Merchant: Welcome Home Software

Demo date: May 9, 2025  
Scoping start date: May 9, 2025

MSA Signature Date: TBD  
Onboarding Kick Off Date: TBD

[If Exists] Opt Out Date: N/A  
Go Live Date: TBD

GTM POC: Kat  
Implementation POC: Royce

ERP: QBO

Tax Integration: No Tax

Key people at Merchant

Mathew Oberele - VP of Finance and Operations (Champion)

Josh Ringer - Controller (Coach), newly hired

Hanna Oliveto - Senior Finance & Operations Manager (Coach), newly promoted

Notes Sections

*(AE/ Implementation to fill)*

Info on how merchant bills

WelcomeHome bills customers monthly via QuickBooks, relying on recurring transactions. Each deal marked as “Closed Won” in HubSpot triggers a Slack notification, followed by a manual email outreach from the billing team to clarify how the customer prefers to be billed (e.g., consolidated vs. separate invoices) and who the billing contact is. Many payments come late—4–5 months on average—and invoice methods vary greatly (ACH, check, credit card). They export QuickBooks data into Google Sheets for AR tracking

Is there any important merchant relationship information?

* WelcomeHome is entirely bootstrapped, founder-owned, and has grown to $20M ARR.
* They are expanding into the home care vertical from their core senior living CRM business.
* Their finance function is modernizing with the recent hire of a controller (Josh), but they still rely heavily on QuickBooks, HubSpot, and manual processes.
* There’s a deep preference to stay lean and not over-invest in headcount or unnecessary tooling

What is the merchant temperament?

* Pragmatic and lean-minded.
* The leadership avoids over-engineering and values simplicity and flexibility.
* They're thoughtful about growth but risk-averse due to being bootstrapped

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

* **Ryan W -** CTO, did not meet through process, economic buyer
* **Mathew Oberle** – VP of Finance & Operations, owns billing, AR, finance tech stack.
* **Josh Ringler** – newly hired Controller, pushing toward audit readiness and system improvements.
* **Hanna Oliveto** – ops Manager, key on integrations and data flow.

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

* Automated invoice creation from contracts.
* Support for parent-child billing hierarchies.
* Order-to-cash automation (including dunning and collections).
* Cash application and reconciliation with Bank of America via Plaid.
* Integration with HubSpot, PandaDoc, QuickBooks.
* Ability to ingest changes via email (Tabs Ingest).
* Custom fields and ARR tracking by operator ID.
* Integrations with their own CRM to auto-sync community/operator data.

Company summary  
*(AE to fill)*

Summary of what company does:

WelcomeHome Software is a CRM tailored to the senior living industry. It helps operators manage sales, lead tracking, and communication. It’s now expanding into home care CRM solutions

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

What is the merchant's goal?

* Scale to ~$27M ARR in 2025, ~$40M by 2027.
* Build scalable, audit-ready finance infrastructure.
* Reduce manual work and headcount requirements.
* Improve billing accuracy and cash flow timing.
* Prevent revenue leakage from churned or transferred accounts

What pain are we solving?

* Manual and error-prone billing and collections.
* Missed invoices and revenue leakage due to poor tracking of operator transitions.
* Delayed collections due to misrouted invoices and unclear contacts.
* No support for contract ingestion or automated invoice generation.
* Inflexible tooling (QuickBooks limitations, lack of live data integrations)

Why are they buying Tabs?

* Tabs can automate their entire billing and order-to-cash process.
* Reduces reliance on manual work and spreadsheets.
* Aligns with their bootstrapped strategy by being cost-efficient and scalable.
* Enables better reporting, audit readiness, and potential Netsuite migration prep.
* Custom invoice fields, parent-child billing, and ingestion flexibility are major selling points

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?

* Sales often skips listing specific communities; contracts just say "all communities."
* No new contracts for expansions/churns—these are tracked manually via CSM emails.
* Billing preferences (who pays, how to pay, bill format) can be clarified via email after signature.

How contract is broken up

* Contracts may include a flat monthly fee ($500 per location), a waived or conditional implementation fee, and a pilot/free period.

One off things to know about the merchant

* Strong aversion to late fees or heavy-handed collections.
* Implementation fees are used more as sales leverage than actual charges.
* Some operators switch billing preferences mid-stream (from child to parent or vice versa).
* Their internal CRM has the most accurate list of communities by operator;API integration with Tabs.

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: Statement roll-up functionality per operator.
* Why it's important: Avoiding sending a million invoices to one operator
* Urgency: Said it would come around June/July

FR 2

* Credit memo creation and syncing back to QuickBooks
* Why it’s important: Sometimes they need to credit back
* Urgency: Low, can currently be done in Quickbooks

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

Rewatch by dates

* [Disco: April 23rd](https://us-56595.app.gong.io/account?id=7306143194496304768&type=ACCOUNT&workspace-id=2531298410931371606&date=2025-04-23&activity-id=1432577819181918845&filter=%7B%22accountFilter%22%3A%7B%22type%22%3A%22And%22%2C%22filters%22%3A%5B%7B%22type%22%3A%22ActivityType%22%2C%22values%22%3A%5B%22CALL%22%5D%7D%5D%7D%7D)
* [Demo: May 9th](https://us-56595.app.gong.io/call?id=927007584724836455&account-id=7306143194496304768)
* [Demo: May 14th](https://us-56595.app.gong.io/call?id=7624215826254002915&account-id=7306143194496304768)
* [Meeting with Ali: May 22nd](https://us-56595.app.gong.io/call?id=7935808679977842175&account-id=7306143194496304768)
* [Technical workflow of data: May 29th](https://us-56595.app.gong.io/call?id=6031148733329731038&account-id=7306143194496304768)
* [Last accounting questions](https://us-56595.app.gong.io/call?id=1240886126739848523&account-id=7306143194496304768): May 30th