



# Taylor Streamlines Bank's Branch Marketing Operations

**Results**  
 The bank realized significant financial and operational efficiencies with Taylor's profiling and automation solution.

## Challenge

A regional bank in the Northeast wanted a better way to supply branded grand opening materials to hundreds of branches. Each location needed up to 75 items – from nameplates and promotional products to banners and signage – to comply with federal and state regulations. Having bank staff order materials from 40 different suppliers was inefficient and the bank's headquarters lacked sufficient space to stage and assemble orders. Up to six bank employees would spend a full week preparing shipments to individual branches and the bank was paying exorbitant freight costs.

## Solution

As a provider of printed materials to the bank for several years, Taylor augmented its existing e-commerce portal to further streamline the ordering and distribution of branch materials. We uploaded branch and employee data to our internal system and generated orders for personalized teller stamps, business cards, and more – allowing the bank to supply materials to hundreds of branches simultaneously with minimal involvement of bank staff. Taylor provided the bank with:

- An automated determination of material quantity per branch based on information such as number of accounts and deposit levels
- Storage of externally sourced items at Taylor, saving the client money with one mass shipment to our facility rather than multiple shipments to bank branches
- Sorting and kitting of all materials for each branch, then palletizing, shrink-wrapping and labeling assembled shipments
- Meticulous quality control to ensure accuracy of contents and quantities
- Reduced costs through consolidated shipments of forms, checks and other operational documents with the grand opening materials

**COST SAVINGS**  
 Freight costs are minimized through consolidated shipments and leveraged carrier relationships.

**PRODUCTION EFFICIENCY**  
 Faster and more accurate product distribution saves the bank the cost of their staff's time.

**SPEED TO MARKET**  
 Intuitive data determinations and expert order assembly get materials to branches much faster.