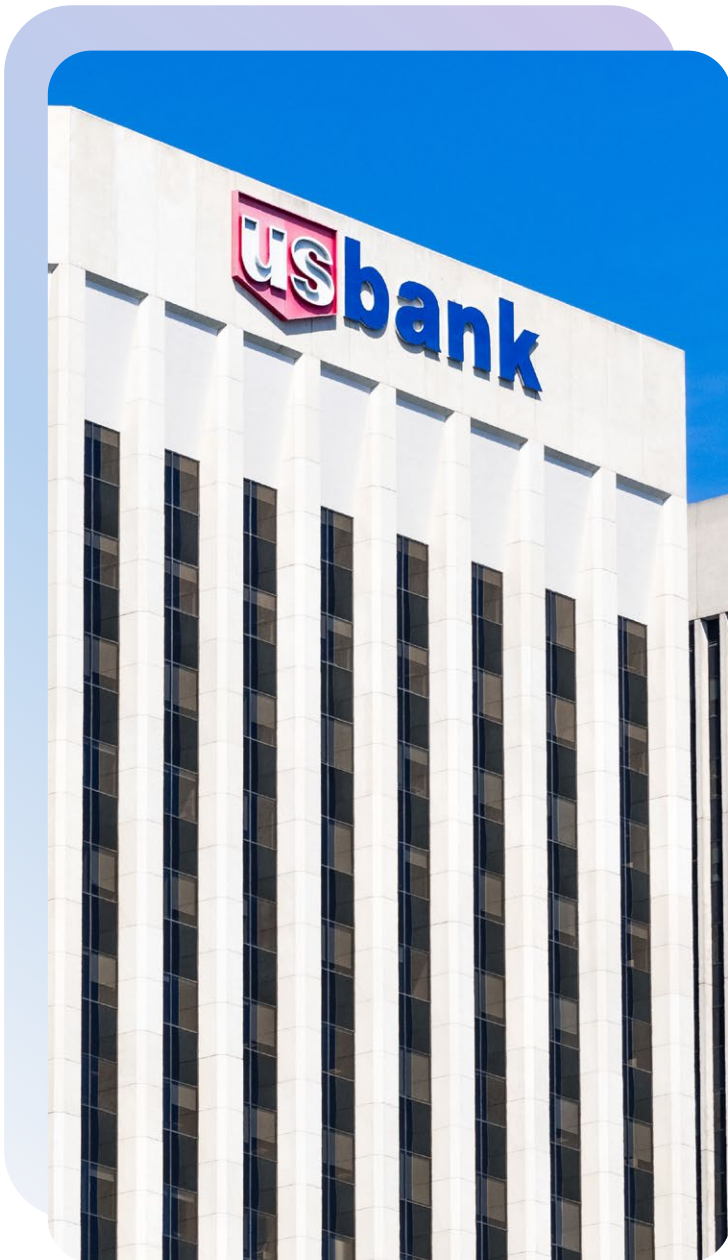
Offering a wide range of banking, investment, and insurance products, this prominent bank is known for managing finances, growing wealth, and protecting assets. The financial institution was seeking to expand its digital transformation branch-wide enabling them to securely and efficiently track critical assets, but first had to overcome obstacles preventing them from scaling operations.

The Challenge

The institution was at a crossroads with its mail tracking and operations software. Their legacy system lacked industry-specific features, integration capabilities, and scalability required to support their statewide operations. More critically, it introduced compliance risks around chain of custody, security, and accountability for branch bags, mail, and asset tracking. Recognizing the need for a more robust and future-ready solution, the financial institution knew it was time for a change.

The Journey

The Texas bank set out to find a scalable, efficient, and robust reporting solution that would meet compliance standards and help them streamline mail processes across all branches. They needed an asset and logistics management solution that could track accountable mail, branch bags, and internal assets while enhancing reporting and integration capabilities with their existing systems.



The financial institution needed a solution to address these main challenges:



**Scaling Mail Processes
Across All Branches**



**Integrating with Existing
Systems**



**Asset Tracking and
Reporting for Compliance**

The Solution

The financial institution decided to implement FacilityOS's asset and logistics management solution, LogisticsOS. They chose LogisticsOS for its robust logistics processes, integration capabilities, customer service, and digital security enhancements. LogisticsOS provided the institution with a solution tailored to their unique challenges, helping them successfully roll out a logistics digital transformation process across its 200+ locations.

FacilityOS's onboarding team provided the institution with 26 mail center workstations and 190 offices with web service request forms (SRF) for asset tracking across their

branches. Implementing LogisticsOS allowed them to focus on comprehensive tracking, reporting, and enhanced digital security, enabling them to scale confidently.

The Benefits

After LogisticsOS was implemented and employees were onboarded, the bank was able to scale their business with more streamlined mail operations across all locations.

- **Reduced Labor Time:** The Texas bank significantly reduced labor time required for its processes. By streamlining asset tracking and automated notifications across branches, they optimized communication and multi-location logistics overnight.
- **Enhanced Tracking:** LogisticsOS offered a solution tailored to their unique challenges, streamlining their essential tracking operations.
- **Improved Compliance:** The bank improved compliance with LogisticsOS's robust tracking and reporting capabilities. This enabled them to have a clear chain of custody, improve the security of their assets, and improve asset and mail accountability.

Conclusion

Implementing LogisticsOS as their logistics management system, the financial institution is now confidently positioned to continue enhancing its mail operations and scale its business.

What Can FacilityOS Do For You?

See LogisticsOS in Action



- ✓ Streamline Mailroom Management
- ✓ Optimize Central Receiving
- ✓ Automate Asset Management
- ✓ Enable Intelligent Logistics Workflows

[Request a Demo](#)