



## **Estuate modernizes subscription services of a supply-chain-risk-management global leader**

The client is a leading ISO-certified US MNC in the space of comprehensive and integrated supply-chain-risk-management solutions. The company's SaaS safety and compliance platform, data integrity and verification practices, and standardized safety training programs empower leading organizations to drive safety and compliance into their supply chains and down to the worker level. The organization was founded in 1993. It is headquartered in The Woodlands, Texas.

# 1. Business Challenge

The company needed a smooth-functioning subscription platform for its myriad customer-facing operations. In functional terms, the client wanted to:



Simplify and automate various subscription-based operations



Track subscription metrics for smooth sales and finance functioning



Stop billing customers who order above a pre-decided capped amount



Smoothen the year-end subscription renewal process for its customers



Provide the first connection to customers free of cost



Align the subscription platform of its acquired Canada-based company

## 2. Estuate Solution

Estuate leveraged its prowess in applications & technology to come up with comprehensive solutions for the client.

- Implemented leading **enterprise subscription management platform Zuora** at the client-side
- **Built custom process automation solutions** in **Zuora, Salesforce CRM**, and the client's front-end platform
- Designed a **custom Salesforce calculator** to track all incoming orders including first orders
- **Generated 300+ Zuora and Salesforce custom reports** for various sales and finance requirements
- **Automated a custom flow** for the year-end subscription renewal process
- Coordinating with the acquired company for **custom Zuora/Salesforce solutions and CAD & Canadian taxes set-up**

# 3. Business Impact

The client derived excellent outcomes by leveraging the Estuate-Zuora synergy.



Streamlined subscription offerings and the billing process



Eliminated manual interventions in the quote-to-cash process



Drove key sales & finance decisions using custom subscription metrics



Efficiently handled PAYG and annual subscription switches during renewals

# Talk to our experts

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## About Estuate

Estuate is an ISO-certified, global Product Engineering and IT Enterprise Services company headquartered in Milpitas, California and with offices in Canada, India & the UK. The company specializes in leading-edge technology solutions such as Digital Transformation Solutions, Product Engineering Services, Data & Analytics, Subscription Billing, Revenue Management & Governance, and Risk & Compliance. It carries proven expertise across Healthcare, Hi-tech, Retail, Finance, Software, and Insurance domains. Estuate services reflect extreme customer service and extraordinary results.

