

Global Financial Services Technology Company Gains \$2 Million in Renewal Revenue in 5 Weeks



WHAT WE DID

Customer Retention
+ Upsell

Outbound Inside Sales

Customer Engagement
Center



INDUSTRY

Technology | Financial
Services



RESULTS

\$2 Million in Customer Renewal Revenue
in 5 Weeks

Retained Nearly \$40 Million in Annualized
Revenue

Annualized Revenue 58% Above Quota



Lack of Dedicated Retention Team Risked SMB Customer Churn

CHALLENGES

- Staff scaling constraints
- Churn risk across small-to-midsize customers
- Revenue erosion from missed retention + upsell opportunities

[SITUATION]

A financial services technology company that provides tax and accounting software solutions struggled to scale its internal resources to tackle proactive customer outreach. As a result, many of its small-to-midsize customers were not consistently engaged to foster license renewals. This increased the risk of customer churn, eroded renewal opportunities and revenue, and prevented visibility into customer growth and expansion needs. The client engaged MarketSource to provide targeted customer retention, renewal, upsell outreach and customer engagement continuity.



Dedicated Retention Specialists Drive \$2 Million in Renewal Revenue in 5 Weeks

KEYS TO SUCCESS

Dedicated retention team

Targeted renewal + upselling strategy

AI-enabled customer engagement center

[SOLUTION]

MarketSource deployed a dedicated inside sales team to target the client's small-to-midsize customers with outbound renewal and retention efforts. We started by identifying the appropriate decision-maker responsible for renewals and license purchases to initiate timely, consultative renewal conversations.

Outreach centered on securing annual software renewals while identifying upsell opportunities tied to customer growth, such as additional licenses driven by new hires or expanded client needs. By proactively engaging customers and addressing renewal questions before contracts lapsed, the team helped stabilize retention and reinforce long-term customer relationships.

This approach allowed our client to maintain continuity with its smaller accounts while expanding and securing annual recurring revenue and regain control over the renewal experience without overextending its internal teams.

Real-World Results

\$2M

in customer
renewal
revenue
secured in 5
weeks.



\$2M in Customer
Renewal Revenue
in 5 Weeks



Retained Nearly
\$40M in Annualized
Revenue



Annualized Revenue
58% Above
Quota

Within just 5 weeks, MarketSource's retention and renewal specialists secured more than \$2 million in license renewal revenue. To date, our team has retained nearly \$40 million in annualized license renewal and upsell revenue over the course of the program.

MarketSource, an Allegis Group company, is a sales acceleration company focused on delivering better outcomes for many of the world's most iconic brands. We design and operationalize managed sales and customer experience solutions in B2B and B2C environments. Our solutions are purpose-built and tech-enabled to deliver measurable improvements in business outcomes.