Insurer's Checklist For Selecting the Right Print and Mail Vendor

Criteria

Checklist Items

Regulatory Compliance

☐ Ensure the vendor complies with data protection laws (e.g., GDPR, HIPAA).

☐ Verify the vendor's capability to meet insurance-specific document delivery regulations.

Certifications

☐ Verify SOC 1 Type II and SOC 2 Type II certifications to ensure robust data security and operational controls.

Data Security & Secure Email Delivery

☐ Evaluate encryption standards and data protection protocols.

☐ Confirm secure email delivery options with industry-standard protocols like SPF, DKIM, and DMARC.

Sustainability

☐ Look for environmentally friendly printing practices and sustainability initiatives.

Technology Integration

☐ Ensure seamless integration with existing insurance platforms and CRMs.

Disaster Recovery

☐ Assess the vendor's disaster recovery plans to ensure uninterrupted service during emergencies.

Equipment Reliability

☐ Verify the use of state-of-the-art production equipment and maintenance schedules.

Service Level Agreements (SLAs)

☐ Establish SLAs covering turnaround times, quality metrics, and support response times.

Postal Delivery and Optimization

☐ Ensure delivery to Bulk Mailing Entry Units (BMEU) for expedited processing.

☐ Confirm CASS-certified postal processing and address hygiene services.

☐ Support for USPS Intelligent Mail barcodes to limit mail delivery to inactive addresses.

Quality Control/Assurance Practices

☐ Ensure on-site USPS Representatives perform quality control routines.

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