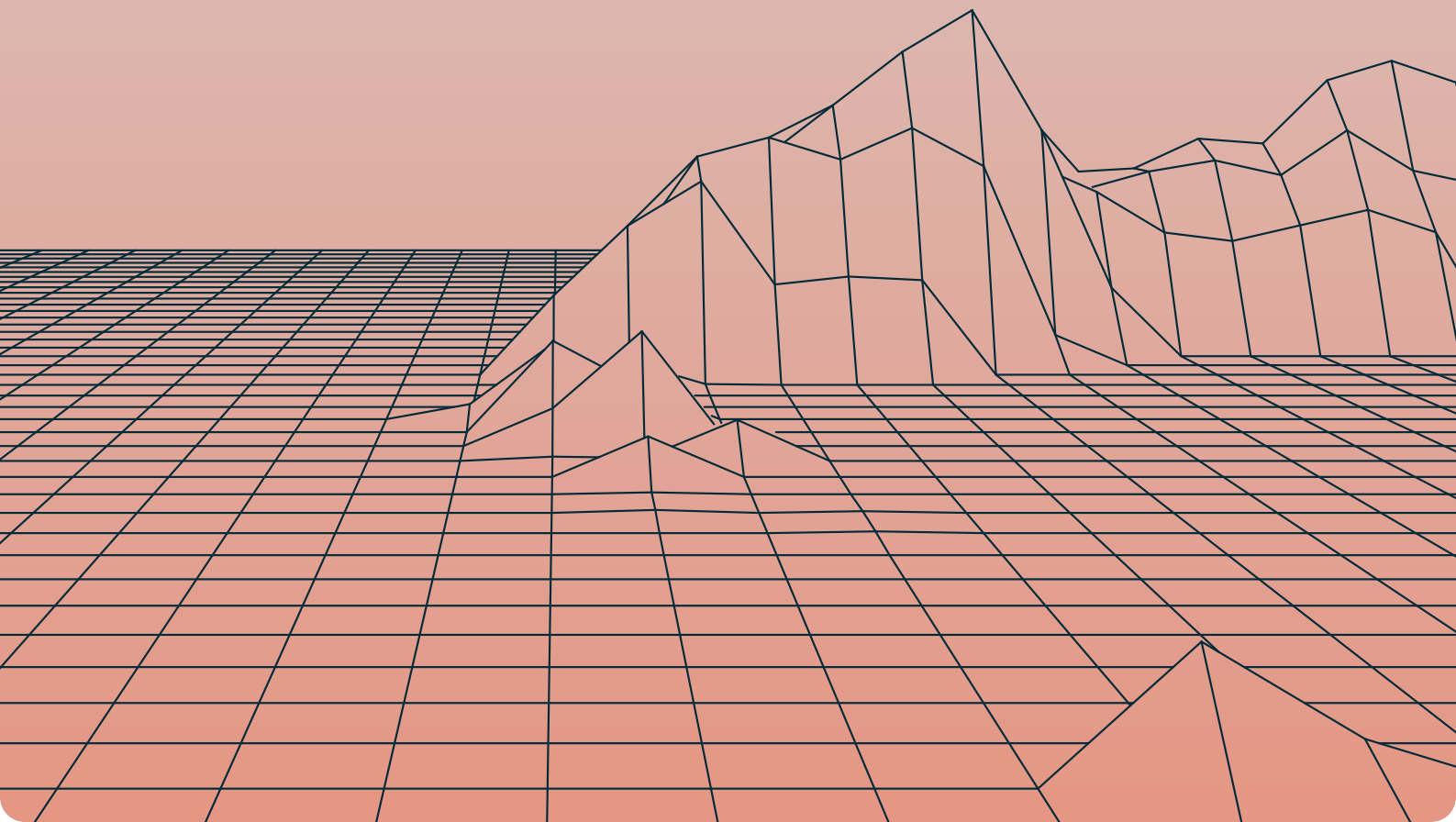
chargebee

# Subscription and Revenue Growth Management Buyer's guide



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# 01 Introduction

Switching to a Software-as-a-Service (SaaS) model or using SaaS pricing while managing subscription revenue can be difficult, especially for global businesses.

## Simplifying revenue operations is crucial for:

- Sales teams to enter markets faster and expand into new areas.
- Finance departments to optimize revenue, reduce customer loss, and use flexible pricing models.
- Engineering and product teams to create innovative, scalable systems that integrate smoothly with existing ones.

## Organizations need the right revenue management tools to:

- Seamlessly implement product-led growth strategies
- Eliminate data silos with integrated processes from quotes to payments
- Reduce delays in payment collections and minimize manual efforts
- Comply with global tax, invoicing, revenue recognition, and accounting rules
- Use creative strategies to prevent customer loss
- Improve customer satisfaction through clear communication and fair billing
- Promote data-driven decision-making at all levels

This buyer's guide is a comprehensive resource created for C-level executives and department leaders. It provides the insights and solutions needed to evaluate, select, and implement the best revenue growth management solution to help streamline operations and drive effective growth and success.

## This Subscription and Revenue Growth Management Buyer's Guide will cover four important aspects:

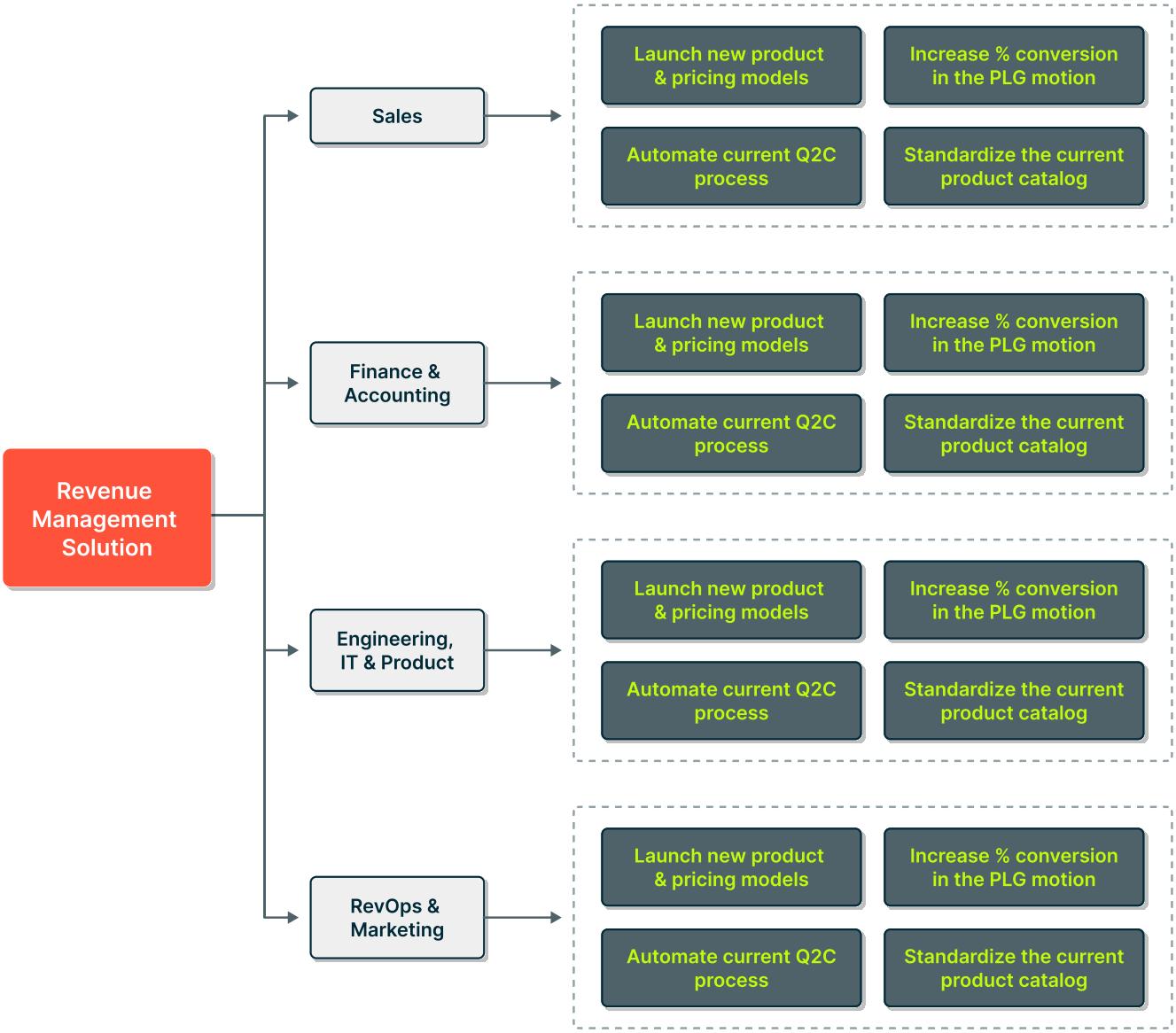
- **Identify critical gaps** in current revenue management process.
- Develop key requirements **for user adoption and flexibility.**
- How to **select a solution** that scales with company's growth.
- Finalize a solution with **seamless integration.**

# 02 Planning Considerations

## Well-defined plan and clear end goal

Choosing the right solution can be overwhelming, especially if you've been using in-house tools that are slow to adapt to changes. To overcome this challenge, start by clearly defining the problem you want to solve and the goal you want to achieve. Once you know your desired outcome, work backward to create a detailed plan.

**Here are some examples of end goals based on different business functions and their objectives:**

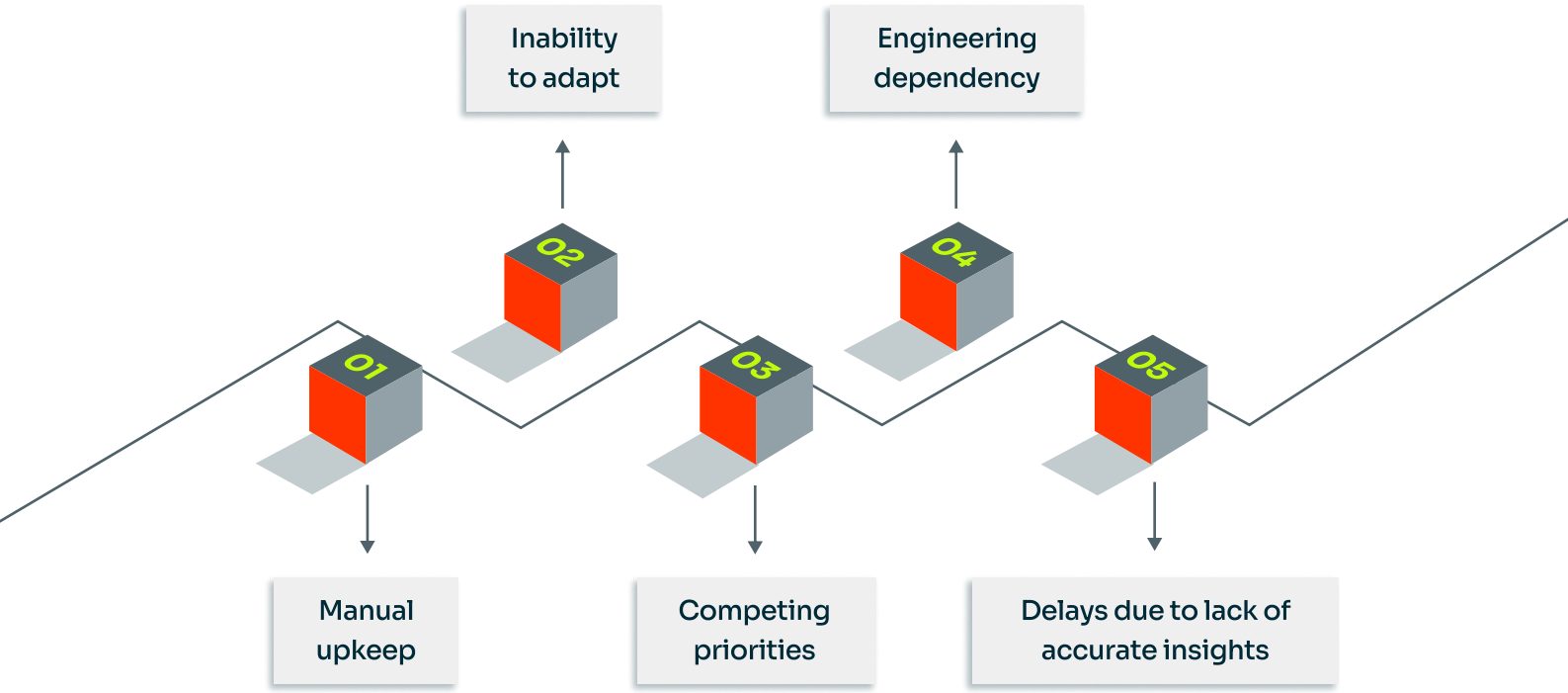



How Whereby transformed its revenue management system and eliminated manual work, custom developments, and the diversion of engineering resources

Bonus read

## Identifying friction points

Pinpoint the internal challenges that are slowing down growth and preventing you from reaching your goals—there could be many causes. Outline the short-term and long-term benefits your organization can gain from using a strong system to address these obstacles effectively.




## Internal stakeholder alignment

A revenue growth management system affects many people within your organization. Changing any important system can mean moving away from long-standing processes and policies. It's essential to involve all key stakeholders in the evaluation process to capture their expectations from the beginning. This way, you can implement an effective change management plan for each team once a decision is made.

**Stakeholders critical for evaluating a revenue growth management solution include:**

- **CXO alignment** - CXO buy-in ensures that the transformation is a priority and aligns with the overall business goals and objectives.
- **Board alignment** - Having board of directors buy-in ensures less resistance to innovation and encouraging stakeholders to align with the long-term vision.

- Sales
- Revenue Operations
- Finance
- Accounting
- Engineering
- Customer Support
- Product
- IT
- Digital Experience

As a project's scope grows to include more internal teams, the risk of adding unnecessary tasks increases. Beginning with a clearly defined end goal is crucial, as it sets the boundaries for your project's scope.

## External references

Don't hesitate to ask for help during the software acquisition process. Here are some resources you can use for guidance:

| | | |
|---|---|---|
| 01 | **Customer review sites** | Platforms like G2 provide unbiased reviews from individuals with firsthand experience with the vendors you are considering. |
| 02 | **Professional networks** | Use your network to gain knowledge. Someone with firsthand expertise and experience with your project or vendors may be able to offer insightful guidance. |
| 03 | **RFP Templates** | Make use of vendor-supplied RFP templates. These resources can help you construct your criteria by covering common evaluation questions. |
| 04 | **Past experiences** | Draw on past experiences with systems and processes. Positive and negative encounters provide valuable insights for new evaluations. |
| 05 | **Consulting firms** | Explore consulting firms for comprehensive support. From domain expertise to evaluation guidance their input can be invaluable throughout the process. |
| 06 | **Customer references & testimonials** | Review the testimonials and case studies provided by the vendor and check whether the vendor has delivered the expected results. |

## Finalize findings

Consolidate the findings from each stakeholder and business process. Once you have completed the above steps, you will have clear answers to the considerations below.

- What challenges do subscriptions currently present?
- Who within the organization is affected by these challenges?
- How can a new solution alleviate existing friction points?

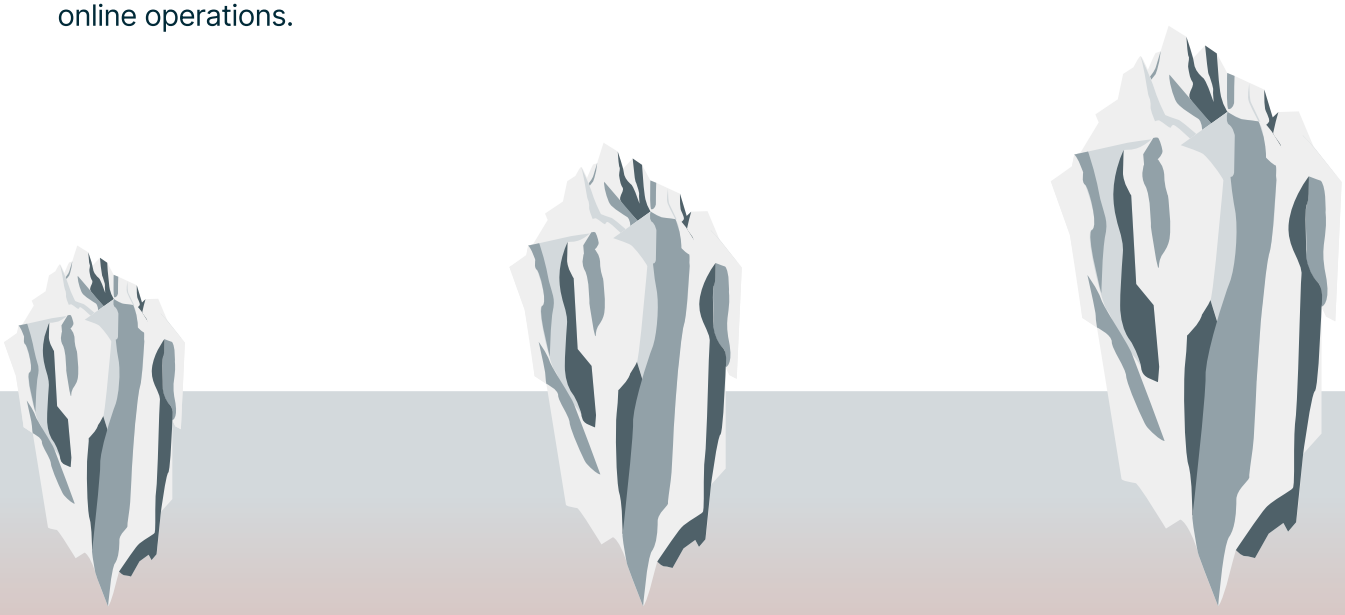
- When do I want a solution in place?
- In what ways will a system benefit and support my team?
- Are there planning resources provided by the vendor?

# 03 Identifying Value Drivers

Any business undergoing this transformation must foster a culture that not only accepts change but actively seeks innovation and continuous improvement. Providing necessary training and support for teams is essential for success. The organization must want to seamlessly integrate new digital technologies into its existing infrastructure.

The focus should be ensuring compatibility, avoiding silos, and building a connected ecosystem that facilitates growth. Last but not least, data-driven optimization is fundamental. Robust data governance and analytics are the tools for personalizing customer experiences and making informed decisions that drive sustainable revenue growth. Let's quickly look at the challenges which enterprises might face during such a  transformation journey

- **Stage 1: Prove the concept:** At this stage, the concept must demonstrate business success, technical suitability, and cultural compatibility. Even though it's early in the process, subscription pricing needs to comply with legal and financial requirements, data must be sent to the data warehouse, uptime has to be guaranteed, and plan configurations should align with product entitlements.
- **Stage 2: Scale Recurring Revenue:** At this stage, subscriptions are becoming a key source of revenue. To support this growth, it's important to integrate end-to-end CRM systems for a single source of truth, roll out services across multiple regions, track product pricing histories, recognize revenue by business unit or geography, and ensure compliance with regulations.
- **Stage 3: Transform the Business:** At this stage, most of the revenue comes from subscriptions. The business has fully transitioned from one-time sales to recurring revenue and from offline to online operations.



**Prove the Concept**
**( $0 - $1M )**

**Scale**
**( $50 - $250M )**

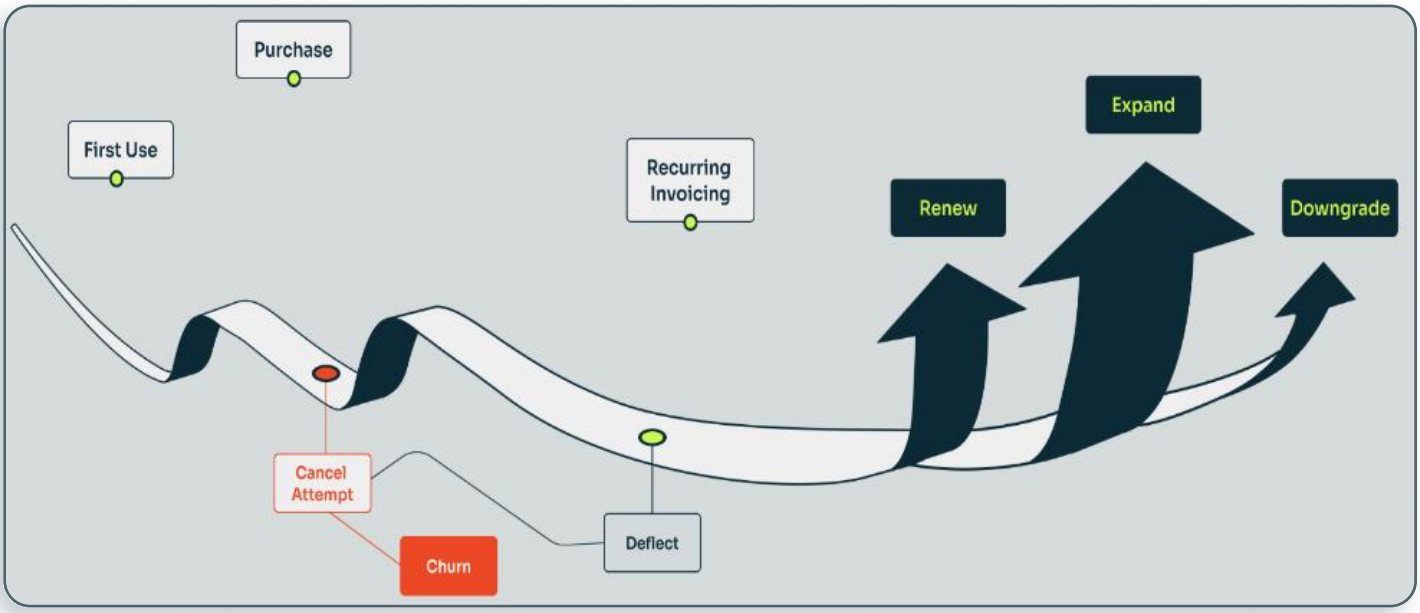
**Transform**
**( $250M+ )**

# 04 Critical Features

## Subscription management & recurring billing

Properly defining your subscription management requirements is crucial, particularly when it comes to overseeing the subscription lifecycle. Numerous events can unfold during a subscription term. At a minimum, each subscription involves:

- Trial or free subscription onboarding
- Generating the initial invoice/transaction record
- Collecting associated payments
- Recognizing revenue for service provision
- Renewing the subscription at the term's conclusion



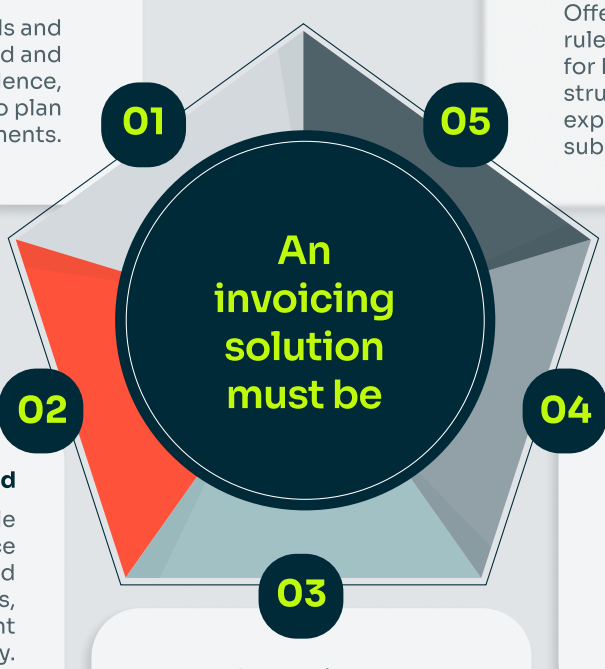

Overlooking any of these aspects can lead to more work for your team down the line. Look for systems that are "future-proof"—able to manage current needs and adapt to future changes.

## Key considerations

- What processes can be automated and improved to acquire more subscribers?
- Can contract renewals be tailored to meet the customer's needs?

- How can we make billing more transparent and fair for customers?
- Is the current system able to communicate effectively with customers?

# Key aspects of an invoicing solution




**Accurate & predictable**

Reflecting the goods and services purchased and occurring on a set cadence, enabling customers to plan their financial commitments.

**Globally compliant**

Offers support for global tax rules compliance, regulations for Invoice & credit notes structuring, Cancellation experience and history of subscription lifecycle.

**Clear and consolidated**

Capable of combining multiple purchases into a single invoice to minimize disruption and clearly outlining terms, additional fees, and fulfillment criteria for clarity.

**Transparent communication**

Offering proration for mid-term changes or partial-term product purchases and provide timely notifications about subscription endings, price increases, or special offers.

**Customizable**

Allows multiple payment methods, Invoice customization & configuration, branding and payment retry configurations.

## Expectations from an invoicing solution

| Subscription lifecycle management | Trial and coupon management | Automated recurring billing and invoicing |
|---|---|---|
| Automate the essentials of subscription lifecycle management like nudging trial users to the paid plan, collecting customer payment details, managing upgrade or downgrade, managing chargebacks and cancellations. | Trials can be the perfect way to enhance the PLG motion. Top funnel acquisition can be increased with free and paid trials. Assisted SLG would also require an easy to use discounting strategy. | Automate the process of billing all customers on a specific date or sign-up date, or even set specific billing dates. Give the option to bring all charges across multiple subscriptions, add-ons, and more into a single invoice. |
| ✓ Upgrades, downgrades, renewal management<br>✓ Multiple payment methods<br>✓ Proration calculation<br>✓ Proration calculation<br>✓ Payment details collection<br>✓ Revenue recovery automation<br>✓ Global and regional payment methods<br>✓ Chargeback management | ✓ Trial management<br>✓ Coupon & discount management<br>✓ Gift subscriptions<br>✓ PCI Compliant checkout with low code integration<br>✓ Email notifications<br>✓ Entitlement management<br>✓ Self-serve portal<br>✓ Reactivations | ✓ Flexible billing cycles<br>✓ Usage-based billing for fair billing<br>✓ Advance invoices and consolidated invoicing<br>✓ Contract terms management<br>✓ Automated EU-VAT, US Sales Tax, Australian GST<br>✓ Compliant e-invoices<br>✓ Automatic accounting reconciliation |

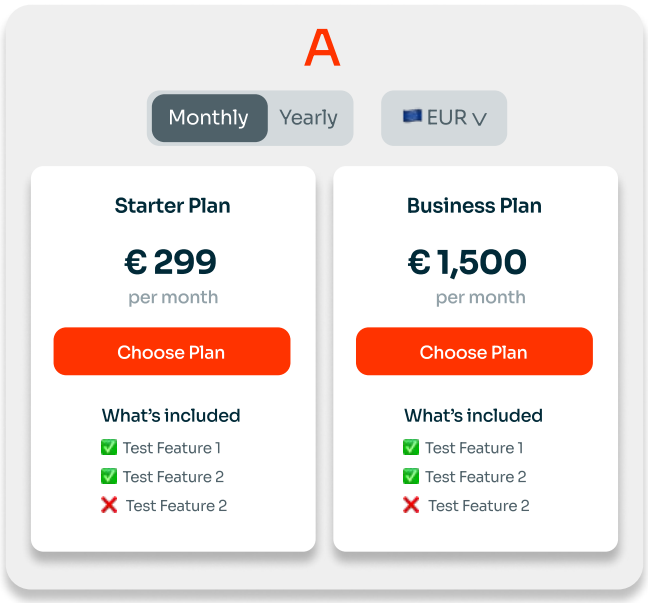
# Pricing and revenue optimization

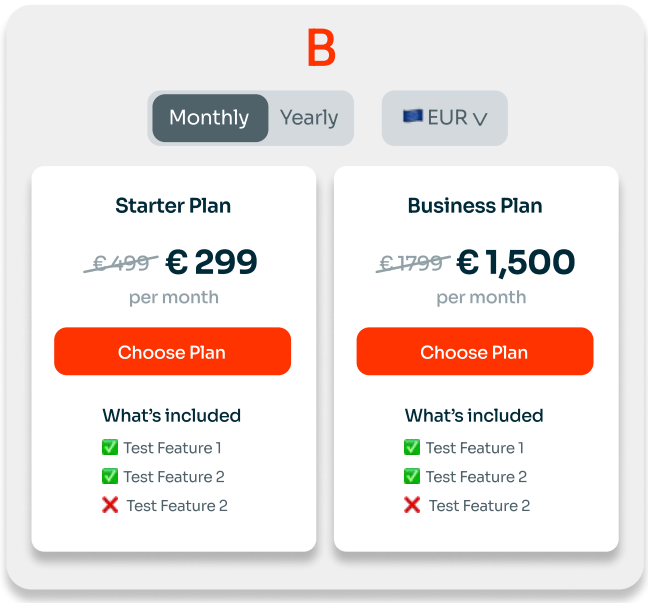
Today's consumers demand greater options when making purchases. In the commerce landscape, product pricing strategy and revenue optimization significantly impact the success of any business. As you navigate your procurement journey, recognizing the importance of a pricing strategy aligned with your objectives is crucial.

**Key aspects to look out for:**

- Launching new pricing models - Per Unit, Tiered, Volume, Stairstep
- Ability to roll out and customize new product bundles rapidly
- Offering flexible billing frequencies
- Grandfather old ones with no developer dependency.
- User-friendly management of your price book
- Hybrid pricing model support
- A/B testing in a low code/No code solution
- Insights from pricing experiments: visitors, checkouts, abandoned carts
- Managing entitlements for new products

**A or B?** A/B testing enables you to experiment with different pricing scenarios, measure their impact, and refine your approach based on real-time data. This data-driven approach empowers your business to make informed decisions, ensuring that your pricing strategies are not only effective but also aligned with the preferences of your target audience.




## Key considerations

- How easy is it to create new products and bindles with no impact to existing subscribers?
- Does the solution facilitate A/B testing? Is it easy to do?

- Does the solution support launch of new pricing strategies without dev effort?
- Would backend systems require a lot of changes to launch new products?

# Global payments and expansion

In today's world, businesses operate globally, making a global partner essential. Whether you're a large corporation or a growing company, working with global payment partners and localizing your services offers numerous benefits that improve efficiency and success. This section highlights the key reasons why having a global partner is beneficial for your business.

## Key aspects to look out for:

**Payments & transactions:**

- Transacting in multiple currencies
- Deliver geo-specific experiences
- Control payment gateway costs - manage revenue leaks from gateway fees and currency conversions
- Multi-language support
- Local payment methods

**Global compliance for expansion:**

- Navigating evolving tax regulations across the globe
- Data storage, security, and accessibility
- International partnerships
- Comply with global tax
- Automate compliance

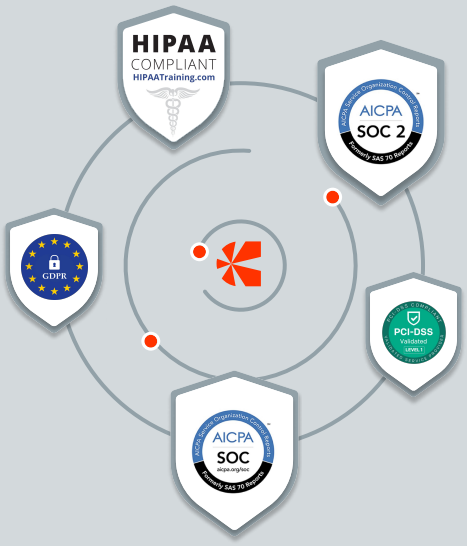
## Global payments and expansion

stripe · checkout.com · adyen · BlueSnap · amazon pay · PayPal · GoCardless · authorize.net A Visa Solution

## Popular payment methods

ACH · SEPA · Apple Pay · pay · G Pay

Credit cards, Direct Debit, PayPal, and more




## Global Tax Support:

Avalara · TaxJar a stripe company · VERTEX · anrok

## Key considerations

- How easy is it to offer multiple currencies and set different price points depending on currency?
- Does the current system work with regional payment partners and payment methods?
- Does the solution allow to work payment configurations without dev effort?
- Does the current system comply to global regulations related to data, security and accessibility?

## Revenue recognition and compliance

Ensuring accounting compliance is crucial for an organization's growth. Adhering to standards like ASC 606 and IFRS 15 is more than a formality—it can significantly impact your ability to succeed. If you're a small private company thinking, "We aren't audited; this isn't a concern right now," it's time to rethink. If your growth strategy includes fundraising, potential investors will scrutinize your financials closely. In today's competitive VC and investment banking environment, having unaudited financials can stop discussions before they begin.

**For publicly traded companies, compliance is a serious responsibility with severe consequences for mistakes. A flawed audit can lead to:**

- Financial hardships
- Increased audit expenses
- Penalties
- Legal repercussions
- Damage to brand image
- Financial restatements

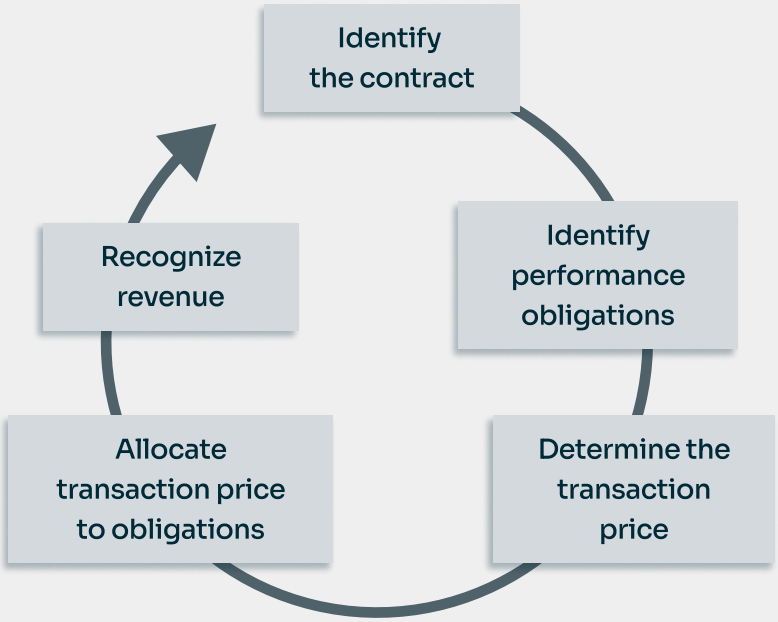
### Multi-element arrangements

Revenue allocation to individual components, different delivery criteria, proportion of transaction price adds to the complexity. Automation is the key to future-proof your processes.

### Managing change

Contract events like extensions, upsells, downgrades, early renewals, and credit notes all signify substantial changes to recognized revenue and require robust system to handle it.

### Automated compliance with the 5-step recognition model




## Key considerations

- How easy is it to offer multiple currencies and set different price points depending on currency?
- Does the current system work with regional payment partners and payment methods?
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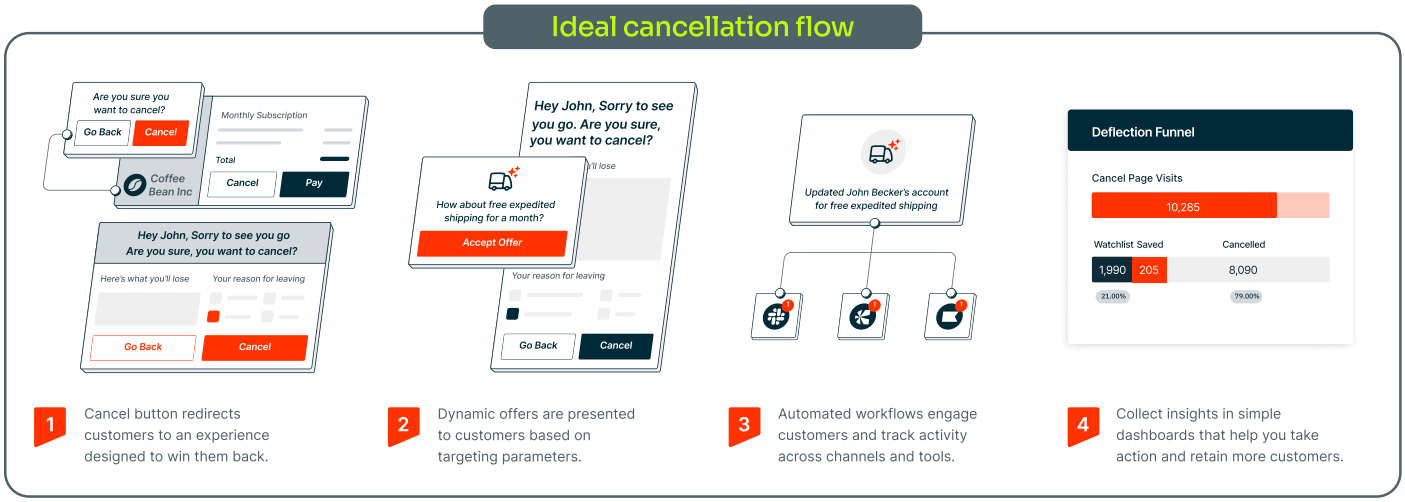
# Churn management & retention

It's widely known that acquiring a new customer can cost five times more than retaining an existing one. Subscription businesses face an added challenge: the virtual nature of their transactions often means there's less direct human interaction, making it harder to understand and address why customers leave. When choosing a revenue management solution, it's vital to consider your churn metrics and set clear goals for improvement.

Effectively managing churn—the gradual loss of customers—is essential for maintaining a thriving business. When looking for solutions to manage churn, focus on key features like insights and analytics, a proactive retention approach, and automated churn deflection processes that offer subscribers more options before they decide to leave.

**A strong solution should:**

- Provide a personalized cancellation experience
- Offer dynamic deals based on targeting criteria
- Engage customers and track activity across multiple channels
- Gather insights to help you develop a churn mitigation strategy
- Use a low-code/no-code approach for easy strategy implementation
- Present loss aversion prompts at the right moments in the customer journey
- Send personalized messages before customers reach the point of cancellation
- Create tailored offers for at-risk customers 0




## Key considerations

- Does the current system provide churn analytics to help identify at-risk customers?
- Is the team able to launch automated churn mitigation strategies?
- Are the current measures against churn effective and how much revenue is retained?
- Does the system allow custom offers for different customer segments and products?

Condé Nast's Value-Driven Journey to Increased Subscriber Retention Bonus read

## Product integration and marketplace

Integrations are essential for improving the functionality and capabilities of any revenue management solution. They allow different systems and applications to communicate and share data seamlessly, eliminating the need for manual data entry or duplication. This saves time, reduces effort, and minimizes the risk of errors. Integrations also enable you to use the features of other solutions, providing a more complete service to your customers.

**Poor integration capabilities can lead to:**

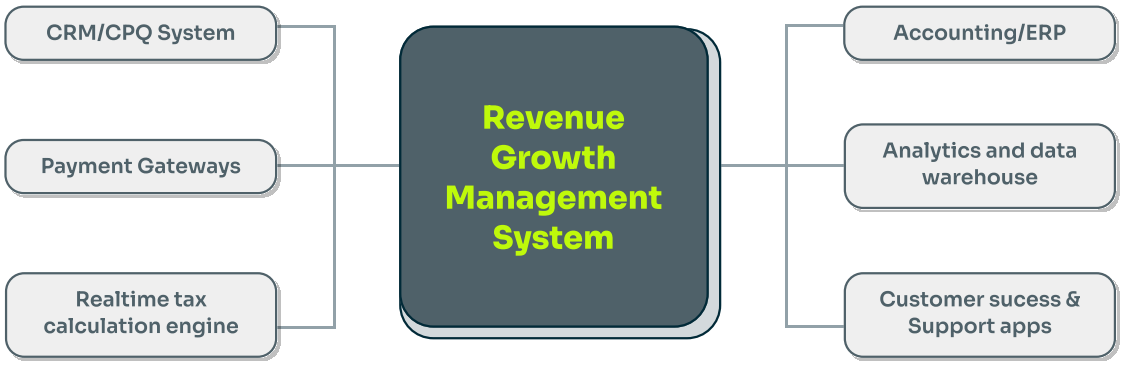
- Ineffective and delayed decision-making
- Key information being inaccessible to certain departments
- Inconsistencies and confusion within teams

A revenue growth management system should address these inefficiencies by integrating with various parts of your tech stack, ensuring consistency across your business. It acts as a bridge between your front-end operational systems and your financial back-end.

Learn how Gitkraken transformed its subscription billing

## Marketplace

The revenue management system should offer a comprehensive marketplace that enables customization and scalability, accommodating evolving business needs by offering expanded functionality through diverse integrations and add-ons. Some key partnerships to look out for during the evaluation - Number of Payment Service Providers (PSP) & Independent Software Vendor (ISVs) and local Solution Partners & Agencies.




## Key considerations

- Does the system seamlessly integrate with current tech stack?
- Does the system provide robust APIs for real-time data sharing?

- Does the system provide multiple avenues to extract data points?
- Does the system provide native integrations for business critical applications?

# Analytics & Reporting

Data drives decisions. Subscription analytics and reporting play a pivotal role in helping you make informed decisions and optimize your subscription-based models. With the multiple 'perspectives' of revenue: recurring revenue, received revenue, recognized revenue, and retained revenue, a subscription management platform native analytics and reporting must provide insights into each. Every function in a company requires a specific metric view which would be relevant for their strategy implementation and progress monitoring.

- **Accounting** should have a view on GAAP reporting, Deferred and recognized revenue, tax reports by jurisdictions and exemption reports.
- **Finance** should have access to critical metrics like invoiced revenue vs collected revenue, AR aging, cashflow, payments & refunds.
- **CXOs** should have better predictability through reports on MRR & ARR growth, total upcoming renewals, billing, retention & churn.
- **Marketing** should be clear on signups, activations, MRR cohorts, leakage and net dollar expansion to see the impact of their acquisition strategies
- **Sales** should have a clear view on revenue metrics like new MRR, expansion MRR, upgrade MRR, coupon performance, segmented by variables.
- **Customer Success** should be able to look at subscription and revenue churn, upgrade and downgrade MRR, net churn rate and customer cohorts.

### Facets of a solution which enables data-driven decision making

**Ease of use**

Easy-to-use dashboards, widgets, and straightforward navigation tools which contribute to a smooth user experience.

**Flexibility**

Customizable reporting, flexible timeframes, ability to delve into specific metrics empower users to customize reports based on their unique needs.

**Accuracy**

Near real-time data reports which reflect the most current information. Including data validation mechanisms and error-checking processes.

**Automation**

Automated reports in a customizable timeframe directly into users mailbox provides opportunities for proactive action for each function.

## Key considerations

- Does the system provide easy access to essential subscription metrics?
- How many pre-built reports are available and can these be customized?
- Is the system able to automate reporting requirements for each function?
- Are the reporting metrics accurate and trusted by each function?

How Rise Vision saved 50% time reconciling numbers with their monthly financials Bonus read

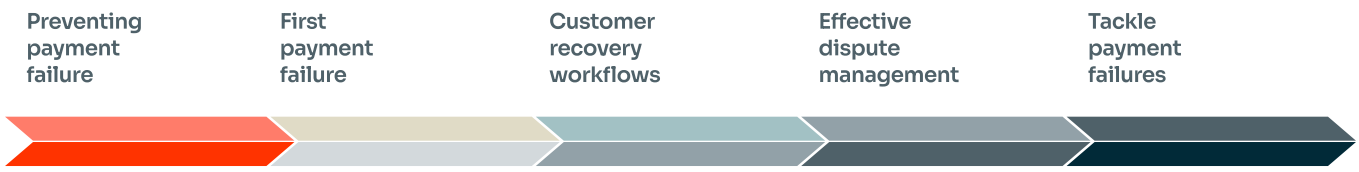
# Revenue recovery and collections

According to Bain and Co., a customer retention increase of 5% can increase a company's profitability by 75%. This is exactly why SaaS businesses need to ace customer retention to keep the revenue flowing. While many roadblocks in a renewal process can lead customers to churn, the most detrimental is a 'payment failure'. A failed payment literally forces a customer to leave your product/ service. All the subscription payment failure errors are grouped under two broad categories:

- **Soft declines** - When the customer's card issuing bank approves the payment but fails due to some operational glitches, it is termed a soft decline.
- **Hard declines** - When the customer's bank refuses to authorize the payment, due to fraud, expired credit card etc., it's defined as a hard decline.

Soft declines can be solved by simply retrying the same payment method at a later time. Alternatively, hard declines that happen on the customer's end, like insufficient funds, or expired cards, require active customer engagement asking them to update payment details or add funds for successful recovery. The revenue growth management system should be able to deploy strategies for recovering failed payments while creating a unified customer view for your AR team to make sure the right communication is sent proactively to a subscriber.

## Key facets for effective revenue recovery and collections




- Pre-dunning Emails
- In-app notifications
- Backup payment methods
- Auto-update expired cards

- Smart payment retries
- Identifying customer cohorts
- Dunning - Email engagement
- Measure dunning effectiveness

- Identify failure reason cohorts
- Auto engagement workflows
- Build custom collection journey
- Portal for customer actions

- Track ongoing disputes
- 360-degree AR visibility
- Automate collector queues
- Setup collection campaigns

- Real-time AR insights
- Evaluate recovery strategies
- Track customer interactions
- Collaborate across teams

## Key considerations

- Does the system provide easy access AR reports and metrics?
- How many pre-built reports are available and can these be customized?
- Is the system able to automate retries, dunning and customer communication?
- Does the system allow collaboration across functions for effective collections?

How Konica Minolta India increased credit controllers' coverage by 33% Bonus read

## Predictive & AI growth

Personalization isn't just a luxury—it's essential. Achieving true personalization at scale involves complex challenges, requiring advanced data analysis and significant resources. Businesses are using artificial intelligence (AI) to customize offerings and forecast customer behavior with never-before-seen accuracy. These customized offers, which can suggest better products or provide exclusive discounts, give users a feeling of importance and exclusivity and motivate them to act.

You can create hyper-personalized experiences that resonate with individual preferences by leveraging AI, which will ultimately lead to better success by increasing consumer satisfaction and loyalty.

An effective revenue growth management solution should be able to leverage advanced AI to personalize offers and streamline the offer creation process significantly. This bypasses the traditionally slow strategies that require extensive collaboration with copywriters and data analysts, along with significant time investments, enabling businesses to respond quickly and effectively to customer needs.

## Intelligent scaling for subscription businesses

**AI-generated personalization gives you a competitive edge by:**

- **Reducing manual effort:** Save valuable time and resources by automating the creation and deployment of retention offers, freeing your team to focus on strategic growth initiatives.
- **Enhancing customer satisfaction:** Deliver the right message to the right customer at the perfect moment, demonstrating your understanding of their needs with a personalized touch.
- **Improving retention rates:** Personalized offers mean higher acceptance rates and a direct impact on your bottom line.

## Key considerations

- Does the system seamlessly generate offers which can be deployed without dev efforts?
- How do we make the current tech stack more proactive to customer behavior?
- Is the marketing team able to deploy campaigns tailored to specific audiences?
- Does the company have a view on customer interaction with retention offers?

# Implementation and onboarding

Implementing an effective subscription and revenue growth management system can greatly bolster your business's efficiency and success. This process requires careful planning, smooth integration, and effective training to ensure a seamless transition and make the most of the new system.

01

## Implementation

The implementation phase is where the subscription and revenue growth management system becomes part of your existing tech stack. This includes configuring, customizing, and deploying the system to meet your organization's specific needs. It begins with a comprehensive assessment of business requirements, followed by system configuration, data migration, and integration with other relevant systems like CRM, payment gateways, and fulfillment systems. Collaborative communication between business stakeholders and the implementation team is vital to align system functionalities with your organization's strategic goals.

02

## Migration

Transitioning from one system to another, especially one handling the financial side of customer relationships, can be challenging. The migration process involves transforming data from the format of the current system to the new one. It's crucial to ensure nothing is overlooked during data migration, as any mistakes can directly impact the customer experience and harm your brand's image. Look for a partner who uses creative approaches to address data migration challenges. Automation is crucial, especially when dealing with a significant amount of data.

03

## Onboarding

To ensure everyone involved can use the new system effectively, it's important to provide key stakeholders with access to training sessions, documentation, and support. The onboarding process should be designed to accommodate users with different technical backgrounds, offering both basic and advanced training. Clear and straightforward documentation, user guides, and video tutorials help make for an effective onboarding experience. Ongoing support channels, like help desks or dedicated support personnel, are crucial for addressing user questions and challenges in the early stages of using the system.

04

## User feedback and support levels

Gather and analyze user feedback on the onboarding process of the solutions you're considering. Look into how the solution and its onboarding process identify areas for improvement and address any concerns quickly. It's crucial to understand how the onboarding team implements a feedback loop for continuous improvements, updates, and enhancements based on user experiences and changing business needs. Key criteria for an effective revenue management solution include support levels of 24/5 or 24/7, intensive support during implementation, and ongoing support during regular business hours.

# 05 Consolidating Findings

After the evaluation, it's time to gather all your findings in one place to speed up decision-making. To wrap up your evaluation of a revenue growth management system, you should have the following information ready:

| Evaluation Stages | Expected end result |
| --- | --- |
| 01 **Well-defined end goals** | • The list of p**ositive business outcomes** which would define the success criteria |
| 02 **Stakeholder alignment and requirements** | • Clear expected outcomes expected by stakeholders from each function<br>• Early buy-in from CxO's and the board to accelerate and prioritize the project |
| 03 **External references** | • **Advanced RFP Template** - Please contact us at marketing@chargebee.com<br>• Validation from external references - G2 review score |
| 04 **Critical feature scorecard** | • Scorecard for each solution against identified critical features.<br>• Please refer to the **'Evaluation scorecard'** and criteria under this section. |
| 05 **Implementation plan** | • Implementation and Migration plan along with key milestones - Please contact us at marketing@chargebee.com<br>• Go-Live timelines for change management |
| 06 **Onboarding plan and ongoing support** | • Onboarding trainings and artifacts<br>• Post implementation plan<br>• Custom engineering support |

# Evaluation Scorecard

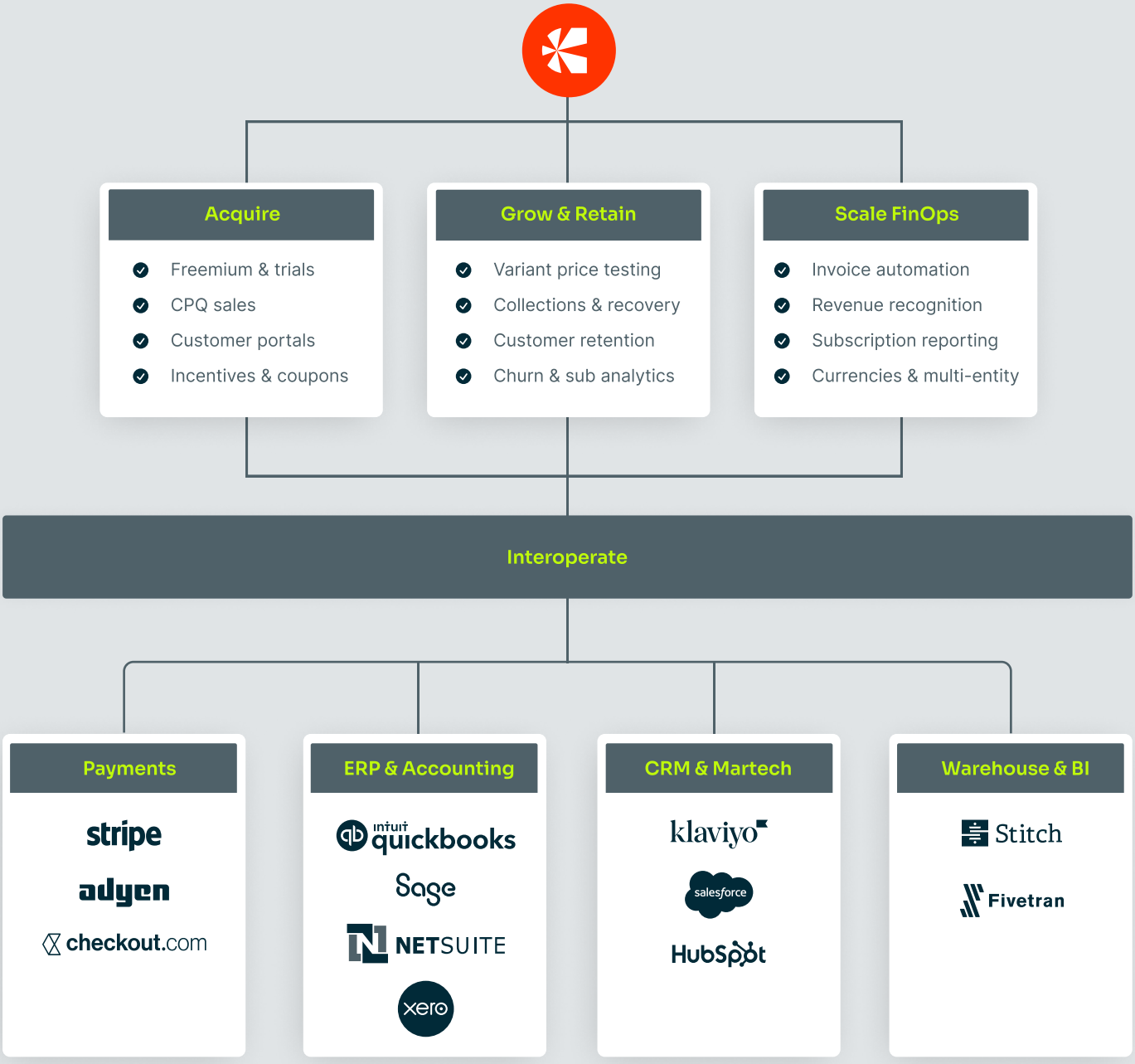
Depending on where you are in your transformation journey, it's crucial to choose a solution based on the right criteria. We've created a scorecard to help you qualify and shortlist the best revenue growth management solution. The solution should excel in the following areas and provide significant value to your business. Make sure to assign the appropriate value to each parameter after evaluating your business needs.

| Critical Capability | Heavy Weightage | Scoring Range | Value Delivered |
|---|---|---|---|
| **Subscription Management & Recurring Billing** | For all businesses in growth trajectory | Between 20 to 30 | ▪ Creating, managing & A/B testing in product catalog.<br>▪ Subscription lifecycle management<br>▪ Accurate billing & invoicing compliance |
| **Pricing and Revenue Optimization** | For businesses trying to find Product market fit | Between 10 to 25 | ▪ Explore packaging options (e.g. bundled or a-la-carte)<br>▪ Implement discounting strategies<br>▪ Experiment with pricing models |
| **Global Payments and Expansion** | For businesses trying to discover new markets | Between 10 to 25 | ▪ Accelerate time to value for new markets<br>▪ Global payment capabilities & localization<br>▪ Optimize transaction costs with multiple PGs |
| **Revenue Recognition and Compliance** | For businesses which are public or in Pre-IPO stage | Between 10 to 20 | ▪ ASC 606/ IFRS, regulations and global tax compliance<br>▪ Monitor revenue recognition risks.<br>▪ Automated Deferred revenue reports |
| **Churn Management & Retention** | Product Led Growth (PLG) | Between 10 to 20 | ▪ Mitigate & prevent both voluntary and involuntary churn<br>▪ Automated, personalized retention offers<br>▪ Rule based & automated payment retries |
| **Product Integrations and Marketplace** | For businesses with complex tech architectures | Between 10 to 20 | ▪ Interoperability via rapid data synchronization,<br>▪ Auditability, and extensibility including ERP, accounting tools, CRM, Marketing systems, and data warehouses. |
| **Analytics & Reporting** | For all businesses aspiring to become data driven | Between 10 to 15 | ▪ Ability to mine and surface insights.<br>▪ Strategies around GTM, customer behavior, product usage, and market trends from financial operations |
| **Revenue Recovery and Collections** | Sales Led Growth (SLG) | Between 5 to 10 | ▪ Automated revenue recovery from failed payments<br>▪ Custom built collections journeys & notifications<br>▪ Collectors queue - Unified view of customer activities |
| **Predictive & AI Growth** | Heavy PLG motion businesses > 20% of the revenue | Between 5 to 10 | ▪ Utilize subscription data to make predictions<br>▪ Present targeted incentives to at-risk customers.<br>▪ Generate contextual offers for retention |
| **Implementation and Onboarding** | For businesses with complex tech architectures | Between 5 to 20 | ▪ Faster time to value and ROI with new solutions<br>▪ Customized onboarding plan tailored to business needs<br>▪ Personalized support till Go-Live |
| **Overall score for the solution in evaluation** | | **100** | **Ideal solution should score greater than 75.** |

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# **Chargebee –** A Complete Subscription and Revenue Growth Management Platform

Chargebee is the leading Revenue Growth Management (RGM) platform for subscription businesses. Our mission is to help businesses of all sizes to grow their revenue by providing a comprehensive suite of solutions, including subscription management and recurring billing, pricing and payment optimization, revenue recognition, collections, and customer retention. Chargebee is trusted by businesses of all sizes, including Freshworks, Brevo, and Study.com, and is proud to have been consistently recognized by our customers as a Leader in Subscription Management on G2. To learn more about how Chargebee can help unlock and maximize revenue growth, visit www.chargebee.com.



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# Conclusion

In this guide, we've highlighted the importance of efficient revenue operations to ensure that each department—sales, finance, engineering, and product—can perform at their best.

By adopting a strong revenue growth management solution, organizations can speed up time-to-market, optimize revenue streams, and reduce customer loss. Additionally, they can implement flexible pricing models and ensure compliance with global tax, invoicing, and accounting standards.

By focusing on these key areas, you can smoothly transition to a subscription revenue model or improve your current revenue growth operations. The right subscription and revenue growth management solution will streamline operations, encourage innovation, and drive effective growth and success.

We hope this guide has provided you with useful insights and practical strategies for your procurement process. As you implement these solutions, remember that the journey to SaaS excellence is ongoing. Stay flexible, keep your customer at the heart of your strategy, and use integrated, data-driven revenue operations to achieve long-term success.

# The Chargebee Revenue Growth Management Platform

## Billing

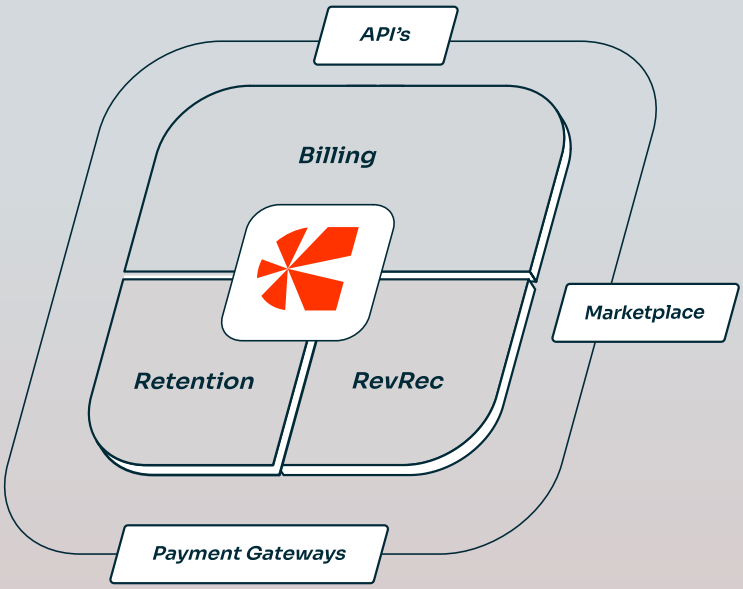
Manage subscriptions, billing, and invoicing at scale.

## RevRec

Unburden your finance team with automated, compliant revenue recognition.

## Retention

Reduce churn and grow lifetime value with an experience your customers can't resist.




## Enterprise-grade security, scalability, and compliance

AICPA SOC 2 · AICPA SOC · PCI-DSS Validated · GDPR · HIPAA Compliant

## Rated a Leader by customers, 5 years and running

Leader SPRING 2024 · Top 50 Commerce Products Best Software Awards 2024 · Momentum Leader SPRING 2024 · Fastest Implementation SPRING 2024 · Most Implementable SPRING 2024

*Not all items are applicable to all Chargebee products.*

**6,500+** Customers

**30+** Payment Gateways

**100+** Currencies Supported

**227** Markets Charged

## Unlock a lifetime of subscriber growth and retention with Chargebee.

Get a demo →

chargebee