



## Salesforce Case Study

### Financial Services

#### Client Profile

\$2B Diversified Financial Services & Insurance Company

#### Business Issue

- Company had a tactical relationship with Salesforce and needed to elevate to a more strategic level
- Was under a one-year order form that was up for renewal
- Needed to expand its volume commitment to Salesforce given company-wide growth
- Concerned that they were paying for more functionality than needed

#### Services & Results

UpperEdge provided an assessment of current pricing and commercial relationship:

- Assisted in determining what **product and product edition** was the best fit for their needs
- Developed a **negotiation strategy** to achieve a more strategic relationship with Salesforce
- Achieved **best-in-class upfront pricing** and discounting with **long-term price protections**
- Obtained a custom user type that aligned with client's actual user needs at a **significantly reduced price**
- Saved over **\$8M over a 6-year period**