Subscription & Billing Management Project – Problem Statement & Overview

Problem Statement

In today's subscription-driven economy, businesses face challenges in managing customer subscriptions, billing cycles, invoicing, and payments efficiently. Manual processes often result in errors, delays, and customer dissatisfaction. Finance teams struggle to track renewals, overdue payments, and revenue forecasts without an automated system. This project aims to design and implement a Salesforce-based Subscription & Billing Management solution that streamlines the subscription lifecycle, automates invoicing and payment tracking, and provides actionable insights through reporting and dashboards.

Project Goals

The goal of this project is to build a centralized Subscription & Billing Management system on Salesforce that will: - Automate subscription creation, renewal, and cancellation processes. - Generate invoices and track payments seamlessly. - Provide finance teams with real-time visibility into revenue and outstanding balances. - Improve customer experience with timely notifications and a self-service portal. - Ensure scalability for recurring billing models and integrations with external payment gateways.

Expected Outcomes

By implementing this solution, organizations will achieve: - Reduced manual effort and billing errors. - Faster payment collection and better cash flow visibility. - Improved compliance and audit readiness. - Enhanced customer satisfaction with accurate and transparent billing. - Actionable insights into subscription metrics, revenue trends, and churn rates.