Merchant: Brevity

Demo date: Mar 14, 2025  
Scoping start date: N/A

MSA Signature Date: Mar 19, 2025  
Onboarding Kick Off Date: March 23, 2025

[If Exists] Opt Out Date: No opt out  
Go Live Date: ASAP

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

Key people at Merchant

* Accountant: N/A
* CFO: Jeff Fischer
* Customer service rep who is really involved: Brad Janicki
* Account Receivable POC: Jeff Fischer + Brad Janicki
* Billing POC: Jeff Fischer

| Notes Sections [Ops International Team to Ignore] *(AE/ Implementation to fill)*   * Info on how merchant bills   + Brevity's business model involves offering a platform with subscription-based services. The subscriptions are primarily per seat, with some contracts being trial-based and others on annual or multi-year terms. They also have a consumption-driven model, but it's not fully operationalized yet, involving the tracking of minutes used in the platform. * Is there any important merchant relationship information?  1) What is the merchant's temperament?   + Both straightforward and kind.   2) Is there a key POC: (i.e.: who is the buyer/decision maker?)   * Jeff is the Champion, Kelvin (CEO) is the EB, and Brad is the coach     3) What are the Tabs features that the key POC cares about?   * Simplify Pricing Complexity: Accommodate flexible pricing models and unique contract terms. * Streamline Revenue Processes: Integrate revenue tracking and forecasting into a single platform, reducing manual errors and improving data accuracy. * Jeff is going to care about Revenue & ARR * Brad is going to care about the process - contracts & billing |
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Company summary  
*(AE to fill)*

Summary of what company does:

* Brevity is a company that offers AI-powered sales training solutions. It provides a platform for sales teams to sharpen their skills through realistic AI-driven role-plays, helping them improve performance and close more deals. The platform allows for automated feedback and scoring on sales conversations, enabling reps to measure and improve their skills without manager intervention. Brevity's tools are designed to help teams tackle challenging scenarios with confidence and consistently exceed their quotas.

Goals (North star)  
*(AE/ Implementation to fill)*

What is the merchant's goal? What pain are we solving? Why are they buying Tabs?

* Manual Processes: Brevity's current billing and invoicing processes are highly manual, leading to potential errors and inefficiencies when they scale.
* Lack of Integration: Systems like Stripe, QuickBooks, and HubSpot are not well-integrated, causing data inconsistencies and making it difficult to track key metrics like MRR and ARR (they know that MRR & Hubspot direct integration is on the roadmap)
* Scalability Concerns: As Brevity grows, the manual nature of their processes becomes increasingly unsustainable
* Why Tabs: Simplify Pricing Complexity (accommodate flexible pricing models and unique contract terms)
* Why Tabs: Streamline Revenue Processes (integrate revenue tracking and forecasting into a single platform, reducing manual errors and improving data accuracy)

Is there an opt out clause? If so, what is the merchant looking for so they do not exercise it?

* No op out clause.

Billing model  
*(AE/ Implementation to fill)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
  + The current model is based on a per-seat subscription, with some customers on trial contracts for 2-6 months, and the goal is to transition them to annual or multi-year contracts as the company scales.
  + They get contracts in from sales → Brad converts that contract into a subscription in Stripe → connect it to their customer on the back end of their platform → Send that invoice out to customer → customer pays → activates the subscription on the back end → Subscription goes live
  + Averaging 5 contracts a month currently, will be increasing to 25 - 30 by the EOY
* How contract is broken up
* One off things to know about the merchant

Contract Processing Steps  
*(Implementation/Success to fill)*

1. Steps to process
   1. Start Date: Identify the "Effective Date" and then enter the 1st of the following month unless the effective date is on the first of the month.
   2. Contract Dates
      1. All contracts will have a subscription period (independent of the signing date); Use that for service and revenue start and end
   3. Months of Service: Locate the "Subscription Duration"
   4. Item Name: Find the product or service being provided under the Product column
   5. Item Description: Leave blank
   6. Integration Item: Leave blank
   7. Revenue Category:
      1. Seat Fee → Annual Subscription [If the contract is for more than 11 months]
      2. Seat Fee → Pilot Subscription [If the contract is for less than 11 months]
      3. Implementation/services fee → Service
   8. Billing Type: Flat or usage.
   9. Total Price: Identify the "Total Cost" for flat pricing and “Unit Cost” for usage
      1. $0 BTs to be added as well
      2. If implementation fee waived, it should still be shown with a 100% discount
   10. Quantity: Under the Quantity column
   11. Periods: Locate the "Subscription Duration"
       1. Include the renewal period (only if the contract mentions auto renewal)
          1. For example, if initial term is 1 year and the renewal term is 1 additional year, then process both years
   12. Invoicing Cadence
       1. Usually entirely upfront billing (ie: one invoice for the entire contract)
   13. Net Terms
       1. Net payment terms are dictated by the contract (some net 0, net 30 or net 15) each contract will vary
   14. SKU Processing
       1. Brevity has two SKUs that appear on the contracts, Seats and Implementation Fee
          1. Implementation Fee should
             1. Have Revenue Recognition all on the same day the contract starts
             2. Have Revenue Category of Service
             3. Have QBO Item of Implementation Fees
          2. Seats should
             1. Have Revenue Recognition matching the contract subscription period
             2. Have Revenue Category of Annual Subscription or Pilot Subscription

If the contract is for more than 11 months (ie: annual contract)

* + - * 1. Have QBO Item of Seats

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)  
*(Implementation/Success to fill)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Implementation/Success to fill)*

* 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)  
*(Implementation/Success to fill)*

* 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  
*(Implementation/Success to fill)*

* 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/Implementation/Success to fill)*

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

Rewatch Calls  
*(AE/Implementation/Success to fill)*

* Rewatch by dates
  + [Discovery Call](https://us-56595.app.gong.io/call?id=7261547079522842737&account-id=2082262972666476959)
  + [Demo Call](https://us-56595.app.gong.io/call?id=7195565063834588228&account-id=2082262972666476959)