

Mobile-first Storytelling and Commerce Platform Finds Subscription Success with Estuate



The Client

The client is a mobile-first storytelling and commerce platform that delivers app-like user experiences in bite-sized pieces through the mobile web. The 'Narrative Web' is the native app alternative, enabling unprecedented engagement, activation and conversion for brands, publishers, and digital businesses. Through its unique authoring tools and SaaS platform, the client creates opportunities for companies to create new business models and deeper relationships that cultivate loyalty and lead to increased revenue and profitability.

Business Challenge

A major subscription-based product launch in 2015 made it clear that the client needed a solution optimized for subscription payment handling, and one that would help retain subscribers and while acquiring new ones. The client launched its new product at Dreamforce 2015, and their next major challenge was to obtain a stable revenue stream and a billing platform to support it. They needed a solution that automated their billing processes, would save both time and money, and minimized the resources spent collecting and tracking payments.

The Estuate Solution

Estuate worked with the client to implement Zuora and configure it to match the company's preferred processes. On the backend, Estuate and the client's IT team integrated Zuora with internal systems.

Solution highlights:

- Installed and configured Zuora's managed packages for Quotes and 360 sync.
- Defined sales assisted flow to create quote and convert into order/subscription in Zuora.
- Helped set up access permissions to Zuora functionalities based on sales representative's profiles.
- Helped implement processes to manage subscription upgrades, downgrades, renewals and cancellations and free trial for 30 days.
- Assisted to build web portal for self-service customer to sign up through their website and create subscriptions.

- Enabled secure electronic payment method (Credit Card and ACH) capture and integrated the information directly with Zuora through Salesforce.
- Helped extract reports from Zuora and Salesforce for key metrics on opportunities, quotes, subscriptions so they can accelerate the sales and marketing strategy.
- Implemented Zuora's subscription billing platform to build and operate their subscription business with recurring revenue recognition.
- Guided on tracking and upload usage to track overages in Zuora for billing purpose.

Zuora's 9-principles methodology served as a foundational blueprint for building the client's subscription-based business:

Pricing: As a startup, the client needed product offerings to meet current market trends in their subscription business stream and ensure future growth. Estuate did onsite design workshops to understand its offerings and pricing strategy, and helped transform them into Zuora's language.

Acquire: The client's business model included customers from both B2B and B2C channels. Estuate identified and documented the differences in recurring billing for B2C and B2B companies. Estuate helped the client offer a solution that maximized revenue and minimized the risks involved.

Bill: The client needed to bill their customers during initial sign-up, prorate customers who had signed up in the middle of the month, or upgrade/downgrade their services. Also, there were several parameters that needed to be measured and overages billed based on the usage charge model in Zuora. Estuate helped the client configure their billing operations by suggesting best practices around Zuora billing operations, and usage upload API.

Collect: The client processed payments via Credit Card, Check, ACH and wire transfer. Estuate helped the client optimize their payment collection framework with suitable configurations and customizations. Estuate also helped them configure their refund categorization framework for better refund management.

Nurture: The client offered anytime upgrades and downgrades/cancellation through the B2B channel. Estuate helped the client's sales team build processes around Zuora's amendments for upgrades, downgrades, renewals and cancellations.

Account: Estuate configured Zuora's advanced features to work seamlessly with Quickbooks. Estuate also helped the client streamline their accounting-close process and maintain compliance.

Measure: Estuate built custom reports to measure customer success in real-time. These reports helped the client make accurate and timely decisions, leveraging key metrics from bookings through revenue recognition that provided unparalleled insight into customer value.

Iterate: Estuate provided best practices to rapidly iterate on pricing models to maximize subscriber acquisition and market share when needed.

Scale: With Estuate's solution, the client could seamlessly integrate Zuora with their commerce systems, payment gateways and other technology systems to match with their high growth rate and ensure that it could continue to scale with their growth.

Business Impact

- Accelerated cash collections and made the billing process more expedient and accurate by integrating Zuora, Salesforce and the client's web portal.
- Facilitated better customer relationships by giving complete visibility into billing and payment information.
- Helped scale up the business and close the deals early by providing options to identify opportunities for upsells and add-ons.
- Streamlined billing processes and recognize recurring revenue which helped in tracking company's growth and performance which is essential for any startup company to strategize their next move or decisions.

Get Started Today

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