***STRICTLY CONFIDENTIAL***

**Client Database Extract**

**File Name:** Bastion\_Client\_DB\_2023.xlsx

**Database:**

| **Company** | **Client Name** | **Email** | **Phone** | **Recent Purchase** | **Contract Renewal Date** | **Client Needs** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Greenfield Inc. | Sarah Lim | sarah@greenfield.com | 555-0199 | Sentinel Basic | 2024-06-15 | High encryption standards | Interested in upgrading to Pro in Q3 |
| Core Solutions | John Hughes | john.h@coresolutions.net | 555-0211 | SecureConnect Pro | 2024-04-22 | Real-time threat monitor | Negotiating multi-year discount |
| Starling Co. | Diane Tran | diane@starlingco.com | 555-0245 | Sentinel Enterprise | 2025-01-05 | Insider threat detection | Needs additional support for mobile integration |
| UrbanWave LLC | Emma Wright | emma@urbanwave.io | 555-0321 | Sentinel Basic | 2024-08-10 | Remote security for staff | Requested demo of AI detection in real-time |
| MedTrust Healthcare | Carlos Vega | carlos@medtrust.com | 555-0345 | Sentinel Basic + DLP Module | 2024-11-17 | Data leak prevention (HIPAA) | Needs frequent compliance updates |
| NextGen Finance | Alan Smith | alan.smith@nextgenfin.com | 555-0422 | SecureConnect Enterprise | 2025-03-28 | High-frequency trading security | Considers Sentinel Suite as an add-on |
| EcoWorks | Jane Kim | jane@ecoworks.org | 555-0505 | Sentinel Basic | 2024-09-12 | Data encryption for remote workers | Interested in bi-annual threat workshops |

### **Client-Specific Needs**

1. **Greenfield Inc.:**
   * **Needs:** Requires advanced end-to-end encryption for all communications, especially in project-based client communications with high data sensitivity.
   * **Challenges:** Greenfield’s clients include government contractors, making them sensitive to even minor security gaps.
   * **Preferences:** Open to enhanced training sessions for their internal IT teams on data encryption protocols and threat prevention.
   * **Potential:** Interested in potentially adding AI-based intrusion detection if offered as an integrated bundle with Sentinel Suite.
2. **Core Solutions:**
   * **Needs:** Demands real-time threat intelligence and immediate incident response capabilities due to high transaction volumes involving client PII.
   * **Challenges:** Faces significant regulatory scrutiny in the finance sector, emphasizing the need for compliance-driven features.
   * **Preferences:** Prefers flexible reporting features for compliance audits; they would consider a premium tier with dedicated threat intelligence analysts.
   * **Potential:** Actively considering expansion into SecureConnect Pro but needs assurance of lower false-positive rates in threat detection.
3. **MedTrust Healthcare:**
   * **Needs:** Compliance with HIPAA and data privacy regulations, requiring real-time DLP (Data Loss Prevention) and automated compliance update alerts.
   * **Challenges:** Sensitive to regulatory penalties due to past incidents; demands high assurance and response time from Bastion’s support.
   * **Preferences:** Interested in frequent updates on healthcare-related cybersecurity regulations and HIPAA compliance integrations.
   * **Potential:** High potential for expanding services to Sentinel Enterprise, provided additional compliance monitoring features are included.
4. **UrbanWave LLC:**
   * **Needs:** Remote workforce support with a strong emphasis on mobile device security and cloud-based file encryption.
   * **Challenges:** Limited in-house cybersecurity resources; relies on Bastion for automated threat detection.
   * **Preferences:** Requests monthly check-ins for system updates and has an interest in demonstration sessions for AI-driven threat response.
   * **Potential:** Could potentially upgrade to SecureConnect, but there are concerns about AI’s real-time responsiveness, which could be a dealbreaker.
5. **NextGen Finance:**
   * **Needs:** High-frequency transaction security and encryption designed for finance applications where milliseconds count.
   * **Challenges:** Intense scrutiny on latency; delays can lead to substantial financial loss, so NextGen prioritizes rapid response and minimal overhead.
   * **Preferences:** Open to testing Bastion’s most advanced features with a flexible upgrade path, provided the service meets performance benchmarks.
   * **Potential:** Highly interested in competitor SentinelOne due to its low-latency model but may reconsider if Bastion can match the performance metrics.

### **Contract Renewal Dates & Negotiation Status**

1. **Greenfield Inc.:**
   * **Renewal Date:** 2024-06-15
   * **Negotiation Status:** Considering a multi-year contract but hesitant due to past support response times.
   * **Discount Requests:** Inquired about a 10% discount if they commit to a 3-year plan, contingent on support improvements.
   * **Vulnerabilities:** Competitors offering faster SLAs (Service Level Agreements) might attract Greenfield; a pilot for expedited support could secure their commitment.
2. **Core Solutions:**
   * **Renewal Date:** 2024-04-22
   * **Negotiation Status:** Negotiating for a custom support package that includes quarterly vulnerability assessments.
   * **Discount Requests:** Proposed 15% off in exchange for a two-year, multi-service package.
   * **Vulnerabilities:** Currently exploring offers from competitors with financial compliance expertise. Core is sensitive to price changes but values compliance-driven features above all.
3. **MedTrust Healthcare:**
   * **Renewal Date:** 2024-11-17
   * **Negotiation Status:** Likely to renew if Bastion continues to meet HIPAA compliance updates promptly.
   * **Discount Requests:** Interested in lower costs for additional compliance training, especially as they expand operations.
   * **Vulnerabilities:** If MedTrust faces delays or lacks regulatory support, they may consider transitioning to a competitor with more healthcare focus.
4. **UrbanWave LLC:**
   * **Renewal Date:** 2024-08-10
   * **Negotiation Status:** Minimal negotiation leverage; more concerned with performance reliability than discounts.
   * **Discount Requests:** None noted, though they have requested an introductory rate for SecureConnect’s mobile integration.
   * **Vulnerabilities:** Concerns over AI functionality suggest they could be persuaded by a competitor offering a robust non-AI solution for threat detection.
5. **NextGen Finance:**
   * **Renewal Date:** 2025-03-28
   * **Negotiation Status:** Prefers flexibility and performance assurances rather than strict contract terms.
   * **Discount Requests:** None yet, but would consider if latency improvements are rolled out.
   * **Vulnerabilities:** Actively evaluating SentinelOne for latency-based performance; Bastion risks losing them if response times do not meet expectations.

### **Internal Comments**

1. **Greenfield Inc.:**
   * **Comment:** Dissatisfaction with current support response times poses a significant risk. Known to prioritize service quality over pricing, meaning any SLA improvements could make them highly loyal.
   * **Insight:** Competitors might attract Greenfield by offering premium SLA guarantees. A retention tactic could involve creating a dedicated support pathway for Greenfield’s requests.
2. **UrbanWave LLC:**
   * **Comment:** Not fully convinced by the AI’s real-time capabilities; AI-generated false positives are a recurring issue, causing them to question its reliability.
   * **Insight:** A competitor offering a simple, non-AI detection system could appeal to UrbanWave. Bastion might consider offering an AI-free option or reducing false positive rates to meet their needs.
3. **NextGen Finance:**
   * **Comment:** Has voiced strong interest in SentinelOne’s latency-focused solutions for high-frequency transactions. Bastion risks losing them unless it matches or improves on those benchmarks.
   * **Insight:** NextGen values performance metrics above all; securing their business would likely require a dedicated, latency-optimized version of Sentinel Suite.