



# Creating efficiency and value

through digital distribution  
of inbound mail at  
Wheatley Group

**Postal mail continues to be a critical part of the communication cycle, particularly within the non-profit and public sectors where organisations are tasked with reaching a broad spectrum of the community. This volume distribution must happen against a backdrop of strict compliance requirements and frequent regulatory changes, with the increasing threat of data and security breaches looming large.**

Handling mail is often heavily reliant on manual processes and can therefore run the risk of inefficiency and human error, with potentially serious financial and reputational impact if compliance is compromised. This manual processing can also subject query resolution to delay, with a resulting negative bearing on customer experience.

Many organisations in these sectors and beyond have identified inbound mail handling as an area for improvement, recognising the need to digitally transform this legacy process.

**One such organisation is Wheatley Group** – the leading housing, care and property-management group in Scotland. The Group’s social housing division focuses on providing housing for low-income and vulnerable populations, owning or managing over 93,700 homes and delivering award-winning services to over 210,000 people.

Wheatley Group has been a long-standing Adare SEC client for print and mailing services, and both companies have developed a strong relationship to ensure the smooth processing and delivery of over 12 million customer communications over the course of the partnership.

## Manual legacy

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More recently, Wheatley Group recognised the need to transform the way in which its teams processed, distributed and accessed incoming mail.

Processing the volume of inbound postal mail was an intensive manual process. Upon delivery to its facilities, each mail item needed to be opened, prepared and scanned. Some documents contained up to 30 pages, and all pages had to be flattened, with staples removed, before being individually scanned by hand using a multi-function desktop scanner/printer.

Once scanned, the digitised version of the document was then distributed. This involved emailing the scanned document from the multi-function device to the mailroom team who would review the appearance and content of the document to identify the intended recipient. The mailroom team then forwarded the scanned document by email for continued processing.

## Catalyst for change

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The COVID-19 pandemic was a turning point for Wheatley Group. During this period, the number of onsite mailroom staff was dramatically reduced, leaving a single employee to manage the digitalisation of all mail. Added pressure on the facilities team made it difficult to stay on top of mail volumes, leading to slower processing times and potential delay to priority documents.

The team recognised the inherent risk in the process. One person processing the mail meant a single point of failure. Additionally, distribution via email meant the audit trail for documents was unreliable, putting data security at risk.

## A phased digital solution

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Wheatley Group's requirement was clear. The organisation wanted a solution that reduced the daily manual burden on colleagues and that provided employees and case handlers with quicker visibility of their mail. Data security and compliance was paramount, as was the ability to implement the solution in an agile fashion to enable team-by-team onboarding with minimal disruption.

**Wheatley Group trusted Adare SEC with implementing its digital mailroom solution, and Adare SEC devised a two-phase solution which, today, is delivering significant operational gains.**

## Phase 1

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In phase 1, a mail redirect was implemented which routed all Wheatley Group mail from its Glasgow site to Adare SEC's nearby operational hub in Bellshill. At Bellshill, the outsourced mail is securely scanned using Adare SEC's high-volume scanning technology.

In this first phase, every scanned piece of mail was assigned to a single work queue and presented to Wheatley Group via a web-based portal to allow manual document allocation to relevant users and teams. The web-based portal offered secure access and the ability for authenticated users to view inbound mail from anywhere - whether onsite or remotely. Digitised mail is ingested into the portal, effectively providing a real-time overview of a customer's entire communication history.

**By removing the scanning process from Wheatley Group, the allocation of digitised documents could happen at a far greater speed. Access to the holistic customer journey enabled Wheatley Group to respond with enhanced speed, accuracy and intelligence.**

## Phase 2

Phase 2 ramped up the volumes, with Adare SEC's Bellshill site now receiving mail from eleven other Wheatley Group sites.

Adare SEC's inbound operators learned Wheatley Group's business rules for identifying key document types, which subsequently enabled digitised documents to be auto-routed straight to the intended team (as opposed to requiring mailroom staff to classify and re-distribute).

During this phase, Wheatley Group trained and onboarded a further 19 teams to the self-serve portal.

Wheatley Group's Facilities Manager comments:  
"This was a massive cultural change for our business and the Adare SEC team has supported us every step of the way with expertise and patience.

**"The introduction of this new digital way of managing our mail has been an absolute success and moved us so far forward, not only from a team perspective but also on our overall corporate digital strategy.**

We now have a system that allows us to be completely robust against so many problems that we encountered through Covid, including eliminating the risk of a single point of failure. The solution has taken away so much laborious manual work and given us back time to perform other key tasks. We are working in a far more productive and professional fashion with safeguards now built into the process."

# Impressive outcomes



**12**

Wheatley Group sites are directing inbound mail today to Adare SEC's mail processing facility in Bellshill, with the result that all Wheatley Group mail is processed in a standardised, secure and consolidated manner.



**24**

teams (130 authorised users) have been onboarded to the secure, self-serve portal, further safeguarding customer communications through rigorous audit trails and compliant security protocols.



**80%**

increase in Phase 1 operational efficiency against previous manual prepping, scanning and emailing.



**30k**

documents per year approximately are being received and digitised enabling secure and compliant digital distribution and facilitating remote working.



**87%**

increase achieved in speed from mail delivery to reaching intended recipient, helping to expedite downstream processes.



**74%**

further increase in phase 2 operational efficiency the automatic routing of digitised mail, enabling speedier decision-making and allowing those teams previously processing mail to focus on frontline tasks.