

Natalie Rubel, Cabot Money Management client service specialist, is able to work five times faster on clients' shipping needs with the help of WorldShip.



CHALLENGE

Cabot Money Management Inc. must ship 100-plus time-sensitive tax packages to clients nationwide in just three days.

SOLUTION

With WorldShip®, Cabot shaved 26 hours off shipment processing time. The company uses UPS air services for secure, on-time delivery.

TAXED FOR TIME

WEALTH MANAGEMENT FIRM CABOT MONEY MANAGEMENT RELIES ON UPS FOR SECURE, ON-TIME DELIVERY

Tax season is upon us – bringing with it a tsunami of information that threatens to swamp even the most organized among us. Some of us rely on wealth management firms with tax preparation services, like Cabot Money Management Inc., to navigate the complex IRS regulations – and to file our taxes on time.

But who does Cabot turn to when taxed for time? For almost a decade, the Salem, Mass.-based firm has depended on UPS to deliver confidential information securely and reliably to individual and business clients nationwide. Thanks to WorldShip®, Cabot has shaved 66 processing hours each tax season from the more than 250 tax engagement packages the company sends to its clients.

This time savings has enabled Cabot's tax managers to spend less time on shipping and more time providing the personalized service that differentiates Cabot from competitors.



AUTOMATION MATTERS

Steve Davis, Cabot senior tax manager, remembers a time-consuming, stressful, manual shipping process prior to using WorldShip. "We would be looking at our CRM (client relationship management system) to obtain a client's address and there could be three different addresses," he recalls. "It could take several minutes just to get the correct address."

Cabot also ships each tax package with a return label, which presented another problem. "We do taxes for a select group of our clients," Davis says. "Sending out a package to Mr. Smith with a return label for Mrs. Jones would be a disaster. I used to spend an entire day sorting through packages to make sure the right package was going to the right person and the right address for our annual tax summaries," Davis says. "WorldShip automates this task."

The WorldShip address book provides a central repository for client shipping data. "We're able to keep this information really current, which is crucial," Davis says.

Natalie Rubel, a client service specialist at Cabot who serves as the WorldShip system administrator, worked with UPS Inside Sales Representative Nicole Monk to get WorldShip and other UPS technology products installed. "The process is five times faster with WorldShip," Rubel says, who starts the tax season by assembling tax engagement packages for clients. "It takes me less than a day to get more than 100 tax packages put together."

Rubel depends on Quantum View Notify® to alert clients through email

that a package is on the way. "It's a lifesaver when we have a large shipment going out over a short period of time," she says. "By giving clients an email alert that the package is on the way, clients can alert us of changes in delivery schedule. This prevents us from delivering time-sensitive information to an unattended home."

REDIRECTING A PACKAGE

"As a trusted wealth management firm, we rely heavily on UPS for the delivery of sensitive documents and the security of our clients' confidential information," says Rubel, who credits UPS Delivery Intercept® as a valuable tool in protecting client privacy. "A client can be in a winter home in Florida and coming home to Michigan, and we need to intercept the package and redirect it to his Michigan address," she says. In the rare instances when this has been needed, Rubel was thankful to be able to initiate a delivery intercept.

"We use UPS as opposed to other services because the ability to reroute a package is key," Davis says. "These packages include highly important time-sensitive information. You don't want them sitting unattended. By using UPS, we are confident that we are providing our clients with the most efficient delivery shipping solution."

SATISFY YOUR CLIENTS

With UPS technologies and solutions, you can meet urgent shipping needs and keep your clients satisfied. To learn how logistics can help your firm succeed, visit ups.com/professional.

CABOT MONEY MANAGEMENT INC.

Wealth management.

FOUNDED: 1983

BASED: Salem, Mass.

EMPLOYEES: 18

WEBSITE: ecabot.com

Reroute, reschedule

MAINTAIN CONTROL WITH UPS DELIVERY INTERCEPT

If you're shipping a package and discover it needs to go to a different address, the shipper can request a package intercept at any time before the first delivery attempt. With UPS Delivery Intercept® you can:

- **Return to sender.** Return the package to the shipper.
- **Deliver to another address.** Reroute the package to a new address.
- **Reschedule delivery.** Hold the package for delivery on a future date.
- **Will Call.** Hold the package at UPS for pickup by the recipient.

A fee is assessed – if the intercept is completed – for all requests except Will Call. You can request an intercept online using ups.com, UPS CampusShip®, WorldShip® or Quantum View Manage®.