



Process Improvements Through Smarter Technology for 5,000 Branches

How ODP Business Solutions® partnered with a major U.S. Financial institution to streamline branch marketing materials and introduce cost controls.

Case Study





Overview

One of the largest U.S. financial institutions with more than 5,000 retail locations sought a way to simplify how branch marketing materials were ordered and managed.

Previously, the branches were manually handling orders through a third-party vendor, resulting in the monthly budget being completely consumed by the marketing team. To streamline the process and improve efficiency, the team was searching for a comprehensive solution that would:

- **Provide branches with access to folders and envelopes for customer-facing materials**
- **Introduce spending limits at the branch level**
- **Reduce manual coordination and reporting burdens**
- **Systemically allocate product costs**

Across internal teams, ODP Business Solutions® designed a program that fit these needs and centralized control, while giving individual branches more flexibility and visibility.



"From the beginning, the partnership I've experienced with ODP Business Solutions has been exceptional. Their reliability, proactive communication, and meticulous attention to detail have consistently impressed me.

"Whenever challenges arose, the ODP Business Solutions team demonstrated a remarkable ability to problem-solve and offer effective solutions. Together, we successfully delivered high-quality paper storage options that supported our strategic objectives and met our budgetary requirements."



"We worked with ODP Business Solutions on a variety of other projects previously, so we approached them to understand more of their capabilities. Upon hearing of our situation, ODP Business Solutions wanted to help us, but they didn't have the technology in place to allow order limits through our ordering platform. But they didn't let that stop them! They worked to develop an order restriction solution, which they quickly got up and running. The product is less expensive, our teams have access to more paper storage options providing a consistent brand experience, and it frees our team up from ongoing inventory management."

Operational Challenges

Before ODP Business Solutions® became involved, the institution's distribution system created several operational hurdles:

- **Orders and inventory were managed independently at each branch, resulting in inconsistent costs and product quality**
- **Expensive folders were limited in quantity, forcing staff to ration materials or use unbranded substitutes**
- **Marketing teams had minimal visibility into spending, absorbing costs without insight**
- **Manual coordination drew staff away from strategic initiatives**
- **Lack of centralized reporting made planning, tracking, and measuring performance difficult**

These inefficiencies hindered brand consistency, slowed operations and created unnecessary administrative strain across the network.



How ODP Business Solutions Transformed the Process

ODP Business Solutions® developed a comprehensive solution that combined consultative support, product sourcing and technology-enabled fulfillment. The goal was to simplify operations and bring greater transparency, control and consistency to how the branches can access branded materials.

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|  Centralized budget and ordering controls <ul style="list-style-type: none">• Introduced branch-level spending limits with automated monthly resets• Implemented controls in the internal ordering system to help manage budgets and prevent overspending• Provided reporting to enhance visibility for branch managers and marketing teams |  Consultative onboarding and continuous support <ul style="list-style-type: none">• Partnered closely with internal teams to guide adoption of the new envelope products• Simplified the ordering process, reducing manual effort and administrative tasks• Maintained proactive communication and responsive problem-solving throughout rollout and ongoing operations |
|  Efficient logistics and fulfillment <ul style="list-style-type: none">• Preloaded branded materials into the institution's internal ordering system before launch• Achieved next business-day delivery for most branches and quick distribution to all 5,000+ locations• Managed reorders and ongoing inventory to maintain consistent access across locations |  Measurable Impact <ul style="list-style-type: none">• 1.5 million folders delivered in the first batch, followed by another 1.5 million in reorder• Envelopes introduced as a new branded product• Centralized cost controls established across all locations• Reduced manual handling of orders & cost allocations and reporting• Faster fulfillment with next business-day delivery for most branches |



Why the Approach worked

ODP Business Solutions® combined operational insight with consultative support to deliver a solution that addressed both logistical and strategic needs. By centralizing budget and order management, the program reduced administrative burdens while empowering individual branches and providing access to essential materials. Fast, reliable, logistics provided consistent availability across all 5,000+ locations, while reporting provided valuable visibility into usage, adoption and program performance.

Conclusion

Streamlined and scalable programs can transform the management of materials across large enterprise networks. In this case, ODP Business Solutions demonstrated how combining consultative guidance, technology integration and responsive fulfillment can simplify operations, enhance brand consistency and deliver measurable efficiency.

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