



2017 Annual Mail Industry Survey

Created by Idealliance in cooperation with:

Alliance of Nonprofit Mailers

American Catalog Mailers Association

Association for Mail Electronic Enhancement

Association for Postal Commerce

Envelope Manufacturers Association

National Association of Presort Mailers.

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About the 2017 Mail Survey Lead Development Group

Postal Operations & Technologies Council

Idealliance – with its Postal Operations & Technologies Council and 11 other mail and postal work groups and task teams – is an active and positive force for change and development in the mail supply chain.

Mail and postal issues are at the core of Idealliance's visual communications and media membership, which includes catalog and direct marketers, equipment manufacturers, fulfillment companies, list management companies, logistics companies, mail preparers, mail owners, manufacturers, printers, publishers, software developers, and transportation carriers. Our members produce more than 60 billion pieces of mail each year, making Idealliance their association leader, focusing on technology, operations, and the supply chain, while working collaboratively with the U.S. Postal Service to meet the new challenges of mail preparation and distribution. We advance initiatives through a member-led council called the Postal Operations & Technologies Council (POTC). The 2017 Mail Survey was developed through the work of POTC. POTC has developed six fundamental strengths:

1. Represent all classes and shapes throughout the visual communications and digital media industry to connect the dots across the supply chain;
2. Engage all partners in the supply chain in an open environment focusing on total combined costs;
3. Advance expertise in establishing and developing industry specifications and best practices—for more than 20 years, Idealliance has annually developed and published the Mail.dat[®] and Mail.XML[™] specifications that define mail preparation for the industry and the Postal Service;
4. Create and distribute education and certification programs, including a newsletter to inform members on all things postal;
5. Serve as an acknowledged expert and innovator in Postal Service networks, products, and services, as well as industry supply chain technologies and workflows; and
6. Coordinate and fuse print-digital to maximize communications and commerce using our leadership in information technologies.

Co-Chairs

- Rose Flanagan, Manager of Postal Strategies & Logistics, Data-Mail
- Phil Thompson, Director of Postal Affairs, Quad/Graphics, Inc.

Research Programs of Idealliance

The 2017 Mail Survey and Report were compiled by Idealliance Chief Economist Andrew Paparozzi, whose industry economic and trends research includes the State of the Industry Report and State of the Industry Updates, and specialized studies such as the current industry Capital Investment Survey. Paparozzi also developed and manages Idealliance's proprietary Leading Indicators web-based financial benchmarking program. For information on Idealliance industry research, call (703) 837-1062 or email apaparozzi@idealliance.org.

Foreword

The vast and complex supply chain stretching from paper production to the moment the mailpiece is delivered represents a graphic communications industry that translates into \$1.4 trillion annual GDP, 7.5 million jobs, and contributes annual revenues of \$154 billion to the U.S. Postal Service. In between are mail owners and marketers, mail processing operations, mail service providers (MSPs), logistics experts, transportation providers, printers, software developers, creative and marketing service providers, and data and list managers—each essential in getting the hard-copy communication (along with increasingly digital and integrated media) to its intended recipient.

Like all interdependent industries, the postal supply chain works best when each component recognizes the importance of collaborating and cooperating with others in the chain to achieve the greatest mutual benefit. Working together to provide the best possible product at the lowest possible price enhances the value of mail, which benefits both consumers and every link in the supply chain.

The 2017 Annual Mail Industry Survey focuses on the relationship between the Postal Service—the primary source of printed product delivery—and a number of links in the chain, including mail owners, printers, transportation and logistics providers, software companies, and MSPs. The survey confirms how important collaboration across the supply chain is to these operations. In particular, survey respondents consistently rated effective communication—especially about changes to overall strategy, processes or procedures, technology, or pricing—as paramount to achieving optimum collaboration and operations for the industry as a whole.

Effective communication, we learned in this survey, requires providing advance information about a change in focus or policy, or other disruption to the status quo—and the earlier the better. Just as important, many survey respondents think the Postal Service should make a greater effort to seek input from other links in the supply chain about how its prospective changes will affect their operations and use of the USPS. Getting feedback and insights at the planning and early development stages—through actual development and launch—from all types of operations that will be affected will contribute to greater success for the supply chain as a whole.

We hope the 2017 Mail Industry Survey will prove to be a valuable and constructive tool in improving the relationship and partnership with the U.S. Postal Service and among all mail supply chain partners.



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Introduction

This report summarizes results of the 2017 Annual Mail Industry Survey. The survey was created by Idealliance, with valuable input from the United States Postal Service, and conducted in cooperation with the Alliance of Nonprofit Mailers, the American Catalog Mailers Association (ACMA), the Association for Mail Electronic Enhancement (AMEE), the Association for Postal Commerce (PostCom), the Envelope Manufacturers Association (EMA), and the National Association of Presort Mailers (NAPM). Responses were collected from mid-February through late March 2017.

Participants were asked about a number of critical issues, including their overall experience with the USPS, how satisfied they are with major USPS program systems, and how the USPS can be an even better business partner. Their candid, thoughtful responses establish a baseline measure of the mail supply chain's current efficiency and show how efficiency can be improved even further.

Future surveys in this series will measure progress from the baseline.* Where have we progressed most? How did we do it? Where do we most need to improve? How best to make those improvements? The answers will keep us moving closer to the streamlined, ultra-efficient mail supply chain essential to our industry's success.

Who Participated

A total of 202 individuals from across the mail supply chain participated in this year's survey. More than two-fifths (43.3%) identify their company's primary function as mail service provider. Print provider is the primary function of 13.4%, mail owner of 11.0%, and software provider of 9.1%. "Other" mainly includes respondents who define their companies as some combination of print provider, mail service provider, and marketing service provider, with no one of the three being "primary."

What is your organization's PRIMARY function?

Response	Percent	Response	Percent
Mail Service Provider (including lettershops and presort houses)	43.3%	Logistics & Transportation Services	4.9%
Print Provider	13.4%	Order Fulfillment Services	1.8%
Mail Owner	11.0%	Data and Analytics	1.2%
Software Provider	9.1%	Production Agency	1.2%
Marketing Services Provider/Creative and Design Services	6.1%	Other	7.9%

** Because questions and rating scales were changed significantly to better measure mail supply chain efficiency, results of this year's survey and last year's are not directly comparable.*

Ownership/management is the primary work responsibility for more than one-third (36.0%) of our survey group and postal/government affairs for nearly one-fifth (18.0%). Slightly less than 14.0% are primarily responsible for production (presorting, mail production, etc.) and slightly less than 6.0% for mail production planning. Client services, including sales, are the primary responsibility for 8.1%. Software development is the primary responsibility for 5.6% and software integration for 1.2%.

What is your PRIMARY function at work?

Response	Percent	Response	Percent
Owner/Management (CEO, vice president, general manager, etc.)	36.0%	Software Development	5.6%
Postal/Government Affairs	18.0%	Logistics & Transportation Planning	2.5%
Production (presorting, mail production, etc.)	13.7%	Software Integration	1.2%
Client Services (including sales)	8.1%	Creative/Design	0.6%
Mail Production Planning	5.6%	Other	8.7%

All participants are members of at least one of our industry's associations and 60.1% are members of at least two. Nearly 69.0% are Idealliance members. Next come PostCom (35.0%), NAPM (23.3%), and DMA (23.3%). "Other" includes associations and professional groups such as the Postal Customer Council, the American Marketing Association, Mailers Hub, and the National Print Owners Association.

To which associations do you currently belong?

Response	Percent	Response	Percent
Idealliance	68.7%	AMEE (Association for Mail Electronic Enhancement)	11.0%
PostCom (Association for Postal Commerce)	35.0%	MMA (Mobile Marketing Association)	7.4%
NAPM (National Association of Presort Mailers)	23.3%	MPA (Association of Magazine Media)	6.7%
DMA (Data & Marketing Association)	23.3%	Alliance of Nonprofit Mailers	5.5%
PIA (Printing Industries of America)	16.0%	EMA (Envelope Manufacturers Association)	3.7%
ACMA (American Catalog Mailers Association)	12.9%	PSA (Parcel Shippers Association)	3.1%
NPPC (National Postal Policy Council)	12.9%	Other	8.0%

What We Learned

The core of the 2017 Annual Mail Industry Survey consisted of 10 questions. One asked participants to rate their overall satisfaction with the USPS, eight dug into specific aspects of the relationship, and one encouraged them to share anything else they wanted to about the mail supply chain. The exact questions in the order asked and a summary of our survey group's responses follow. Results are presented for all participants, service providers (mail service providers, mail owners, print providers, marketing services providers, and production agencies), mail owners, and software providers.

Overall Satisfaction with the USPS

Our opening question asked participants to rate their overall experience with the USPS as a partner and supplier within the mail supply chain. We used a seven-point scale, ranging from “very satisfied” to “very dissatisfied,” for the ratings. Although only 4.6% are very satisfied, 41.0% are mostly satisfied and 25.7% are somewhat satisfied, resulting in a total satisfaction score of 71.3%. In contrast, just 17.9% are dissatisfied and 10.8% are neither satisfied nor dissatisfied.

Please rate your overall experience with the USPS as a partner and supplier within the mail supply chain.

Response	All	Mail Owners	Software Providers
Very satisfied	4.6%	0.0%	6.2%
Mostly satisfied	41.0%	44.4%	37.5%
Somewhat satisfied	25.7%	22.2%	18.8%
Neither satisfied nor dissatisfied	10.8%	16.7%	12.5%
Somewhat dissatisfied	11.3%	16.7%	12.5%
Mostly dissatisfied	5.6%	0.0%	12.5%
Very dissatisfied	1.0%	0.0%	0.0%

Use of USPS Program Systems

Our next question listed 22 USPS program systems and asked for each if participants have used the system and, if they have, how recently. Results are summarized on page 7.

Highlights

1. Practically all have used usps.com (98.4%), Domestic Mail Manual (96.3%), Postal Explorer (94.7%), and Rapid Information Bulletin Board System (94.6%). Moreover, each has been used by more than 80.0% of our survey group within the past six months.
2. More than four-fifths have used PostalOne! (92.4%), Business Customer Gateway (90.1%), and Full-Service Intelligent Mail (86.9%), with each used by large majorities within the past six months.
3. Between 79.3% and 69.3% have used Centralized Account Processing System (79.1%), Facility Access & Shipment Tracking (73.6%), Mailpiece Tracking (71.3%), Address Change Services (70.9%), Postal Pro (69.9%) and IMb Tracking (69.3%). All except Address Change Services have been used by a majority in the past six months.
4. Between half and two-thirds have used eInduction (64.3%), a USPS assessment process (61.4%), Container, Tray, and Bundle Visibility (60.8%), Incentive Enrollment (58.8%), Electronic Verification System (58.7%), and Every Door Direct Mail (55.2%). Use during the last six months varies from 59.3% for eInduction to 26.8% for Every Door Direct Mail.
5. Only minorities have used Address Management Service (47.2%), Product Tracking & Reporting (41.8%), and Shipping Services Enrollment (40.7%), with 27.3%, 26.6%, and 16.9%, respectively, using those services during the past six months.

When did you last use the following or data from the following?

ALL PARTICIPANTS				
Program System	Have Used	Past 6 Months	7 to 12 Months Ago	More Than 1 Year Ago
usps.com	98.4%	91.5%	4.8%	2.1%
Domestic Mail Manual (DMM)	96.3%	87.9%	4.7%	3.7%
Postal Explorer (pe.usps.com)	94.7%	86.7%	2.1%	5.9%
Rapid Information Bulletin Board System (RIBBS)	94.6%	82.8%	7.0%	4.8%
PostalOne!	92.4%	84.2%	4.3%	3.8%
Business Customer Gateway	90.1%	83.8%	1.6%	4.7%
Full-Service Intelligent Mail	86.9%	79.8%	2.7%	4.4%
Centralized Account Processing System (CAPS)	79.1%	68.1%	5.5%	5.5%
FAST (Facility Access & Shipment Tracking)	73.6%	60.4%	6.0%	7.1%
Mailpiece Tracking	71.3%	59.0%	4.5%	7.9%
Address Change Service (ACS)	70.9%	47.8%	9.9%	13.2%
Postal Pro	69.9%	60.8%	5.1%	4.0%
IMb Tracing	69.3%	56.3%	6.8%	6.3%
eInduction	64.3%	59.3%	3.3%	1.6%
Any Assessment Process	61.4%	51.1%	6.8%	3.4%
Container, Tray and Bundle Visibility	60.8%	51.1%	4.5%	5.1%
Incentive Enrollment	58.8%	39.0%	7.7%	12.1%
Electronic Verification System (EVS)	58.7%	46.4%	7.3%	5.0%
Every Door Direct Mail (EDDM) Tool	55.2%	26.8%	12.0%	16.4%
Address Management Service (AMS)	47.2%	27.3%	8.0%	11.9%
Product Tracking & Reporting (PTR)	41.8%	26.6%	8.5%	6.8%
Shipping Services Enrollment	40.7%	16.9%	9.9%	14.0%

Satisfaction by Step in Mail and Shipment Processing

A closer look at satisfaction with the USPS—and a first look at areas for improvement—began when we asked our survey group to rate their experiences at each of seven steps in mail and shipment processing. We again used a seven-point rating scale, running from “very satisfied” to “very dissatisfied.” Results are summarized on pages 9-10. Although scores varied significantly from step to step, each step received “satisfied” ratings—whether very, mostly, or somewhat—from a majority of companies surveyed.

Highlights

1. Payment had the highest satisfaction score, at 75.5%, with 12.6% very satisfied, 48.4% mostly satisfied, and 14.5% somewhat satisfied.
2. Onboarding, induction, and verification all had satisfaction scores between 71.4% and 68.3%. As with payments, “mostly satisfied” accounted for the highest percentage of ratings.
3. Tracking had a satisfaction score of 64.8%, with 12.6% very satisfied, 29.6% mostly satisfied, and 22.6% somewhat satisfied.
4. Finding information and issue resolution had the lowest satisfaction scores, 57.1% and 55.9%, respectively, and the highest dissatisfaction scores, 29.7% and 34.0%, respectively, of the steps evaluated.
5. Only small minorities, ranging from just 3.2% for payment to 17.8% for issue resolution, were either very dissatisfied or mostly dissatisfied with the USPS at any of the seven stages.

How satisfied are you with the USPS during the following steps in mail and shipment processing?

ALL RESPONDENTS							
Step	Satisfied			Neither Satisfied Nor Dissatisfied	Dissatisfied		
	Very	Mostly	Somewhat		Somewhat	Mostly	Very
Payment	12.6%	48.4%	14.5%	15.6%	5.7%	1.9%	1.3%
Tracking	12.6%	29.6%	22.6%	18.2%	11.3%	3.8%	1.9%
Induction	11.3%	40.0%	18.7%	16.7%	9.3%	4.0%	0.0%
Verification	11.0%	40.2%	17.1%	15.2%	10.4%	4.9%	1.2%
Finding Information	6.0%	26.9%	24.2%	13.2%	15.4%	9.9%	4.4%
Issue Resolution	6.0%	23.6%	26.3%	10.1%	16.2%	11.7%	6.1%
Onboarding	5.6%	41.7%	24.1%	14.7%	6.5%	7.4%	0.0%

SERVICE PROVIDERS

Step	Satisfied			Neither Satisfied Nor Dissatisfied	Dissatisfied		
	Very	Mostly	Somewhat		Somewhat	Mostly	Very
Payment	15.6%	48.6%	14.7%	12.9%	5.5%	1.8%	0.9%
Verification	12.7%	40.9%	18.2%	12.8%	10.0%	4.5%	0.9%
Tracking	10.6%	28.8%	25.0%	16.4%	12.5%	3.8%	2.9%
Induction	10.1%	43.4%	20.2%	13.1%	8.1%	5.1%	0.0%
Issue Resolution	5.1%	23.7%	23.7%	11.1%	16.9%	13.6%	5.9%
Finding Information	5.0%	27.3%	26.4%	14.9%	14.0%	8.3%	4.1%
Onboarding	4.1%	43.2%	28.4%	12.1%	5.4%	6.8%	0.0%

How satisfied are you with the USPS during the following steps in mail and shipment processing?

MAIL OWNERS

Step	Satisfied			Neither Satisfied Nor Dissatisfied	Dissatisfied		
	Very	Mostly	Somewhat		Somewhat	Mostly	Very
Tracking	7.7%	23.1%	30.8%	15.3%	23.1%	0.0%	0.0%
Onboarding	0.0%	36.4%	27.3%	27.2%	9.1%	0.0%	0.0%
Payment	0.0%	56.3%	12.5%	12.4%	12.5%	0.0%	6.3%
Verification	0.0%	38.5%	30.8%	15.3%	15.4%	0.0%	0.0%
Induction	0.0%	45.5%	27.3%	18.1%	9.1%	0.0%	0.0%
Finding Information	0.0%	18.8%	37.5%	6.1%	6.3%	25.0%	6.3%
Issue Resolution	0.0%	12.5%	31.3%	0.0%	31.3%	18.6%	6.3%

SOFTWARE PROVIDERS

Step	SATISFIED			Neither Satisfied Nor Dissatisfied	Dissatisfied		
	Very	Mostly	Somewhat		Somewhat	Mostly	Very
Tracking	25.0%	33.3%	16.7%	25.0%	0.0%	0.0%	0.0%
Finding Information	15.4%	23.1%	0.0%	23.1%	15.4%	15.4%	7.7%
Onboarding	12.5%	37.5%	25.0%	12.5%	12.5%	0.0%	0.0%
Induction	12.5%	25.0%	25.0%	37.5%	0.0%	0.0%	0.0%
Issue Resolution	8.3%	25.0%	16.7%	25.0%	16.7%	8.3%	0.0%
Payment	0.0%	66.7%	0.0%	16.7%	16.7%	0.0%	0.0%
Verification	0.0%	44.4%	11.1%	33.3%	11.1%	0.0%	0.0%

Satisfaction With Critical USPS Functions

We next listed critical USPS functions such as providing an intuitive, accessible Business Customer Gateway and partnering with mailing industry stakeholders. Participants were asked to rate the USPS “excellent,” “good,” “fair,” or “poor” on each. The five functions receiving the highest “excellent” percentages are listed below. The five with the lowest are listed on pages 13-14. Complete ratings are on pages 15-18.

Highest Excellent Percentages

All Participants	Percent
1. As a business partner	13.4%
2. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	12.7%
3. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	11.0%
4. Communicating functionality of change and enhancements to existing USPS program systems	6.6%
5. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	6.5%

Service Providers	Percent
1. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	12.8%
2. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	12.1%
3. As a business partner	11.5%
4. Communicating functionality of change and enhancements to existing USPS program systems	7.4%
5. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	5.6%

Mail Owners (Only two functions were rated “excellent”)	Percent
1. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	8.3%
2. Communicating functionality of change and enhancements to existing USPS program systems	7.1%

Software Providers	Percent
1. As a business partner	44.4%
2. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	20.0%
3. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	14.3%
4. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	12.5%
5. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	12.5%

Lowest Excellent Percentages

All Participants	Percent
1. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	5.4%
2. Understanding how their systems are used on a daily basis by business mailers	4.8%
3. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	4.3%
4. Understanding industry business models and incorporating them into USPS systems	3.4%
5. Balancing the needs of the industry and the USPS to develop USPS program systems	1.7%

Service Providers	Percent
1. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	5.2%
2. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	5.1%
3. Understanding how their systems are used on a daily basis by business mailers	5.0%
4. Understanding industry business models and incorporating them into USPS systems	2.1%
5. Balancing the needs of the industry and the USPS to develop USPS program systems	1.1%

Mail Owners (Eight functions were rated “poor”)	Percent
1. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	0.0%
2. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	0.0%
3. Balancing the needs of the industry and the USPS to develop USPS program systems	0.0%
4. Understanding industry business models and incorporating them into USPS systems	0.0%
5. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	0.0%
6. Understanding how their systems are used on a daily basis by business mailers	0.0%
7. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	0.0%
8. As a business partner	0.0%

Software Providers	Percent
1. Balancing the needs of the industry and the USPS to develop USPS program systems	11.1%
2. Understanding industry business models and incorporating them into USPS systems	11.1%
3. Understanding how their systems are used on a daily basis by business mailers	11.1%
4. Communicating functionality of change and enhancements to existing USPS program systems	10.0%
5. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	0.0%

How would you rate the USPS on each of the following?

ALL RESPONDENTS				
Statement	Excellent	Good	Fair	Poor
1. As a business partner	13.4%	40.9%	37.0%	8.7%
2. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	12.7%	47.5%	33.1%	6.8%
3. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	11.0%	43.8%	32.9%	12.3%
4. Communicating functionality of change and enhancements to existing USPS program systems	6.6%	31.4%	44.6%	17.4%
5. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	6.5%	30.9%	44.7%	17.9%
6. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	5.4%	28.8%	41.4%	24.3%
7. Understanding how their systems are used on a daily basis by business mailers	4.8%	37.1%	40.3%	17.7%
8. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	4.3%	36.8%	47.9%	11.1%
9. Understanding industry business models and incorporating them into USPS systems	3.4%	25.2%	43.7%	27.7%
10. Balancing the needs of the industry and the USPS to develop USPS program systems	1.7%	35.8%	47.5%	15.0%

How would you rate the USPS on each of the following?

SERVICE PROVIDERS					
Statement	All Respondents Rank	Excellent	Good	Fair	Poor
1. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	2	12.8%	48.9%	31.9%	6.4%
2. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	3	12.1%	44.8%	31.0%	12.1%
3. As a business partner	1	11.5%	41.3%	39.4%	7.7%
4. Communicating functionality of change and enhancements to existing USPS program systems	4	7.4%	31.6%	44.2%	16.8%
5. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	6	5.6%	27.8%	41.1%	25.6%
6. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	8	5.2%	38.1%	45.4%	11.3%
7. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	5	5.1%	32.7%	45.9%	16.3%
8. Understanding how their systems are used on a daily basis by business mailers	7	5.0%	37.6%	41.6%	15.8%
9. Understanding industry business models and incorporating them into USPS systems	9	2.1%	25.3%	46.3%	26.3%
10. Balancing the needs of the industry and the USPS to develop USPS program systems	10	1.1%	36.8%	50.5%	11.6%

How would you rate the USPS on each of the following?

MAIL OWNERS					
Statement	All Respondents Rank	Excellent	Good	Fair	Poor
1. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	6	8.3%	25.0%	50.0%	16.7%
2. Communicating functionality of change and enhancements to existing USPS program systems	4	7.1%	35.7%	50.0%	7.1%
3. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	3	0.0%	12.5%	50.0%	37.5%
4. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	2	0.0%	50.0%	41.7%	8.3%
5. Balancing the needs of the industry and the USPS to develop USPS program systems	10	0.0%	46.2%	46.2%	7.7%
6. Understanding industry business models and incorporating them into USPS systems	9	0.0%	30.8%	46.2%	23.1%
7. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	5	0.0%	41.7%	50.0%	8.3%
8. Understanding how their systems are used on a daily basis by business mailers	7	0.0%	38.5%	53.8%	7.7%
9. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	8	0.0%	41.7%	58.3%	0.0%
10. As a business partner	1	0.0%	42.9%	50.0%	7.1%

How would you rate the USPS on each of the following?

SOFTWARE PROVIDERS					
Statement	All Respondents Rank	Excellent	Good	Fair	Poor
1. As a business partner	1	44.4%	22.2%	11.1%	22.2%
2. Aligning documentation (i.e., DMM, Publications, and Guides) with the actual behavior of USPS program systems	5	20.0%	20.0%	50.0%	10.0%
3. Providing a testing onboard environment (i.e., TEM and pre-Prod) to meet industry needs	3	14.3%	42.9%	42.9%	0.0%
4. Providing a Business Customer Gateway that is intuitive and allows me to quickly access the USPS applications I use most often	2	12.5%	25.0%	50.0%	12.5%
5. Making the industry aware of how customer data is being secured, what is being acquired, and how it is being used	6	12.5%	62.5%	12.5%	12.5%
6. Balancing the needs of the industry and the USPS to develop USPS program systems	10	11.1%	22.2%	22.2%	44.4%
7. Understanding industry business models and incorporating them into USPS systems	9	11.1%	44.4%	0.0%	44.4%
8. Understanding how their systems are used on a daily basis by business mailers	7	11.1%	33.3%	22.2%	33.3%
9. Communicating functionality of change and enhancements to existing USPS program systems	4	10.0%	30.0%	40.0%	20.0%
10. Providing stable computer systems with response times and system uptimes that meet the needs of my organization	8	0.0%	50.0%	37.5%	12.5%

Program System Ratings: Functionality, Data Report Quality, and Ease of Use

We first asked our survey group which USPS program systems they've used and how recently they've used them. We then asked them to rate each system on three dimensions: functionality, data report quality, and ease of use/user support documentation. We employed the "excellent," "good," "fair," or "poor" scale and included an "NA" option for participants who were not familiar enough with a program system to rate it. (They may have used the system, but not frequently or extensively enough to feel comfortable rating it.)

As the table below shows, familiarity varies widely from system to system. For example, 95.7% of our survey group were familiar enough to rate PostalPro/RIBBS and 92.0% PostalOne!, while just 27.5% could rate Informed Delivery and 26.0% eVS/Product Tracking System. Seven systems were rated by less than half of all companies surveyed and 13 by less than two-thirds.

Total ratings across all three dimensions are on page 21. Ratings for functionality are on page 22, data report quality on page 23, and ease of use on page 24.

Program Systems	Familiar Enough to Rate	Program Systems	Familiar Enough to Rate
PostalPro/RIBBS	95.7%	IMb Tracing: Legacy Piece/Tray/Pallet	62.1%
PostalOne!	92.0%	eInduction	57.9%
Full Service	86.9%	Every Door Direct Mail (EDDM) Tool	51.9%
Full Service Assessment	76.4%	eInduction Assessment	50.9%
Centralized Account Processing System (CAPS)	72.7%	Seamless Acceptance	47.6%
Facility Access & Shipment Tracking (FAST)	69.6%	Electronic Verification System (eVS)	44.8%
Label Lists including Mail Direction File	69.3%	Address Management Services (AMS)	39.8%
Mail Transport Equipment Ordering (MTEOR)	69.2%	Informed Visibility	39.6%
Address Change Service (ACS)	66.7%	Seamless Acceptance Assessment	39.4%
Move Update Assessment	65.4%	Informed Delivery	27.5%
Postal Wizard	63.8%	eVS/Product Tracking System (PTS)	26.0%

Highlights

1. **Total Score.** Excellent-to-good scores ranged from 78.9% for Centralized Account Processing System to 35.0% for Informed Visibility. In addition to CAPS, four other systems—Full Service (77.1%), Mail Transport Equipment Ordering (75.7%), Postal Wizard (71.6%), and Address Management Services (70.5%)—were rated excellent or good by more than 70.0% of our survey group. In addition to Informed Visibility, five other systems—Move Update Assessment (55.7%), Label Lists (55.8%), Seamless Acceptance Assessment (56.1%), eInduction Assessment (57.3%), and Informed Delivery (58.9%)—were rated fair or poor by a majority.
2. **Functionality.** Ten systems were rated excellent or good by more than two-thirds of respondents, with four—Centralized Account Processing System (89.0%), Full Service (80.9%), Mail Transport Equipment Ordering (77.0%), and Facility Access & Shipment Tracking (75.0%)—rated excellent or good by at least three-quarters. In contrast, eight systems were rated fair or poor by at least two-fifths and five by more than half. The systems rated fair or poor most often: eInduction Assessment (57.1%), Informed Delivery (56.7%), and Label Lists (55.7%).
3. **Data Report Quality/Level of Information.** Mail Transport Equipment Ordering, Full Service, Centralized Account Processing System, and Postal Wizard scored highest, with excellent or good ratings greater than 73.0%, while eInduction Assessment, Seamless Acceptance Assessment, Informed Delivery, and Informed Visibility scored lowest, with fair or poor ratings greater than 57.0%. In total, seven systems were rated excellent or good by at least two-thirds of respondents and seven fair or poor by a majority.
4. **Ease of Use/User Documentation.** Scores were not as strong as they were for functionality and data quality. Four systems—Full Service (75.0%), Mail Transport Equipment Ordering (73.6%), Centralized Account Processing System (72.6%), and Address Management Services (70.0%)—were rated excellent or good by 70.0% or more of our survey group. But 11 systems were rated fair or poor by a majority, including Informed Visibility, at 66.7%; Informed Delivery, at 59.3%; and Move Update Assessment, Label Lists, eInduction Assessment, and Seamless Acceptance Assessment, each at 57.4%. In comparison, five systems were rated fair or poor on functionality and seven on data report quality/level of information.

ALL PARTICIPANTS

TOTAL SCORE: Functionality, Data Report Quality/Level of Information, and Ease of Use/User Support Documentation.

Total Score	Excellent	Good	Fair	Poor
1. Full Service	17.6%	59.5%	20.1%	2.9%
2. Mail Transport Equipment Ordering (MTEOR)	15.6%	60.1%	19.7%	4.6%
3. Every Door Direct Mail (EDDM) Tool	15.0%	41.9%	28.8%	14.3%
4. Centralized Account Processing System (CAPS)	13.6%	65.3%	16.5%	4.6%
5. Postal Wizard	10.9%	60.7%	25.4%	3.0%
6. Full Service Assessment	10.8%	52.3%	27.8%	9.1%
7. PostalPro/RIBBS	10.2%	49.1%	35.3%	5.4%
8. eInduction	9.0%	54.8%	27.7%	8.5%
9. Address Management Services (AMS)	7.4%	63.1%	24.6%	4.9%
10. Facility Access & Shipment Tracking (FAST)	6.6%	58.5%	29.7%	5.2%
11. Address Change Service (ACS)	6.5%	48.1%	36.0%	9.4%
12. IMb Tracing–Legacy Piece/Tray/Pallet	6.3%	51.0%	32.3%	10.4%
13. Informed Delivery	4.7%	36.5%	36.5%	22.4%
14. Electronic Verification System (EVS)	4.2%	56.3%	29.6%	9.9%
15. PostalOne!	3.5%	57.1%	34.0%	5.4%
16. eVS/Product Tracking System (PTS)	2.5%	57.5%	31.3%	8.7%
17. eInduction Assessment	1.8%	40.9%	38.4%	18.9%
18. Label Lists including Mail Direction File	1.4%	42.8%	45.2%	10.6%
19. Move Update Assessment	1.0%	43.3%	42.9%	12.8%
20. Informed Visibility	0.8%	34.2%	52.5%	12.5%
21. Seamless Acceptance	0.7%	50.3%	32.9%	16.1%
22. Seamless Acceptance Assessment	0.0%	43.9%	30.9%	25.2%

ALL PARTICIPANTS

Functionality Only

Functionality	Excellent	Good	Fair	Poor
1. Full Service	21.3%	59.6%	17.0%	2.1%
2. Mail Transport Equipment Ordering (MTEOR)	18.9%	58.1%	20.3%	2.7%
3. Every Door Direct Mail (EDDM) Tool	14.8%	42.6%	29.6%	13.0%
4. Centralized Account Processing System (CAPS)	14.6%	74.4%	9.8%	1.2%
5. Full Service Assessment	11.3%	57.5%	22.5%	8.7%
6. eInduction	10.9%	57.8%	25.0%	6.3%
7. Address Management Services (AMS)	9.8%	63.4%	24.4%	2.4%
8. Postal Wizard	9.0%	64.2%	23.8%	3.0%
9. PostalPro/RIBBS	8.7%	59.1%	30.5%	1.7%
10. Facility Access & Shipment Tracking (FAST)	8.3%	66.7%	20.8%	4.2%
11. Address Change Service (ACS)	8.3%	51.4%	36.1%	4.2%
12. IMb Tracing–Legacy Piece/Tray/Pallet	6.3%	57.8%	28.1%	7.8%
13. Electronic Verification System (EVS)	4.2%	64.5%	25.0%	6.3%
14. PostalOne!	3.8%	61.3%	32.1%	2.8%
15. Informed Delivery	3.3%	40.0%	40.0%	16.7%
16. Seamless Acceptance	2.0%	58.0%	26.0%	14.0%
17. eInduction Assessment	1.8%	41.1%	37.5%	19.6%
18. eVS/Product Tracking System (PTS)	0.0%	61.5%	34.6%	3.9%
19. Seamless Acceptance Assessment	0.0%	47.6%	31.0%	21.4%
20. Move Update Assessment	0.0%	47.1%	41.2%	11.7%
21. Label Lists including Mail Direction File	0.0%	44.3%	48.6%	7.1%
22. Informed Visibility	0.0%	36.5%	53.7%	9.8%

ALL PARTICIPANTS

Data Report Quality/Level of Information Only

Data Report Quality/Level of Information	Excellent	Good	Fair	Poor
1. Every Door Direct Mail (EDDM) Tool	15.7%	43.1%	29.4%	11.8%
2. Full Service	15.1%	60.2%	22.5%	2.2%
3. Centralized Account Processing System (CAPS)	15.0%	60.0%	17.5%	7.5%
4. Mail Transport Equipment Ordering (MTEOR)	13.8%	62.5%	18.1%	5.6%
5. Full Service Assessment	11.2%	50.0%	28.8%	10.0%
6. PostalPro/RIBBS	11.1%	50.9%	36.1%	1.9%
7. Informed Delivery	10.7%	28.6%	39.3%	21.4%
8. Postal Wizard	10.4%	62.7%	23.9%	3.0%
9. eInduction	8.1%	51.6%	32.2%	8.1%
10. IMb Tracing–Legacy Piece/Tray/Pallet	7.8%	46.9%	34.4%	10.9%
11. Address Management Services (AMS)	7.3%	61.0%	26.8%	4.9%
12. Address Change Service (ACS)	5.7%	51.4%	37.2%	5.7%
13. Facility Access & Shipment Tracking (FAST)	5.6%	54.9%	33.8%	5.7%
14. Electronic Verification System (EVS)	4.3%	59.6%	25.5%	10.6%
15. eVS/Product Tracking System (PTS)	3.7%	63.0%	25.9%	7.4%
16. PostalOne!	2.9%	65.0%	29.2%	2.9%
17. Informed Visibility	2.5%	32.5%	52.5%	12.5%
18. eInduction Assessment	1.9%	40.7%	38.9%	18.5%
19. Label Lists including Mail Direction File	1.4%	44.3%	40.0%	14.3%
20. Seamless Acceptance	0.0%	46.9%	36.7%	16.4%
21. Move Update Assessment	0.0%	43.3%	43.3%	13.4%
22. Seamless Acceptance Assessment	0.0%	41.5%	31.7%	26.8%

All PARTICIPANTS

Ease of Use/User Support Documentation Only

Ease of Use/User Support Documentation	Excellent	Good	Fair	Poor
1. Full Service	16.3%	58.7%	20.7%	4.3%
2. Every Door Direct Mail (EDDM) Tool	14.5%	40.0%	27.3%	18.2%
3. Mail Transport Equipment Ordering (MTEOR)	13.9%	59.7%	20.8%	5.6%
4. Postal Wizard	13.4%	55.2%	28.4%	3.0%
5. Centralized Account Processing System (CAPS)	11.3%	61.3%	22.4%	5.0%
6. PostalPro/RIBBS	10.8%	36.9%	39.6%	12.7%
7. Full Service Assessment	9.9%	49.4%	32.1%	8.6%
8. eInduction	8.1%	54.8%	25.8%	11.3%
9. Facility Access & Shipment Tracking (FAST)	5.8%	53.6%	34.8%	5.8%
10. Address Change Service (ACS)	5.6%	41.6%	34.7%	18.1%
11. Address Management Services (AMS)	5.0%	65.0%	22.5%	7.5%
12. IMb Tracing–Legacy Piece/Tray/Pallet	4.7%	48.4%	34.4%	12.5%
13. Electronic Verification System (EVS)	4.3%	44.6%	38.3%	12.8%
14. PostalOne!	3.9%	44.7%	40.8%	10.6%
15. eVS/Product Tracking System (PTS)	3.7%	48.1%	33.3%	14.9%
16. Move Update Assessment	2.9%	39.7%	44.1%	13.3%
17. Label Lists including Mail Direction File	2.9%	39.7%	47.1%	10.3%
18. eInduction Assessment	1.9%	40.7%	38.9%	18.5%
19. Seamless Acceptance	0.0%	46.0%	36.0%	18.0%
20. Seamless Acceptance Assessment	0.0%	42.6%	30.0%	27.4%
21. Informed Delivery	0.0%	40.7%	29.7%	29.6%
22. Informed Visibility	0.0%	33.3%	51.3%	15.4%

Measuring Convenience, Accessibility, and Support

In another measure of satisfaction, we listed 10 statements relating to convenience, accessibility, and support and asked participants to rate the USPS on each. This time we used a seven-point scale, where seven meant “strongly agree” and one “strongly disagree.” Results for all participants are summarized on page 26.

Scores vary significantly from statement to statement. For example, 62.4% agree that the USPS “is open the hours that I need,” well above the 20.0% who disagree and the 17.6% who neither agreed nor disagreed. But just 25.4% agree that the USPS “offers easy to use/supportable mailing software,” while 40.9% disagree and 33.7% neither agree nor disagree.

Highlights

1. For nine of 10 statements, the majority of respondents rate the USPS in the 5-4-3 middle of the scoring range. For the tenth, “provides easy access to a dedicated representative,” a 44.0% plurality does.
2. The 48.0% who agree the USPS “communicates with me any way that I need” is the second highest agree rating of the 10 questions and well above the 35.7% who disagree. Results for a second question on communication—“keeps me up to date on changes to existing USPS program systems”—were not as strong: 41.1% agree and 34.7% disagree.
3. Two statements about access had higher percentages agreeing than disagreeing: “Provides easy access to a dedicated representative”—46.4% agree and 36.8% disagree—and “Is always available to answer my questions or concerns”—43.2% agree and 35.2% disagree.
4. Two statements most directly address the USPS as a business partner. The first—“USPS wants to help me grow my business”—had mixed results, with 41.2% agreeing, 37.1% disagreeing, and 21.7% neither agreeing nor disagreeing. The half-full interpretation is that more agree than disagree. The half-empty interpretation is that nearly 59.0% are either ambivalent or negative about the USPS’s desire to promote the growth of their businesses. Responses to the second statement—“solves problems quickly”—were less ambiguous: The 32.8% who agree was the second lowest of any of the 10 statements and the 46.4% who disagree the highest.
5. “Integrates technology into my business” had 41.1% agreeing and 33.9% disagreeing. “Offers convenient mail entry options” had similar results, with 39.8% agreeing and 30.9% disagreeing.
6. “Offers easy to use/supportable mail software” was only one of two statements with more disagreeing (40.9%) than agreeing (25.4%)

Please rate the USPS on each statement shown using a scale from 1 to 7, where "1" means you "Strongly disagree" and "7" means you "Strongly agree."

ALL PARTICIPANTS							
Ease of Use/User Documentation	Strongly Agree						Strongly Disagree
	7	6	5	4	3	2	1
1. Provides easy access to a dedicated Representative	15.2%	18.4%	12.8%	16.8%	14.4%	12.8%	9.6%
2. Is open the hours that I need	14.4%	24.8%	23.2%	17.6%	12.0%	4.0%	4.0%
3. Is always available to answer my questions or concerns	11.2%	14.4%	17.6%	21.6%	17.6%	12.0%	5.6%
4. Wants to help me grow my business	9.7%	12.1%	19.4%	21.7%	13.7%	13.7%	9.7%
5. Keeps me up-to-date on changes to existing USPS program systems	8.9%	13.7%	18.5%	24.2%	14.5%	12.9%	7.3%
6. Offers convenient mail entry options	7.3%	17.9%	14.6%	29.3%	17.1%	8.1%	5.7%
7. Solves problems quickly	5.6%	9.6%	17.6%	20.8%	16.0%	20.0%	10.4%
8. Communicates with me any way that I need	4.8%	20.0%	23.2%	16.8%	16.8%	12.8%	5.6%
9. Integrates technology into my business	4.0%	12.1%	25.0%	25.0%	17.7%	9.7%	6.5%
10. Offers easy to use/ supportable mailing software	2.5%	9.8%	13.1%	33.7%	22.1%	13.1%	5.7%

Improving the Relationship Even Further

Having measured current satisfaction, we next asked how the USPS can become an even better business partner. We listed 22 suggestions based on responses to comparable open-ended questions on last year's Mail Industry Survey plus an "other" option. Participants were asked to select up to five of the suggestions that are most important to them. Following are the six selected most often by all participants, service providers, mail owners, and software providers. Complete ratings are on pages 28-31.

All Participants

1. Keep postal rates predictable (48.5%)
2. Communicate more effectively on changes to processes and regulations (39.4%)
3. Increase knowledge of USPS personnel to improve accuracy and consistency (39.4%)
4. Improve mail delivery predictability and reliability (34.8%)
5. Apply rules and regulations consistently (34.8%)
6. Collaborate early with the industry on system and software design (34.1%)

Service Providers

1. Keep postal rates predictable (52.4%)
2. Increase knowledge of USPS personnel to improve accuracy and consistency (43.8%)
3. Apply rules and regulations consistently (39.0%)
4. Improve mail delivery predictability and reliability (37.1%)
5. Communicate more effectively on changes to processes and regulations (36.2%)
6. Collaborate early with the industry on system and software design (31.4%)

Mail Owners

1. Keep postal rates predictable (85.7%)
2. Communicate more effectively on changes to processes and regulations (35.7%)
3. Make it easier to find information on USPS websites (35.7%)
4. Collaborate early with the industry on system and software design (28.6%)
5. Improve mail delivery predictability and reliability (28.6%)
6. Increase knowledge of USPS personnel to improve accuracy and consistency (28.6%)

Software Providers

1. Communicate more effectively on changes to processes and regulations (60.0%)
2. Collaborate early with the industry on system and software design (60.0%)
3. Set realistic dates and deadlines for software releases (40.0%)
4. Improve accuracy of data and reports (30.0%)
5. Better integrate systems to share data (30.0%)
6. Improve system stability and performance to reduce downtime and interruptions; improve timeliness of data and reports; increase reliability of addressing and label list data; and make it easier to find information on USPS websites (each at 20.0%)

How can the USPS become an even better business partner?

The suggestions below were made by participants in our previous survey. Which are most important to you? Please select no more than five.

ALL PARTICIPANTS	
Response	Percent
1. Keep postal rates predictable	48.5%
2. Communicate more effectively on changes to processes and regulations	39.4%
3. Increase knowledge of USPS personnel to improve accuracy and consistency	39.4%
4. Improve mail delivery predictability and reliability	34.8%
5. Apply rules and regulations consistently	34.8%
6. Collaborate early with the industry on system and software design	34.1%
7. Make it easier to find information on USPS websites	26.5%
8. Improve system stability and performance to reduce downtime and interruptions	22.7%
9. Increase responsiveness of USPS personnel	18.9%
10. Improve accuracy of data and reports	15.2%
11. Use easy-to-understand language in communications	15.2%
12. Develop appropriate application of pricing structure and workshare	15.2%
13. Promote the value of mail	14.4%
14. Set realistic dates and deadlines for software releases	14.4%
15. Understand business impact of new or revised addressing programs	13.6%
16. Monitor mail processing to ensure accuracy and consistency across all operations	12.9%
17. Improve rigorous testing of software before releasing	12.1%
18. Better integrate systems to share data	10.6%
19. Increase reliability of addressing and label list data	9.8%
20. Improve timeliness of data and reports	8.3%
21. Improve the FAST Appointment process	4.5%
22. Release more robust payment system	3.8%
23. Other	4.5%

How can the USPS become an even better business partner?

The suggestions below were made by participants in our previous survey. Which are most important to you? Please select no more than five.

SERVICE PROVIDERS	
Response	Percent
1. Keep postal rates predictable	52.4%
2. Increase knowledge of USPS personnel to improve accuracy and consistency	43.8%
3. Apply rules and regulations consistently	39.0%
4. Improve mail delivery predictability and reliability	37.1%
5. Communicate more effectively on changes to processes and regulations	36.2%
6. Collaborate early with the industry on system and software design	31.4%
7. Make it easier to find information on USPS websites	27.6%
8. Improve system stability and performance to reduce downtime and interruptions	23.8%
9. Increase responsiveness of USPS personnel	21.9%
10. Promote the value of mail	16.2%
11. Use easy-to-understand language in communications	16.2%
12. Develop appropriate application of pricing structure and workshare	16.2%
13. Understand business impact of new or revised addressing programs	15.2%
14. Improve accuracy of data and reports	14.3%
15. Monitor mail processing to ensure accuracy and consistency across all operations	13.3%
16. Improve rigorous testing of software before releasing	12.4%
17. Set realistic dates and deadlines for software releases	12.4%
18. Better integrate systems to share data	8.6%
19. Improve timeliness of data and reports	7.6%
20. Increase reliability of addressing and label list data	6.7%
21. Release more robust payment system	1.9%
22. Improve the FAST Appointment process	0.0%
23. Other	2.9%

How can the USPS become an even better business partner?

The suggestions below were made by participants in our previous survey. Which are most important to you? Please select no more than five.

MAIL OWNERS	
Response	Percent
1. Keep postal rates predictable	85.7%
2. Communicate more effectively on changes to processes and regulations	35.7%
3. Make it easier to find information on USPS websites	35.7%
4. Collaborate early with the industry on system and software design	28.6%
5. Improve mail delivery predictability and reliability	28.6%
6. Increase knowledge of USPS personnel to improve accuracy and consistency	28.6%
7. Apply rules and regulations consistently	21.4%
8. Understand business impact of new or revised addressing programs	21.4%
9. Develop appropriate application of pricing structure and workshare	21.4%
10. Increase responsiveness of USPS personnel	14.3%
11. Monitor mail processing to ensure accuracy and consistency across all operations	14.3%
12. Improve accuracy of data and reports	14.3%
13. Use easy-to-understand language in communications	14.3%
14. Set realistic dates and deadlines for software releases	14.3%
15. Better integrate systems to share data	14.3%
16. Improve system stability and performance to reduce downtime and interruptions	7.1%
17. Improve timeliness of data and reports	7.1%
18. Increase reliability of addressing and label list data	7.1%
19. Release more robust payment system	7.1%
20. Promote the value of mail	0.0%
21. Improve rigorous testing of software before releasing	0.0%
22. Improve the FAST Appointment process	0.0%
23. Other	0.0%

How can the USPS become an even better business partner?

The suggestions below were made by participants in our previous survey. Which are most important to you? Please select no more than five.

SOFTWARE PROVIDERS	
Response	Percent
1. Communicate more effectively on changes to processes and regulations	60.0%
2. Collaborate early with the industry on system and software design	60.0%
3. Set realistic dates and deadlines for software releases	40.0%
4. Improve accuracy of data and reports	30.0%
5. Better integrate systems to share data	30.0%
6. Improve system stability and performance to reduce downtime and interruptions	20.0%
7. Improve timeliness of data and reports	20.0%
8. Increase reliability of addressing and label list data	20.0%
9. Make it easier to find information on USPS websites	20.0%
10. Improve mail delivery predictability and reliability	10.0%
11. Promote the value of mail	10.0%
12. Increase knowledge of USPS personnel to improve accuracy and consistency	10.0%
13. Monitor mail processing to ensure accuracy and consistency across all operations	10.0%
14. Use easy-to-understand language in communications	10.0%
15. Improve rigorous testing of software before releasing	10.0%
16. Understand business impact of new or revised addressing programs	10.0%
17. Release more robust payment system	10.0%
18. Keep postal rates predictable	0.0%
19. Increase responsiveness of USPS personnel	0.0%
20. Apply rules and regulations consistently	0.0%
21. Develop appropriate application of pricing structure and workshare	0.0%
22. Improve the FAST Appointment process	0.0%
23. Other	0.0%

We next invited participants to comment on their selections and to share anything else they'd like to concerning how the USPS could further increase its value to the mail supply chain. Representative responses follow.

1. "USPS management and decision-makers would benefit from spending time in mailing industry supply chain shoes to truly understand our businesses and the role the USPS plays as part of our value stream in order to better strengthen the partnership opportunities between the supply chain and USPS for growth and greater efficiencies."
2. "Identify key partner relationships and engage them in strategic discussions before new products, services, or business functions and systems are designed. The USPS needs to understand the difference between mail 'users' and mailing-product suppliers and develop strategies that will enable better hand off of mail into the mail stream."
3. "Let us sit at the planning table so we can help USPS reach their goals and reduce changes needed after the rules and policies are written."
4. "Talk with and listen to competent mail service providers and mail owners before implementing new rules and regulations. (Example: Recent FSS pricing and zone decisions that totally misfired.)"
5. "Understand how to work with the customer/business partner. Too often USPS people forget that without the dollars supplied by the mailing industry there would be no USPS. Also, there are people in all areas, but especially in the payment entry and technology area, that forget the word SERVICE is in the name of their organization."
6. "Talk to us. Get to know the issues we are having and help support us. Do not go behind our back and contact our customers."
7. "Look at how they can improve the relationship not only between the MSP but also the customer. Many customers do not want to work with the post office directly."
8. "Operate more like a business partner and less like a bureaucracy."
9. "Better training of clerks to create consistency with mail acceptance."
10. "Training of personnel in the field. The brain drain has been a killer."
11. "Our local people are fantastic. It is the national people (help desk, etc.) with whom we have some issues."
12. "Keeping our BSN the same so they can gain knowledge of our company and our shipping needs."
13. "Apply rules and regulations consistently both in writing (DMM) and from clerks."
14. "The inconsistent application/interpretation of rules in the DMM by our district clerks causes my company to lose 750,000 nonprofit pieces per month. These pieces are easily mailed at other districts throughout the nation. This must be addressed. Perhaps more Customer Support Rulings? Perhaps clearer rulings? Eliminate the ambiguity and enforce the rules nationwide."
15. "Improve cost accounting processes and assure that ALL costs by class of mail are accurate."
16. "Do not allow URLs/web addresses to be used in the Informed Delivery program. That would cause a dramatic decline in flats catalogs because they will convert to the 6 x 9 postcard."
17. "Let industry partners know how their data and their customers' data are being used and being kept

secure. Make industry partners more confident that the USPS is working with them and not competing against them to build trust between the two rather than skepticism.”

18. “Continue to look for ways to keep customers in the mailing business by keeping costs down for mailers through discounts, promotion incentives, and pricing caps.”
19. “Don’t shift costs back onto mailers. USPS should not be able to assess additional postage after mail verification.”
20. “1: USPS employees need to be up to date on postal rules, regulations, and acceptable standards. 2: Consistent across-the-board enforcement of rules/regulations from their inception. Don’t let them slide by for OVER A DECADE without enforcing then decide to start enforcing without any warning, start rejecting mailings because they don’t meet the standard. This is especially infuriating if you’ve been mailing the same piece for years and it has always been accepted by the USPS without question before. 3: Customer information in Business Customer Gateway isn’t up to date. There is inconsistent information for CRID numbers in relationship to nonprofit customers. 4: The information between Business Customer Gateway and Postal One is not in sync. 5: The DMM is not user friendly and usually creates more questions than it answers, making a call or email to the post office for clarification necessary. 6: CAPS account is hard to track based on when we drop the mailings off to when it was processed by the post office and postage debited.”

The Assessment Process

Three questions addressed the new assessment programs for Full-Service, eInduction, Move Update, and Seamless. The first asked participants if they have changed the size of their staffs in response to the programs. Less than one-quarter have, with 19.8% increasing staff and 4.0% decreasing staff.

Given the launch of new assessment programs for Full-Service, eInduction, Move Update, and Seamless, is your company increasing, reducing, or maintaining staff?

Response	All Participants	Service Providers
Increasing	19.8%	20.8%
Reducing	4.0%	4.0%
Maintaining	76.2%	75.2%

The second question asked if participants have gone through the appeals process. So far, just 24.2% have.

Have you gone through the assessment appeal process for Full-Service, eInduction, Move Update, and Seamless?

Response	All Participants	Service Providers
Yes	24.2%	27.2%
No	75.8%	72.8%

The third question asked participants who have gone through the appeals process to describe their experiences. As the representative responses on page 30 show, experiences vary dramatically. For everyone who described the process as “good,” “reasonable and fair,” or “overall, not bad,” there was someone who described it as “poor,” “painful,” or “horrible.”

One member of our survey group emphasized that preparation made the difference: “We were fortunate that we had the proper documentation to prove our case. Went very smoothly.” Another commented that preparation for the assessment appeal can be challenging: “Lots to learn, not that easy to pick up everything we need to know.” The consensus across these diverse experiences is that the USPS should focus on clarifying, streamlining, and speeding the process.

If you have gone through the assessment appeal process for Full-Service, eInduction, Move Update, and Seamless, what has your experience been?

1. “Still some confusion and slow responsiveness. The engagement process is cumbersome and time consuming, especially for the mailer who is also responsible for their work floor production. They constantly have to repeat and resupply information as the process escalates. Each subsequent request takes more and more time away for the manager being able to do their own function running their business.”

2. “Fair but protracted.”
3. “Laborious. Difficult to prove...both ways.”
4. “Full Service is good. Seamless data questionable for manual samples. USPS needs to provide proof of errors before billing. Undocumented process is too rigorous and costly for mailers to manage and still has problems: 0.1% noise level is not realistic in some environments.”
5. “Full Service has been good. All other programs are done manually so it takes a long time to complete.”
6. “Still waiting to hear on our appeal.”
7. “Very slow response time in reconciliation. Still have reviews from November [approximately four months before survey-ed.] that have not been resolved.”
8. “eInduction continues to be an issue in the USPS getting the information correct.”
9. “eInduction results were presented too many months after the fact, making it almost impossible to retrace.”
10. “Not good. We have not received response back and it has been well over the five-day response period.”
11. “I did this for a couple of our customers. Took me too long to show the USPS was wrong on all counts due to using wrong scanners.”
12. “Assessment caused by USPS software bug. But we have to appeal—which is wrong.”
13. “Satisfied in that it was cleared, but frustrated that we could not clear it earlier due to limitations in the systems.”

What Else Should We Know?

The 2017 Annual Mail Industry Survey concluded with an open-ended question that encouraged participants to expand on their previous answers or raise an issue not addressed by the survey. It’s top-of-mind stuff, best expressed in their own words.

Is there anything else you would like to share about the mail supply chain?

1. “More collaboration between USPS and the supply chain is necessary to ensure that all departments in the USPS understand the value and role of the supply chain to help ‘keep’ mail owners in the mail and using the mail channel. We are the USPS’ best value-added resellers, producing mail for USPS to deliver.”
2. “I’m concerned that the USPS doesn’t understand they are only part of the chain. Without the entire chain none of us have work.”
3. “USPS should be more collaborative with industry. USPS should make a better effort to understand our business model before making rules. Seamless has too much room for error. This causes much churn and cost in defense of USPS problems. TT23 only tested reports, not the data that feeds them. Data is not proven and there are pockets with problems. USPS needs to provide proof of error before billing. I am surprised they are opening up Seamless to the industry. Undocumented, manual tray nesting and manual sampling still have problems.”

4. “It is really time to start thinking about segmenting suppliers based on capabilities. The USPS in many ways is still handling the hand off between major suppliers who can automate a lot of their process, like the mail user who presents their own mailing at the BMEU counter.”
5. “When a mailing that has mailed the same way for years with no eMirs is held up during the mail verification process due to a clerk now looking at the mailing differently, a one-time exception should not take days to accomplish putting the value of the mailing in jeopardy.”
6. “It’s really frustrating when post offices don’t ever answer their phones. The post office should make purchasing stamps easier, like not having only one person who can access the vault.”
7. “Find a way to identify what mail.dat client software is available on Business Customer Gateway.”
8. “I think it is unfair that mail service provider is responsible for customers updating addresses.”
9. “MSPs are always last in the consideration regarding new processing rules and pricing. We need to refresh MTAC into an organization that is on the front end of programs and new rule and Workshare issues.”
10. “The Informed Delivery program should NOT be enabled to tap into the customer websites.”
11. “Eliminate Merlin.”
12. “For eInduction and scan rates along with being able to check in at the dock there is no consistency across the plants, with the Northeast being the worse!”
13. “Be extremely careful with standard letter drop-ship discounts.”

Telephone Follow-Up

More than 50 participants in the 2017 Annual Mail Industry Survey gave us permission to contact them to further discuss the issues raised by the survey. We completed 24 follow-up telephone interviews. A summary of each follows. The headings indicate the primary function of the respondent’s organization, his or her primary work function, and the organization’s location.

1. Print Provider, Owner/Management, Alabama

- Ordering supplies is a pain. You’d think we could just go down to the post office and get stamps, but we have to order them and it can take three days. Sometimes we only have three days to get a mailing out and this can hold us up. We have other problems ordering equipment, like trays, and while a truck comes by with items, we never know what will be on the truck.
- On what the Postal Service could do to improve, respondent said that “overall they do a pretty good job.” His biggest frustration is the pricing. The Postal Service still “doesn’t see the cause and effect” of raising prices. Concerned that USPS wants to remove the cap on price increases: “Come on. Are they just trying to kill us?”
- Thinks USPS recognizes it has competition in packages but doesn’t fully recognize that it has competition for mail, with online alternatives. The resulting decline “is hurting all of us” in the mail supply chain.

- On delivery, “we have a good relationship with our post office and they work pretty well with us.” But he sees some inconsistency with delivery: For the same client something will be delivered in one to three days one month and then take a week to deliver the next month. “Our customers blame us for that until we can show it’s not us.”

2. Print Provider, Production, California

- Company does mostly flat-sized (98%) saturation mail; lots of it is EDDM mail. One of their biggest issues is difficulty getting accurate address counts from the Postal Service for their EDDM. The post office will provide counts and then they prepare mail to those counts. But when they deliver it to the post office, some isn’t delivered because the volume of mail isn’t in line with the number of addresses.
- Respondent said another software issue relates to the assessments and the scorecard. Said it is “pretty frustrating” and “quite a challenge” to drill into the counts to understand the reason for assessments.
- Delivery is a major concern and most important for him is reliability/consistency. His clients mail to a stated in-home date. But sometimes USPS reroutes mail to an FSS facility for sorting and this takes longer, so the client misses the in-home date. He has not been able to get USPS to explain why it sometimes reroutes the mail to an FSS but not always. Suspects it has to do with the volume of mail USPS is dealing with, but the inconsistency hurts the value of the mail. The mail service provider is blamed for the late mail, unless it can show this was a USPS issue.
- A third issue is inconsistency of mail preparation standards. Respondent knows the DMM inside and out and will work with the National Support Center to make sure a client’s mail meets the standards, but he finds that at some facilities clerks allow things they should not. He will tell a client that something won’t meet the standard. But the client might say that the design has been accepted at post office facilities in the past. Sometimes forced to tell a customer that officially the design is not acceptable even if the mail is accepted at some facilities—so the risk is on the customer that the mail won’t go through.

3. Software Provider, Owner/Management, Nebraska

- Overall, respondent thinks the Postal Service is a “great partner.” They are the best partner in the world and they fuel our economy. “I don’t have any complaints about them because they have a huge task and a huge workforce, so I understand some of their problems.” “They are working with the mailers.”
- Does not think, however, it’s fair that MSPs are responsible for mailing lists of their customers. The customers control the lists and it is up to them to update their lists. But the party who fills out the form gets fined. Held accountable but have no control.
- Another issue is that USPS isn’t doing a lot of scans on trays and pallets. They will just scan a handful when there are 50 pallets in the mailing, and they will spread any errors they detect across the whole mailing. Thinks it is unfair to base the mailing on such a small test. Said USPS “is aware” of the problem and “is getting better.”

4. Mail Service Provider, Production, Illinois

- Biggest issues are conflict resolution and customer service. Says that many of the clerks she has to deal with are rude—“It doesn’t seem like you’re the customer; it seems like they don’t want to bother.” Gave the example of a customer canceling a mailing. They were able to retrieve the mail from the facility but “had to jump through hoops to get a refund.”
- Said the mail service provider is always blamed and the Postal Service “doesn’t seem to care” if it loses customers. Said her BSN is great but when she has to deal with the bulk mail manager or others she gets the runaround.

- Another issue is that staff are not consistently trained and “are not on the same page because you get different answers depending on whom you talk to.”

5. **Printer/Mail Service Provider, Mail Production Planning, Vermont**

- The biggest headache for respondent and his customers is undeliverable mail, while customers are not complaining about on-time delivery. He deals with periodicals, packages and standard mail.
- A recurring situation is that USPS will send the mail back with a nixie, etc., and the customer will then mail to a specific customer using first-class mail or express mail to ensure the product gets to the customer. Wonders why the address was good enough for first class but not for the other classes of mail and can't get an explanation from USPS. Thinks that the issue is often the carrier, but he can't prove it.
- Overall, he thinks there is a problem with training of postal personnel, with some well trained and an excellent BMU supervisor.
- Concerning what USPS could do to be a better business partner, said it would be to “understand better the position of the MSP. We are the middlemen between the post office and the customer and can't blast the customer with DMM quotes when there is an issue... the customer wants to know whether something can be done and, if not, why not.”
- Also said inconsistency is a problem. For example, it is to every party's advantage to get out of the use of sacks for mail and for a period of time his northeast area allowed him to brick lay pallets; but then the district said “no” and he can't get anyone to give a reason. Said it makes no sense.

6. **Mail Service Provider, Owner/Management, Pennsylvania**

- “Our biggest concern as a volume mailer is the impact from tenured folks leaving and postal downsizing.” They lost an expert mail-design specialist and miss having that source. Other key management slots are not being filled.
- “On the flip side we couldn't ask for a better partner. I just think there is some strain there from downsizing.”
- Another issue that is “scary” is the amount of mail left in MTE as it's delivered to his shop. Over the years he has cataloged and scanned this mail and has hundreds of pages of it: everything from first class to priority to express and standard. Has seen IRS checks, etc. “They are just not carefully clearing out those trays.”

7. **Marketing Services Provider, Owner/Management, Pennsylvania**

- To be a better partner USPS needs to communicate better and do a better job of resolving issues.
- Respondent does a lot of EDDM and thinks it is unfair that it counts against the scorecard for IMB full service and they have to pay for permits. Said this has been brought to USPS's attention, and they agree it is unfair but nothing has been done.
- Also with EDDM, USPS lost an entire shipment of 25,000 pieces and she had to eat the cost because neither side (induction or delivery area) would take responsibility.
- Would like to see USPS do a better job of promoting mail. Said her company does it constantly but USPS is not doing it consistently. “They are the partner you have to have, not the partner you want.”

- To improve the mail supply chain USPS could improve training. Again, with EDDM she finds that many don't even know what it is and had a post office ask her to come in and conduct training. Thinks there is inconsistency in knowledge—even at the local post office different employees have differing understanding of issues.
- Finally, the USPS meter label solution that she needs stopped working. It has been a year and nothing has been done to fix it—USPS had someone come to her shop to look at it but nothing was resolved. Has to use stamps.com.

8. Mail Service Provider, Postal/Government Affairs, Illinois

- Respondent indicates that a lot of the time she will need to research. She knows the data is available but is not allowed to use it. Understands the USPS privacy concerns but some of this would not affect privacy. “I wish there was more flexibility with the data.” This would save USPS money, as we would not have to rely on them to input the barcode for something that is usually a delivery issue.
- For USPS to be a better business partner communication should be better. Explaining different services is very confusing, but of course it is hard to simplify something so complex. Possibly a flow chart or decision guide would help.
- As to the mail supply chain overall, thinks they do a good job of communicating changes in addressing programs—but it is very complicated. Finds the response time is very good. In the Great Lakes area the BSN often responds within three-to-four hours, which is great. But when you go beyond that it can take too much time. There is an e-certified issue with one of her plants, so USPS has to be involved and this is taking a long time because they don't have the resources.

9. Mail Service Provider, Mail Production Planning, Missouri

- Generally, finds communication a problem. Will contact someone at USPS for something like a large volume of nonprofit stamps and won't hear back for 24 to 48 hours—or personnel will go on vacation and not leave a bounce back message.
- When there are changes in processes or procedures she generally hears of them from several sources, including Idealliance, but the information is difficult to understand. Wishes USPS would provide things in layman's terms and explain exactly what something means.
- Concerned about more predictability and stability for rates but doesn't have any recommendations. Worried USPS will restore the exigent rate increase that came and left.
- Respondent is frustrated by the inconsistent information coming from personnel. The city would “clear” their mail but decided to change things up and the NDC sent someone to verify and clear the mail. This person said there were very different requirements than the city did on skid size and other issues. “We had to constantly prove ourselves and look for items in the DMM and show them. I think they should have been doing that.”
- Other issues for USPS being a better partner include making it easier to get information on the website. She didn't like RIBBS but does like PostalPro, so sees that as an improvement. Finds the DMM hard to work through—gets lost because it won't take her back to where she started after she looks for a link.
- Finally, they are always running out of MTE. “We make it work” by sharing with other facilities but it is a constant problem and “USPS says it is an issue across the country.”

10. Design/Print/Mail Service Provider, Mailing Services Manager, Washington

- Thinks USPS needs to communicate more effectively and increase the knowledge of personnel.
- Biggest issue is inconsistency of enforcing procedures. Example of a nonprofit school that for years sent a mailing that did not have “school” in the return address. This was no problem and then all of a sudden the Postal Service said the word “school” had to be in the address or they would have to mail first class. Had similar situations with abbreviations allowed in addresses for years and then suddenly not. Said it’s fine if they decide to enforce the rules but they should give us a heads up so we can do it on the next mailing.
- Also has an issue with the fact that sometimes the only person who can open the vault at the post office is away so she can’t buy her first-class stamps. “They should be working with us more cooperatively. That would go a long way.”
- Pointed out that the customer sees the MSP as the post office and doesn’t care whose fault it is. Puts MSPs in a hard place.

11. Logistics/Transportation Services, Postal/Government Affairs, Connecticut

- Drop-ship consolidator who has a lot of issues relating to FAST. When trucks go into New York, or even Chicago, and are on time for appointments, sometimes USPS doesn’t have the dock space for them and they have to wait. They get ticketed by the police for that.
- We will be told to wait because there is only one forklift or it’s out of power. This is frustrating because they know we are coming and should prepare for that.
- Facilities don’t follow official hours. They say they are open at specific hours and we make appointments but when the trucks arrive they have to sit there. Don’t take the mail at 6 even though that’s when the appointment is, so our trucks sit there and things get backed up. Often our trucks have to sit for hours and we are paying for that. This can also delay the mail.
- On Geofencing, USPS should get its system to link with us. That way they will know when we are coming or are delayed and can tweak their staffing to benefit them and us.
- Also, there are a lot of new people at USPS and they don’t understand their own system or how we work. I would like to see an MTAC during which the whole time we outline our issues for USPS and they listen and ask questions.

12. Print Provider with Agency/Letter Shop/Data and Analytics, Postal/Government Affairs, Florida

- A big issue is the departments at USPS have silos so, for example, Informed Delivery and Informed Visibility don’t have any interaction.
- But the biggest issue is that they don’t communicate with us or understand our business. They think they do but they don’t.

They now have an “Agile Development” approach in which they break programs into parts and will communicate with us on a piece and modify it before moving on to the next spurt. But they aren’t listening or understanding. For example, for the national rollout of Informed Delivery they haven’t yet developed a way to put our URLs with images.

- Or they started Marketing Mail but tell us that it decreases the open rate—so why start it?

- Or they do sampling test scans of the MIDs in a way that forces us to unwrap, unpack, and is all around cumbersome. Also, they continue the same percentage of checking even though they have never found an issue with us. They should reduce the amount of test scanning they do if they've found nothing wrong and then increase it if there is an issue.
- They don't understand their customers and how we operate. They don't treat us like partners; they dictate to us.

13. Mail Service Provider, Postal/Government Affairs, Georgia

- Thinks USPS goes through the process of announcing they will be making a change but doesn't consider how the industry will cope. They need to sample industry partners. They set up a telecom and ask if everyone is OK, and if no one speaks up they assume that the changes are fine with everyone. But that's not the right forum. They should provide some of the 20/80 people (20% of the industry with 80% of the mail) on a one-on-one basis. They should also visit MSPs because we are not all the same.
- The reliability of label lists is a huge issue. The overlapping lists from month to month cause challenges for MSPs in selecting which makes the most sense for a mailing. But too often USPS will say there has been an error in a list and not to use it—this sometimes happens after mail has already been prepared using that list. This has happened more than four times in the past 12 months. “These lists should be gospel and double checked and triple checked.”
- Would like to see more layman's language in communications. And wants to send a message to the PRC that unpredictable rates are hugely disruptive for the industry. The exigent increase followed by removing it and then potentially going back to it is very difficult.

14. Mail Service Provider, Postal/Government Affairs, California

- Uses the FSS situation as an example of how the Postal Service tows the line in a militaristic way and won't admit that it isn't more efficient.
- Silos are a real problem because different groups simply don't understand the business. We have to know everything about costs, processes, and procedures but they only know their little piece of it.
- Thinks the CPI Cap definitely forced USPS to be more disciplined.
- Thinks USPS doesn't understand that MSPs are partners. “If we weren't putting unique barcodes on our mail do you think they would have informed delivery? NO.”
- Likes that Idealliance is looking at other industries for possible answers but wishes USPS could be more opened-minded about looking elsewhere for some help.
- Thinks that all USPS really understands is data. So if the industry can present data in a disciplined, professional manner to show what the issues are USPS won't be able to argue with that.

15 Mail Owner, Postal/Government Affairs, Florida

- Has some concerns with the payment modernization effort. (Is on the payment modernization work group at MTAC.) The first step is transferring PO boxes and caller boxes to electronic. Wanted to test out before jumping in and the Postal Service kept moving the date for preproduction, stringing respondent's company along for a long time. Postal Service still struggling to get the right people in place and now says it is going into production without testing.
- Says that in our business we should under-promise and over-deliver, but they seem to do the opposite. He's OK that the process is taking longer but wishes they had set more realistic deadlines.

- Also has issues with PostalOne! because it is down a lot or too slow.
- Finally, on mail processing facilities would like to see visibility with the bundle leaving the plant and again arriving at the delivery unit because there is a lot of inconsistency in processing.

16. Mail Service Provider, Postal/Logistics & Production, Connecticut

- The problem with USPS is they don't understand that they are a link in the chain that starts with the paper mill. They don't see us as partners or treat us as partners. There is not a lot of trust in the industry.
- I do think this year is better than last year but don't understand some of their priorities. Why are they spending so much time and money on PostalPro when there are major issues that affect their costs and ours—like all the problems around fast appointments and scheduling. If they fixed these more basic issues it would put more mail in the mail stream.
- Final concern is the brain drain. So many good people are leaving and this affects progress as the new people coming in first have to be brought up to speed before they can even advance.

17. Mail Service Provider, Postal/Government Affairs, Connecticut

- Sometimes uses the FAST database and the label lists are not always up to date. Doesn't mind being redirected but doesn't want to have to take the mail to one location and be told to take it to another because the label list data is out of date.
- Biggest issue is that Postal Service employees at the management level are not responsive. You sometimes have to call or email multiple times and they don't even acknowledge your communication.
- Thinks the more heads-up on software upgrades or other changes they can give, the better.
- Respondent is experiencing the brain drain. Really qualified personnel are leaving and the people replacing them simply don't have the same level of knowledge.
- Also gets frustrated with different interpretations of rules by personnel. Had a mailpiece you are supposed to measure at three points to establish the required minimum thickness is across 80% of the piece. But the clerk only wanted to measure at a single point—the thinnest point—and was going to reject the piece. He had to make several phone calls to fix this. Said it doesn't happen a lot but is very frustrating when it does.

18. Marketing Services Provider, Postal/Government Affairs, Minnesota

- USPS doesn't understand how they affect MSPs. They need to improve PostalOne! For a while it was down frequently and we had to do a lot of workarounds. But they are stabilizing it and it is getting better. But upgrades require taking down the complete system; they need to go to a more modular approach.
- Internally the Postal Service is in silos so when you are working with one group and would like to have certain information or data it is not available to you because it's in a different department. They need to be more integrated.

19. Mail Service Provider, Owner/Management, California

- One of the most irksome things about the Postal Service is when they go directly to our customers. This confuses the customers because they want us to be the intermediaries. Also, with EDDM they

approached our customers but EDDM is not appropriate for many of our customers. It just confused and angered them.

- PostalOne! has lots of down time and there are issues uploading to Mail.dat. In any given week, these systems will be down multiple times.
- Have been seeing a delay in mail even when it isn't the heavy mail season. Delivery is very inconsistent.
- Clerks' knowledge is also inconsistent. Had to explain to a clerk in San Diego what full service meant.

20. Order Fulfillment Services, Postal/Government Affairs, Iowa

- Sometimes USPS will start talking about something they want to implement and it's already implemented and we never heard of it before. They should approach us first. It seems like USPS is getting more responsive to industry while Canada Post is getting less so.
- Addressing and label lists are areas where USPS "is struggling." They don't realize that when they make a change it takes some work on our part. It goes first to the software vendor and then to us. And sometimes they make errors in the labeling lists.
- But thinks "overall management gets it now," although ongoing changes in management are a problem.

21. Mail Service Provider, Owner/Management, Ohio

- The five-year plan did not even mention the term MSP—I talked to the PMG about this and she was surprised. I feel she is more pro-industry.
- If they include us in the planning stages that will address a lot of the problems.
- USPS needs to do more to promote the value of mail. Direct mail as a tool is growing because people are starting to get that electronic is not all it's cracked up to be.
- There is a problem with personnel training and consistency. The folks at the top are great but it doesn't translate at the local level, at least not in our area. I get that it is difficult to train hundreds of thousands of people but something is wrong.

22. Print Provider, Logistics & Transportation Planning, Maine

- We have an ongoing issue with eInduction. Every month we get the assessment and the scorecard indicates problems and says we have exceeded the threshold. And we have to go back and show them that it was a scanning issue on their end. It was a matter of the barcode not scanning properly. Seems like rather than being innocent until proven guilty we have to prove our innocence.
- Similar problem with uploading files to PostalOne! If there is an issue it takes three hours to clear. We can't wait that long to upload information, so we do it and it shows that we have a duplicate barcode. So we have to stop and address that issue—no duplicate, just a matter of the system not clearing fast enough.
- Another concern is that they will send their trucks to the plant at the appointed time, but they will have to sit there for several hours and that sets them back for the next delivery. "It happens all the time." They accept appointments for 6 a.m. but don't start actually until 8 a.m., so it's already backed up. And you can't just schedule for 8 a.m. because someone will get in before you.
- We have an internal report from mail.dat files and we scan USPS scans and this shows differences from USPS scans. They have gotten better but some facilities still don't scan the pallets.

- Personnel need to apply rules more consistently. We will get a new customer and they show us a mailpiece. We know it can't be mailed that way and run it through a mailpiece design analyst who agrees that it won't qualify for automation rates. But the customer was getting that piece through at another location because they accepted it and applied the rules differently. It doesn't make us look very good.
- "Overall the Postal Service is very good. Once you can prove, they are more than willing to make adjustments. It's just getting to the right people." "The people I deal with are really good people and want to do a good job but don't understand from the mailer's perspective. They don't see the whole picture."

23 Mail Industry Association, Owner/Management, Maryland

- I don't know how bad some of these issues are nationally but in pockets there are real problems. I was surprised that postage refunds or challenged assessments take months and months. I know a guy who is owed \$120,000 from USPS and has been waiting months for it. "Some of those business processes have broken down over the years."
- Also, you are supposed to be able to escalate issues to higher people like the premier BMEU or someone at headquarters, but it can take days or weeks for them to get back to you. It's like dropping something into a black hole.
- We have a lot of mailers that are more sophisticated, yet the same acceptance process is used for them. There should be two separate processes.
- Finally, I don't like the "I gotcha" perspective USPS seems to have with the scorecard and other issues. Rather than every month coming to you and showing you what you did wrong and penalizing you for it they should be sharing data in real time and saying, "this looks like a problem; let's fix it" so your mail can get through.

24. Mail Owner and Direct Merchant of Promotional Products, Owner/Management, Wisconsin

- The Postal Service doesn't listen to us before going ahead. The perfect example is FSS, which is an unmitigated disaster and costs 10% more than carrier route.
- A few years back they wanted to get more volume on the FSS and so expanded the ZIP codes that had to use it. But since it is more expensive than carrier route and the preparation is complicated, catalogs simply didn't mail into those ZIP codes and volume declined. They had to pull back on that and should have asked mailers. Also, forcing mailers to prepare mail two ways—for and not for FSS—is ridiculous.
- The same problem exists with changing standard mail to marketing mail and the Informed Delivery—which scares me to death. They didn't ask us first.

Next Steps

We will conduct the Mail Industry Survey again in 2018. Results will be directly comparable with the benchmarks established this year, allowing us to accurately measure progress toward greater mail supply chain efficiency. Has the percent who rate a particular USPS program system or function excellent rather than good, good rather than fair, or fair rather than poor increased? Are a higher percentage now mostly satisfied rather than somewhat satisfied? Somewhat satisfied rather than somewhat dissatisfied? Where has the most progress been made? And where is improvement most needed?

Of course, no survey is perfect. So we'll use everything we've learned this year to strengthen next year's. What are your suggestions? How do we make next year's survey even better? Please share your ideas with David Steinhardt, Idealliance President and Chief Executive Officer, at (703) 837-1066 or dsteinhardt@idealliance.org.

About Idealliance

Idealliance is a global non-profit organization for the visual communications and media industry. We are focused on sustaining the future of our industry. With our 100 plus years of qualified experience concentrated on integrated capabilities and total supply chain process, we deliver best-in-class specifications, certifications, research, and consulting that drive community, innovation, and inspiration. Our specifications define production workflows for color (GRACoL[®], SWOP[®], XCMYK[™], G7[®]) content management (PRISM[®]), mail supply (Mail.dat[®], Mail.XML[™]), and paper (papiNet[®]). Join us in directing the future of our industry. www.idealliance.org | 703.837.1070



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