

# Unified Compliance Framework Accelerates Revenue and Improves Partner Engagement with Estuate Solution



## Background

Unified Compliance Framework® (UCF) has developed ground-breaking tools to support IT best practices with a special focus on regulatory compliance, metrics, systems continuity, and governance. Developed in 2005, the Common Controls Hub, the SaaS portal built on to the Unified Compliance Framework®, is Unified Compliance's flagship product. The UCF's content and methodology is the direct result of their deep understanding of IT regulations and standards as well as decades of experience consulting for clients, publications, and vendors in the mission-critical IT arena.

## Business Challenge

UCF wanted to leverage their partners/reseller network to expand sales of Common Controls Hub (CCH), their flagship product. The resellers managed the contract with the end user. UCF used Zuora to bill their Resellers upfront annually. For each new customer, UCF had to create a billing account in Zuora and associate the subscription so that they could bill that reseller. This was a manual process and had to be followed diligently since resellers had to receive the invoices based on when the subscription contract was signed. This process needed to be streamlined and automated.

UCF had 2 different types of customers:

- Basic User - A customer who was not associated to a parent company and did not have access to the company's domain.
- Whitebox User - A customer who was tied to a parent company and had access to the company's domain.

This meant that:

- Products sold to a basic user were different from the products sold to a whitebox user.
- Whitebox customers were to be mapped or tied to a parent account (parent-child hierarchy).

## The Estuate Solution

Estuate delivered a solution based on Zuora's nine principles framework.

- 1. Price:** UCF was already using Zuora and needed it to cover the same products that were sold to their partners. Existing products that were configured in Zuora were populated onto the reseller portal. Estuate also provided flexibility to UCF administrators to associate discounts to the reseller through the reseller admin portal. These discounts were applicable to all the purchases made by the resellers for their various customers.
- 2. Acquire:** Estuate reviewed UCF's use cases and designed an architecture that best suited their requirements. The solution was integrated into Zuora billing engine on the backend. The portal allowed resellers to:
  - Create, update or cancel subscriptions.
  - Deactivate a Zuora billing account.
  - Make use of the invoice owner functionality of Zuora.
  - Retrieve an existing billing account information from Zuora
  - Associate parent-child relationships in Zuora.
  - Send email notifications to end users when resellers were disabled.

A new reseller admin portal was built to:

- Allow UCF admins to create resellers profiles.
  - Deactivate resellers.
  - View the end users associated with resellers.
  - Export the reseller details.
- 3. Bill:** UCF's plan was to bill their resellers for their deals while keeping the reseller and end-customer relationship outside the Zuora eco-system. To further automate this process, Estuate configured "scheduled bill runs" for resellers to automate the billing process in Zuora and automatically send invoices to customers on a daily basis. This was achieved by associating the resellers to the "reseller billing batch" in Zuora and by enabling "auto-post of invoices" and "email to customers" processing rules - both advanced capabilities of Zuora.
  - 4. Collect:** UCF had configured a payment gateway during their phase I implementation. But Estuate recommended manual payment operation to minimize risk during the early stages of the implementation. This process was automated in the later stages of the implementation.
  - 5. Nurture:** UCF wanted to offer resellers to perform:
    - Upgrades/downgrades - resellers had to be able to add/remove products from their existing subscriptions for a specific account from the reseller portal.
    - Cancellations - resellers were allowed to cancel a subscription from the portal while ensuring continuity of services till the end of the invoice period term.
    - Owner transfer flexibility - Estuate also incorporated an option that would allow end customers to be moved between resellers.
  - 6. Account:** Estuate helped UCF understand the Zuora finance process of exporting summary level journal entries into their accounting system Quickbooks Online. Estuate also trained UCF to run trial balance, journal runs and revenue reports from accounting periods and also on closing an accounting period.

**7. Measure:** Estuate helped UCF leverage out of the box Zuora reports and configured various communication profiles for end customers and resellers.

**8. Iterate:** Using the detailed step-by-step process guide provided by Estuate team, UCF was able to create additional products in Zuora over the next few months and roll it out to their resellers in the portal.

**9. Scale:** UCF was onboarding resellers who had an existing customer base. Estuate helped UCF easily migrate or scale up their reseller accounts.

## Business Impact

This solution had a tremendous impact on the UCF's Partner's business. UCF were able to increase their partner business and the end customers that were brought by these partners.

- Enhanced customer satisfaction and increased retention with a streamlined payment processes.
- Realized higher recurring revenues and saved time on recurring billing processes.
- Increased productivity and business processes efficiency.
- Simplified financial management by customized integrations with Salesforce for reporting and analysis.

*"At UCF, we were transforming our traditional sales offerings to help our partners and customers take advantage of only what they needed through different tiers of service using Zuora's system of products and rate plans. We needed a partner with deep and broad experience in the Zuora ecosystem, capable of training our people, deploying the system, and ensuring that business requirements were accurately tracked and implemented. Estuate exceeded these requirements and was the key to the success of our project."*

**Dorian Cougias,**

Co-founder of Network frontiers and lead Analyst at UCF

Get Started Today

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