## Merchant Name: Hockeystack Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills:   **Tech Stack:**   * QBO as ERP now. They are thinking of moving to Campfire in the next 3-6 months, but we have warned them that that would seriously affect their experience on Tabs. Partnerships team will maintain monthly conversations with Russ and GFT to postpone this move until we are integrated with Campfire. Implementation team should strive for the same.   **Manual Invoicing Process**   * + **Current System**: Previously handled by the HR person at Hockeystack, who used **Stripe** to manually send invoices by referencing **Salesforce**.   + **Manual Follow-Ups**: The team manually follows up with customers for payment without any automation.   + **Limitations**:      1. Stripe charges **0.5% of revenue per invoice**, which they want to avoid.     2. Invoices are sent **individually and manually**, with no automation or scheduling.     3. There is **no structured system** for tracking invoice status, late payments, or adding documents like W9s and bank info. * **Preferred Payment Method**:    + **ACH only**, no credit card payments currently being processed through Stripe   + May explore using **Ramp** for credit card acceptance in the future. * **Revenue Recognition and Reporting**:    + Currently **lacks visibility** into **deferred revenue** and **net dollar retention (NDR)**.   + The previous offshore accounting firm left things “all over the place.”   + **Manual journal entries** are used for revenue recognition.   1) What is the merchant temperament?  Russ is great, super friendly and very professional. Cares a lot about building out this new finance tech stack the right way  3) What are the Tabs features that the key POC cares about?  Loved that Tabs:   * Ingests contracts automatically from Salesforce * Builds invoice schedules instantly * Sends invoices on a set date * Automates follow-ups (dunning) * Reconciles ACH payments via Plaid * Syncs invoice and payment data to QuickBooks   Also:  Strongly appreciated the auto-generated **deferred revenue schedule** and **export to QuickBooks**.  Was excited by the visibility into **monthly rev rec by customer**, which he sees as key for journal entries and compliance.  **Also cares about:**  **Automation and Efficiency**   * He wants to eliminate manual processes for invoicing and collections. * Automating invoice **generation**, **sending**, **reminders**, and **payment tracking** is a top priority. * Reducing the **headcount burden** on revenue accountants through tools like Tabs is a key goal.   **Net Dollar Retention (NDR) as a North Star Metric**   * Russel explicitly states:  *“ARR growth is easy for us. It's NDR growth that's like north star metric for Hockeystack for this year.”* * He wants the ability to **customize cohorts**, **slice data**, and **track NDR over time**. * Tabs' integration with Omni for advanced reporting and slicing data is seen as “icing on the cake.”   **Reliability and Maturity of the Tool**   * He's been **burned by buggy early-stage tools** before. * Cares deeply about not being a “beta tester” and wants confidence that Tabs is stable and reliable. * Expressed the importance of **strong support** and is reassured by:    + Dedicated implementation specialist   + Premier support with CTO, Head of Product, and CSM   + Slack channel integration for support   **Clear ROI**   * Sees clear ROI in reducing Days Sales Outstanding (DSO), which improves cash flow and reduces manual labor. |
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### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

1. Steps to process
   1. Just add the amount the customer needs to pay: don't need to add the original amount with the discount applied on top
      1. Example: It should just say 27,600 for Al21 Labs:
   2. There are some old contract that will be uploaded that won't have the effective date explicitly listed. In those cases, the contract start date will be the later date of the two signatures on the contract. (Future/Newer contracts will explicitly say)
      1. Example: Alvys
   3. Make sure to include billing address and email
2. Anything to ignore in contracts?
3. Specifics processing things the merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
4. Default Service Term
   1. If None Listed, Ops Default is 1 Year
5. Default Net Payment Terms
   1. If None, Ops Default is 0
6. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
7. How do we handle taxes as a line item?
   1. If None Listed, Ops Default is every tax line item becomes a BT

### Events Processing (if necessary) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* What are the instructions for assigning integration items?
* Example: All Statsig integrations items should be labeled as “Sales”
* Example: All “Pinata” integration items should be labeled as “Software Subscription Bundle” unless otherwise noted by Merchant

Post Processing Communications (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* Does the Ops Team need to notify anyone on the team re: completion of processing batches in Implementation or Active phase?
* Who needs to be notified and when?
  + Example:
    - Who: Customer Success [Azmat Aziz] needs to be notified
    - Where: Messari internal merchant channel
    - When: contracts are processed [Merchant Phase: Active]

### Customer Information *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests *(AE to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* June 18th: https://us-56595.app.gong.io/call?id=4638832939723317358
* May 29th: https://us-56595.app.gong.io/call?id=153932604884814192