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

### 

### 

| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   SaaS billing today, sometimes multiple skus with product addons  Will be launching a usage model in the not too distant future  1) What is the merchant temperament?  Canadian and fantastic to work with. Smart, engaged and super excited about Tabs  3) What are the Tabs features that the key POC cares about?   * Contract processing, * rev rec automation and visibility into ARR, * Hubspot Integration * Collaboration features are going to be a big driver for them   Their Challenges are:  Milk Moovement has challenges with revenue recognition processes, potentially leading to inaccurate financial reporting and lack of confidence in the revenue numbers needed to present to the leadership team.  Milk Moovement needs better SaaS reporting and a central repository for financial data, as the current system (QuickBooks) is invoice-based and requires manual intervention.  The Milk Moovement team is looking to address challenges with the company's billing (huge DSO), revenue recognition, and the handoff and collaboration between sales, onboarding, and finance.  Kenny from Milk Moovement's sales team is interested in integrating Tabs with their CRM system (Hubspot) to automate the tracking of sales opportunities, contracts, billing, and renewals.  They also want to ensure a smooth implementation and onboarding process, as they had a challenging experience with another system provider recently (Rippling was self-service) |
| --- |

### 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. Service Start Date: Locate the "Effective Date" or "Order Effective Date" specified in the agreement.
   2. Months of Service: Identify the initial subscription or service term stated in the contract.
      1. For implementation fees: should be equal to the months in the service term (not 1 or 0)
   3. Item Name: Find the name of the service or product being provided under the agreement.
   4. Item Description: Leave blank.
   5. Integration Item: use item in bold - products that fall into that category are listed below each integration item
      1. **Software subscription**
         1. DEFAULT (i.e. if not clearly in one of the other categories):
         2. Subscription Fee
         3. Annual Fee
         4. Annual Saas Subscription Fee
         5. Software
      2. **Feed Supply System**
         1. Feed Order
         2. Feed Shop V1 Delivery
      3. **Professional Services - Implementation**
         1. Project Management
         2. Set-Up Fee
         3. Implementation Fee
         4. Professional Services - Implementation
      4. **Professional Services - Custom Development**
         1. System Development
      5. **Optimization - Schedule Autopilot**
         1. Schedule Autopilot usage fee

If the product is not found in the above, check this spreadsheet (column D): <https://docs.google.com/spreadsheets/d/1StetHyP2ksrExFSGMQulwAghLhCk8v6rjIbJV9lnADY/edit?gid=245011289#gid=245011289>

* 1. Revenue category: based on *integration item*. Use the bolded revenue category. For example, “software subscription” integration items should be “recurring item” revenue category.
     1. **Recurring items**
        1. Software Subscription
        2. Software Add-Ons
        3. Feed Supply System
     2. **Non-recurring items**
        1. Optimization - Schedule Autopilot
        2. Professional Services - Custom Development
        3. Professional Services - Implementation
  2. Billing Type: Determine whether the billing follows a flat fee or usage-based billing.
  3. Total Price: Identify the total service cost, including any additional fees or payment breakdowns specified in the agreement.
  4. Quantity: Check for any references to the number of licenses, user seats, or units included in the contract.
  5. Start Date: Confirm the official service commencement date as outlined in the document.
  6. Periods: Verify whether the contract is a one-time agreement or includes a period of terms.
  7. Frequency: Identify the invoicing schedule (e.g., annual, monthly, or milestone-based) as specified in the payment terms.
     1. Set to None for implementation products

1. Anything to ignore in contracts?
2. 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)
3. Default Service Term
   1. If None Listed, Ops Default is 1 Year
4. Default Net Payment Terms
   1. If None, Ops Default is 0
5. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
6. 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)*

* Intro call - <https://us-56595.app.gong.io/call?id=4185988078385843569>
* Custom demo 1 - <https://us-56595.app.gong.io/call?id=5935291797171431468>
* ROI conversations + Implementation and CS discussion - <https://us-56595.app.gong.io/call?id=3191320388591254286>
* Custom demo 2 (covered more complex contracts and a sample of their upcoming usage model - <https://us-56595.app.gong.io/call?id=1784481181393612583>
* Demo/meeting with Sales and other Finance leader - <https://us-56595.app.gong.io/call?id=7173081124739289102>
* Negotiation - <https://us-56595.app.gong.io/call?id=2796248305242222416>