Merchant: Digitalzone

Demo date: May 20, 2025  
Scoping start date: June 4, 2025

MSA Signature Date: August 27, 2025  
Onboarding Kick Off Date: TBD

[If Exists] Opt Out Date: N/A  
Go Live Date: Mid-October

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

**Key people at Merchant**

* Dan Morgan — Chief Financial Officer (primary contact).
* Rishikkes - CEO (Economic Buyer)
* Sudhir Ghenand - AR
* Finance/AR team in India (2 - 3 people). The entire AR team is based there; Dan coordinates with them 5–9 AM PT.

**Info on how merchant bills?**

* Billing is tied directly to contract terms. Once an IO (Insertion Order) is signed, the trigger to invoice depends on go-live dates and delivery milestones. Sometimes the go-live happens within a week, other times up to 30 days, and invoices are only sent after delivery confirmation
  + We have committed to those triggers task or email-based, salesforce updates, or down the line… custom integration from system events
* For milestone or usage-based agreements, invoices are generated when a threshold of delivered units (e.g., leads or impressions) is met. This will be automated through Tabs either by usage uploads (CSV/API) or by sending completion dates that trigger invoice creation.
  + Usage data is kept in Excel
* Contracts often specify whether billing is upfront, as-delivered, or monthly cadence. If not explicit, account teams log the preferred cadence in Salesforce, which then dictates the invoice schedule
* Payment methods: Majority ACH; some checks.
* Volume: 100–200 invoices per month

**TechStack?**

* PandaDoc, SFDC, QBO (go live with Sage early 2026)
* Does not use a payment processor or tax solution

**Is there any important merchant relationship information?**

* They are currently on QBO. Tabs will sync directly with QBO.
* Dan was coming into finalizing pricing with Sage with next steps being signature around 08/18. Sage said implementation will take 3 months (Nov 2026). Dan thinks it will take 4 - 5 months (Jan 2026).
* Once they are fully up and running with Sage, Tabs will then sync directly there.
* Kat to handle upsell when they move to Sage officially

**What is the merchant temperament?**

* Dan consistently asks very practical, scenario-based questions. He is skeptical but open-minded, direct and candid and a “hands-on” CFO.

**Is there a key POC: (i.e.: who is the buyer/decision maker?)**

* Champion: Dan (CFO)
* Economic Buyer: Rishi (CEO)

**What are the Tabs features that the key POC cares about?**

* Overall: Automated & AI focused invoicing & easy implementation
* Streamlined Billing, AR, and RevRec for Sage Integration: Automates finance operations and scales globally by reducing manual workflows and supporting the transition from QBO to Sage.
* Support for Complex Contracts, Flexible Billing, Project-Based Models: Handles flexible billing (usage, milestones, recurring) by extracting data from unstructured sources like PandaDoc and SFDC.
* AI-Driven Ingestion Enhanced with Hands-On Support: AI parses contracts; a dedicated NY-based team collaborates with Digitalzone AR/ops to refine logic, handle edge cases, and ensure accuracy.
* Audit-Ready Revenue Intelligence: Delivers ASC 606 reporting, category-level insights, and clear visibility from bookings to rev rec for internal and audit needs.

**Summary of what company does:**

* Digitalzone is a B2B demand generation company that specializes in creating high-converting demand for modern businesses. Rather than relying on external partner networks, they’ve built everything in-house - this includes their own data, platforms, and campaign operations.
* They use that data to run multi-channel campaigns (ads, email, content) that target people, not just companies.
* They track how those buyers actually behave (what they click, read, and engage with) and use AI to figure out who is most likely to buy.
* Main service: Their big offering is called Programmatic Nurture™, which is about nurturing individual contacts through the buying journey, instead of just doing broad account-based marketing.
* Extra services: They also handle lead generation, digital ads, and content campaigns, all in-house.

**What is the merchant's goal?**

* Automating Manual AR Work
  + Right now, Digitalzone’s AR is heavily manual - “literally keying stuff in” to QuickBooks
  + The goal with Tabs is to automate invoicing, data capture, and AR workflows, cutting down on errors, delays, and high labor costs
* Improving Cash Forecasting & Visibility
  + Dan’s biggest concern was predictability of cash flow. He wants Tabs to model actual customer payment behavior (30/40/50+ day payers) instead of just relying on contract terms
* ERP (Sage) Readiness
* Revenue Recognition & Audit Compliance
  + Dan wanted Tabs to handle ASC 606 rev rec schedules, deferred revenue, and make audit prep much easier

**What pain are we solving?**

* Manual AR Processes
  + Today, Digitalzone’s AR is manual and inefficient - invoices are keyed into QuickBooks by hand, collections are tracked in spreadsheets, and reconciliations are done manually
  + This creates delays, errors, and high labor costs, making it hard to scale.
* Poor Cash Flow Predictability
  + They are manually basing cash forecasting on “when” the customer is going to likely pay with payment behavior being very varied (30, 40, 50+ days)
* Complex Customer Relationships
  + Customers like Microsoft come through hybrid models (sometimes direct, sometimes via agencies), creating messy customer master hierarchies
* Compliance & Audit Inefficiency
  + Dan’s team is exposed to audit risks because revenue recognition and contract tracking are manual and inconsistent
  + Credit memos, renewals, and uplifts are also managed in siloed systems.

**Why are they buying Tabs?**

* Replace Manual AR with Automation
* Reliable Cash Forecasting
* Prepare for ERP migration to Sage
* Compliance and Audit Readiness
* Enable Growth (goals being 20% - 30% into 2026)

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

* No

Billing model  
*(AE/ Implementation to fill)*

**Are there unique things about the customer creation process for this merchant?**

* Agency vs. Direct Customers: Some Digitalzone customers come through agencies, but the end customer is a large enterprise (e.g., Microsoft).
* Renewals, Amendments, & Edge Cases: Customers often come back with amendments or renewals, sometimes through agencies, sometimes direct. Dan stressed that these edge cases need careful handling so that customer records don’t get duplicated or broken.

**How is the contract broken up?**

* Insertion Orders (IOs) as the Core Contract
  + The primary contract vehicle is an IO (Insertion Order).
  + Once an IO is signed, it triggers the setup of billing terms and customer records.
* IOs may specify:
  + Upfront billing (entire contract value billed at once), or
  + As-delivered billing (invoices tied to milestones or actual delivery).
  + Importantly, Dan emphasized that Tabs must respect go-live triggers and delivery triggers
* Product/Service-Level Breakouts
  + Within each contract, there can be different revenue components, such as: platform fees, Service plan fees, usage-based charges (e.g., lead counts, impressions).

**One off things to know about the merchant?**

* N/A

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

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)  
(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?

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: Sage Integration
  + Urgency: Nov - Jan

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

Rewatch by dates

[Disco](https://us-56595.app.gong.io/call?id=2620460786104954645)

[Standard Demo](https://us-56595.app.gong.io/call?id=537735172212775207)

[Custom Demo](https://us-56595.app.gong.io/call?id=4397172520651301326)

[Meeting w. Ali](https://us-56595.app.gong.io/call?id=8176949437478451983)

[Meeting w. Molly](https://us-56595.app.gong.io/call?id=789734774589048728)

[Pricing](https://us-56595.app.gong.io/call?id=2717802609307272927)

[ROI & Pricing w/ Ali](https://us-56595.app.gong.io/call?id=6044809504319877852)

[Partnership Alignment](https://us-56595.app.gong.io/call?id=6968514346916346323)