## Merchant

Scoping start date: 2023

Implementation Completed Date (Go live date): 2023

MSA Signature Date: January 2024

GTM POC: Rebecca

ERP: QBO

Tax Integration: n/a

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### Key people at Merchant

### Adam Vojdany - CFO, advisor to Tabs

* Kate Snow, accountant
* Jimmy Mickle, biz ops
* Ben Walker, rev ops

### Company summary

Simon Data provides a customer data platform (CDP) that enables businesses to consolidate, analyze, and activate their customer data across various channels. By leveraging advanced analytics and machine learning capabilities, Simon Data helps companies create personalized marketing campaigns and optimize customer experiences in real-time. Their platform empowers businesses to drive customer engagement, retention, and revenue growth through data-driven strategies.  
  
AM Notes

Adam is an advisor and friend to Tabs. The team is more skeptical and needs winning over. Our objective is to do that by the time their Chargebee renewal expires in August for a full migration.

Adam’s excitement about the Tabs vision is rooted in contracts + the reporting output from them - sees the actual billing flow as relatively commoditized, and just a workflow that sits on top of the real value driver in contract AI.

### Billing model

* Recurring subscription fees (Simon Data Platform)
* Monthly overages for 3 categories: email volume, contact volume, and account management hours (all 3 are charged overages beyond thresholds defined in the contracts)

### Contract Processing Steps

See Arjun loom videos which have been provided to BPO

Fairly complex contract processing

We are also providing output in a spreadsheet format to help them with revenue reporting by product line (work-in-progress as of 4/1/24) - ideally we will continue to support this for them but need to learn more about whether we are adding substantial value on this.

### Events Processing (if necessary)

* Simon is supposed to share an EOM report with events for the overage billing
* They take a long time to get this data together in order to provide it to us (the biz ops team is working on the BI internally to improve this)
* Expect that Tabs collaboration tools will help a lot (one of the biggest slowdowns is waiting for their CS team to get time sheets in order to calculate AM hours per client)
* They often waive overages and don’t send bills, so need a way of capturing this as well (at Simon it is currently done ad hoc)

### Customer Information

* We have not started any real invoicing, so there is still a lot to uncover about specific end customers and their requirements

### Feature Requests

* Collaboration - slack with CS team on overages
* Events - self serve will be a big feature to roll out w/ them
* Invoice tracking - activity log, tracking individual emails
* Sending invoices from Simon Data email address
* Small number of international invoices to handle

### Rewatch Calls

* Rewatch by dates