

Agency Assist brings efficiency and automation to business-critical mailings.

Client profile

Agency Assist
agencyassist.net

- Manages lien letters, tax certificates and other documents required in real estate closings
- Provides clients with municipality-specific intelligence about rules and requirements



Overview

Processing property titles in Pennsylvania is a complex business. The state includes nearly 2,600 municipalities, each with its own requirements for lien letters, tax certificates and other documents needed to close on a property sale. That is where Agency Assist comes in. The firm's mission is to streamline getting those documents to title companies and law firms. When Agency Assist needed assistance keeping up with the volume of mailings, it turned to Pitney Bowes.

Business challenge

"Each request for a lien letter or tax certificate is several pages long, and it goes out with a check and a return envelope," explains Mark Neroni, COO of Agency Assist. "Previously, we would print checks, letters and forms; manually bundle them together and stuff the envelopes; then print the postage, lick and seal. We were looking to automate so we could take some of that work off the two employees who were handling mailings."

Agency Assist reached out to several service providers. Pitney Bowes was among the candidates, in part because Agency Assist was using a Pitney Bowes SendPro® P1000 mailing machine, OMATION® 210 letter opener and HP PageWide printer, and was happy with the relationship.

"We have not gotten much feedback since deploying OL Connect — which is a good thing. We are getting fewer calls about errors. Our mailings are running very smoothly now."

— Christi Neroni, President, Agency Assist

Christi Neroni, President of Agency Assist, says some of the providers her firm considered "didn't take the time to understand what we were doing. They tried to fit us into their standard template." By contrast, she says, "Pitney Bowes really understood what we needed and presented a variety of solutions. We felt so comfortable with the team and solution that we decided to implement OL Connect software."

Technology used

- Relay® 5000
- SendPro® P1000
- OMATION® Series 210
- OL™ Connect
- ConnectRight® Mailer
- TrackMyMail®

Services used

- Pitney Bowes Professional Services

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— Mark Neroni, COO, Agency Assist

Solution

Customers use the Agency Assist website to enter data for the documents they need. “When they place the order online, they give us property information: whether it’s a purchase or refinance, whether it has well and septic, etc.,” Mark says. Data flows from the web form into proprietary software that also incorporates the requirements of each municipality.

The Pitney Bowes Professional Services team designed a solution that leverages this information to automate document collection and processing, and developed 2D barcodes for use by a Pitney Bowes Relay® 5000 inserter. Now, data flows from Agency Assist’s proprietary system into the OL™ Connect platform, which prints the appropriate letters, forms and checks. Then, Agency Assist staff transfer pages and envelopes to the inserter.

“OL Connect adds a barcode to each page during printing,” Christi says. “The inserter sorts pages using the barcodes, folds them, and places them in the correct window envelope. We move them to the Pitney Bowes postage machine to seal and post, and out the door they go.”

The Professional Services team also developed a mechanism for double-checking mailing details. “If things don’t match, OL Connect shows us there’s something wrong,” Mark says. “For example, if a check is made out for the wrong amount or to the wrong person, or if the place where a document is being sent doesn’t match what’s on the document, OL Connect will pick that up.”

Benefits

The new process saves nearly three and a half hours of staff time daily.

“Previously, we had two staff members spending two hours each on these mailings every day,” Mark says. “Now, it takes them about 20 minutes to do a print run.” This improved efficiency has enabled Agency Assist to grow without adding headcount. It has also boosted the firm’s staffing flexibility. For example, “we are currently down an employee due to illness, and the people that handle mailings have been able to pick up some of that employee’s workload,” Mark reports.

OL Connect software has also improved the accuracy of mailings. “Previously, we sometimes had trouble with letters and checks not being matched up properly due to human error,” Christi says. “Also, sometimes municipalities would lose either our checks or our requests because they were separate documents. Now, OL Connect prints the check on the bottom of the letter. That not only saves paper, but also cuts down on mistakes.”

Finally, Pitney Bowes Professional Services deployed ConnectRight® Mailer and TrackMyMail® solutions so that Agency Assist can validate delivery for each mailing. The end result is happier clients. “We have not gotten much feedback since deploying OL Connect — which is a good thing,” Christi says. “We are getting fewer calls about errors. Our mailings are running very smoothly now.”



For more information,
visit us online:
pitneybowes.com/us



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