## Merchant Name: GC AI 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   GC AI invoices customers primarily through **Stripe**.   * ~20% of revenue is still self-serve/PLG credit card payments. * ~80% is now enterprise/SLG contracts, billed via Stripe invoices. * Many enterprise customers pay by **bank transfer/wire** (through SVB), and some still use ACH or card. * Payment terms are increasingly nuanced (quarterly, split-year, custom schedules like “4 months now, 8 months in January”), which Stripe struggles to handle.   They have a Seat Based Model today, and have said they are moving to usage by EOY. See Tabs as a partner for usage scoping  1) What is the merchant temperament?   * **Fast-paced & growth-driven**: GC AI is growing ~23–25% MoM, so they prioritize speed over perfect process. * **Scrappy but pragmatic**: Today they rely heavily on spreadsheets, manual reconciliation, and edited PDFs to make billing “work.” * **Cautious but curious**: Jen worries about “no source of truth” and is thoughtful about risk of system debt, while Devin focuses on getting accurate ARR and investor metrics. * Overall, they’re **eager for automation** but want confidence that Tabs won’t add complexity.   3) What are the Tabs features that the key POC cares about?  **Single source of truth for ARR & revenue** (most urgent priority).  **Automated contract-driven invoicing** (handling discounts, proration, expansions, and custom terms).  **Stripe + Tabs hybrid model** (keep PLG in Stripe but unify reporting in Tabs).  **Collections & cash application** (Plaid matching, visibility, forecasting).  **Renewal tracking** (eliminate manual spreadsheets).  **Future-proofing for usage-based billing** (API/metering integration).  Solutions alignment doc: [GC AI | Solutions Alignment and Scope for Revenue Automation](https://docs.google.com/document/d/1bHcrb906sQXOhUuKymYa3WkUQbJkHtEQm50NRf0N6g8/edit?tab=t.0) |
| --- |

### 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
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)*

* Seat Based Billing Automation
  + Pricebook to directly add seats in Tabs
  + This is their billing model today and will provide the most automation for their team
  + ***Medium - they know they are a D&D partner for Seat Based Billing***

### 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)*

* Disco (8/12)
  + <https://us-56595.app.gong.io/call?id=2965691812418234921>
* Demo (8/15)
  + <https://us-56595.app.gong.io/call?id=4486563955196799465>
* Workflow Alignment, Implementation, Pricing (8/22)
  + <https://us-56595.app.gong.io/call?id=2133606383223160874>
* Reference Call with Serg (9/12)
  + <https://us-56595.app.gong.io/call?id=2061480128710900883>