

ERP

“We have complex subscription contracts that take a team of people and a ton of effort to reconcile manually every month. We struggle especially hard with variable information that fluctuates from one billing period to the next. We know that we’re missing things and we’re afraid we’re not billing our customers accurately.”

– SaaS Software Vendor, Chief Financial Officer

BRINGING ORDER TO VARIABLE BILLING

A large SaaS company struggled with complicated subscription contracts that required very slow, resource-heavy reconciliation efforts to close out each customer billing cycle. Variable data that needed to be factored and charged with every cycle only exacerbated their challenges, and was a constant source of error. These difficulties often led to unhappy overcharged customers, or lost revenue as a result of not charging enough. Without a clear view of how much of those services customers were making use of and what promotions and exceptions were granted, it was impossible to charge accurately and on time every cycle for the sold and utilized services and products.

The sales force was likewise hamstrung by the lack of a consistent product catalog with a flexible

agreement model, and so they made the problem worse by creating a universe of slightly different products with different billing terms.

Without the proper system in place, the financial team was relegated to manual, time-consuming spreadsheet calculations, and a lot of educated guessing. There was no confidence that they were billing for everything or billing accurately for what they could be sure of, which led to lost revenue opportunities.

DISCOVER THE SOLUTION AND ITS IMPACT →

Need help with a problem like this?

Get in touch and we’ll work together to assess the challenges and opportunities of your project to find solutions.

CONTACT US AT
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THE SOLUTION

A FLEXIBLE, INTELLIGENT, MIDDLE-WARE COMPONENT

The solution was a flexible, intelligent, middle-ware component that acted as the master system of record for agreements. It instituted an extensible and flexible model for each contract, automatically calculating the necessary fees at every charge cycle, before exposing those charges to the invoicing system for distribution to customers.

- **A service oriented middleware component that sits between the sales and back office systems**, providing sales with a framework for rapid creation of complex sales agreements, and billing with the ability to easily charge for them.
- **Clean integration with their Sales/CRM and General Ledger infrastructure.** Easily extensible and able to work with any major Sales, CRM, Licensing, General Ledger, or Invoicing systems.
- **Intuitive User Experience tailored to the needs of the Finance Department**, designed for easy and efficient management of agreements and subsequent billing details.
- **Ability to create a straightforward and dynamic product** and service catalog that no longer needs to expand needlessly to support **variations negotiated during the sales process.**

THE IMPACT: NO LOST REVENUE AND DRASTICALLY REDUCED CYCLE TIMES IN THE FULL ORDER-TO-CASH CYCLE

Improved billing process

- Onerous manual processes and spreadsheets transformed into a reliable, consistent, automated system, reducing month-long reconciliation tasks into a few days of efficient coordination, and lifting a monumental burden on the finance organization.
- Increased confidence in data accuracy and data cleanliness with auditable, traceable numbers.

Strategic focus

- Finance team is able to focus on more strategic initiatives, rather than incessantly chasing a monumental pile of billing tasks.

Better enablement for growth

- The business is able to grow and expand their product catalog and service offerings without being limited by their ability to reliably charge for them.

Optimized product catalog

- Optimized product catalog to empower consistent sales efforts by the Sales staff.