

**Company Profile:** Life and Health Insurance

**Industry:** Financial Services

**Locations:** 640+



## Financial Services Case Study

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### Overview



This Financial Services company was struggling with managing their mailing machines and making sure end users were selecting the rightsized equipment and services from their vendor. They have been our client since 2021. 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 we were very willing to partner with the client to address their needs.



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### Approach



When Postal Advocate started working with this financial services company they needed assistance with managing renewals, terminations, and right-sizing. We audit monthly invoices and provide chargeback reporting. We are starting the transition for this client from meters to an enterprise online postage solution that supports stamp printing. Our team also handles adding any new locations and users. Finally, Postal Advocate coordinates vendor open items, such as handling billing issues, equipment returns, and new installations.



“Postal Advocate’s team is very willing to address the issues and takes ownership of the process, and we are able to achieve savings in the process.”

-Financial Services Industry

## Results that Speak Volumes



Completed **38**  
transactions.



Managed over **\$580,000**  
in total spend.



Generated over **\$120,000**  
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 lower costs in terms of both reduced internal management costs and equipment lease costs.

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### Conclusion

Since we started the program, we have helped drive **83%** in gross savings through transitioning the fleet renewals, vendor credits, and postage refunds. The changes Postal Advocate made allowed for a streamlined process for end users, lower costs for end users, and savings reports.