

Company Profile: Banking

Industry: Financial Services

Locations: 2,800+



Financial Services Case Study

Overview



This Financial Services company was struggling with postage equipment fleet administration. They have been our client since 2013. Postal Advocate does much of the day-to-day management of the mailing spends. Our services stood out to the client over other options because of our industry knowledge and service expectations.



Approach



When Postal Advocate started working with this financial services company they needed assistance with managing renewals, terminations, and right-sizing. We provided the client with bid assistance as well. We were able to transition low to mid volume users to enterprise online postage. We made the transition seamless for our client and quickly answered any questions or concerns they had during the process. Finally, we coordinate vendor open items, such as handling billing issues, equipment returns, and new installations.



“The industry expertise and insight is valuable to conversations with third party providers. Adam Lewenberg is a good communicator with our team and the portal is easy to work with for our users.”

-Financial Services Industry

Results that Speak Volumes



Completed **549** transactions.



Managed over **\$4.5M** in total spend.



Generated over **\$2.3M** in total program savings.

In the end, Postal Advocate helped this financial services company by acting as subject matter experts on all postal related issues and industry knowledge. At Postal Advocate we take the stress out of this category for our clients. Our actions have helped our client achieve the streamlining of their equipment fleet and lower negotiates pricing.

Conclusion

Since we started the program, we have helped drive **58%** in gross savings through transitioning the fleet renewals, vendor credits, and postage refunds. The changes Postal Advocate made allowed for a smaller fleet and reduced costs.