## Merchant Name: Together AI Implementation POC: Royce *(IM to fill)* CX POC: *[IMP to Add]*

### Key people at Merchant

### Hanson Hermsmeier: VP, Corporate Finance

* John Lee: Director of FinOps and Accounting
* Tim Yen: Accounting & Financial Operations Lead at Together AI

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills   **Sales-Led (SLG / Forge & Dedicated):**  Contracts typically include pre-committed GPU quantities (e.g., H100s) with **staggered delivery schedules**. Customers are invoiced according to preset **order form billing schedules** (e.g., 15% upfront, balance over monthly/quarterly installments).   * **Challenge:** Actual deliveries often differ from contracted quantities or dates → Together issues **credits to invoices** when partial deliveries occur. * **Revenue Recognition:** Needs to track **daily delivery-based revenue**, not just order form assumptions.   **Product-Led (PLG / Serverless):**  Usage-based, tracked in Metronome/Stripe. Revenue recognition follows burn-down of actual usage.  **Reality Today:**  Delivery confirmations live with **TAMs in Slack** → John & Tim manually reconcile into Salesforce/QuickBooks. This creates risk of missed dates and mismatches between invoicing and actual delivery.  **Future State with Tabs:**  Contract-driven invoicing continues, while delivery data (eventually via Salesforce, interim via custom entry tool) drives credits and daily rev rec.  1) What is the merchant temperament?  **Collaborative but exacting:** They see Tabs as a **partner**, not just a vendor, and expect us to help shape their future-state workflows. They’re open to our guidance but want clarity and confidence in execution.  **Detail-oriented & risk-aware:** John and Tim press into **operational details** (edge cases, credits, partial deliveries) and want to ensure short-term workflows are efficient, not just future-proof. They’ll push for specifics.  **Busy & bandwidth-constrained:** Team is under heavy load (NetSuite go-live, audit prep, scaling pains). They appreciate when we respect time, frame work clearly, and remove ambiguity.  **Forward-looking:** Hanson, John, and Tim buy into Tabs’ **long-term vision** and are motivated by confidence that we can scale with them. They respond well when we show we’ve thought through edge cases and bring best practices from peers.  3) What are the Tabs features that the key POC cares about?  1. Partial Deliveries & Flexibility   * Ability to record **partial GPU deliveries** (quantities + dates) when customers don’t get everything upfront. * Critical that Tabs can handle piecemeal delivery without requiring complex CSV uploads every time. * They want flexibility to make **manual adjustments** if TAMs miss a Slack/Salesforce update.   2. Daily Revenue Recognition   * Revenue must be recognized **daily**, not monthly, to match GPU delivery schedules. * They want confidence that Tabs can automate daily rev rec based on deliveries while maintaining clean audit trails.   3. Credits Applied to Invoices   * Invoicing follows preset schedules from order forms, but if deliveries lag, Together needs **credits automatically reflected on invoices**. * Transparency on credits is essential for collections - their customers push back if invoices don’t match perceived delivery.   4. TAM → Slack → Salesforce Workflow Bridging   * Current source of truth for deliveries is **TAM updates in Slack** → manually logged by Finance. * They know long-term this should flow into Salesforce, but in the short-term, Tabs needs to **bridge the messy workflow** (e.g., lightweight delivery-entry tool feeding Tabs).   5. Contract Ingestion & Order Form Handling   * They expect Tabs to parse Salesforce contracts and **auto-generate billing schedules** aligned to order forms. * Must handle **multiple order forms & amendments**, with products and billing separated but rolled up as needed.   6. Audit-Ready Reporting & Controls   * Auditors (KPMG) require **clear linkages** from contract → invoice → revenue schedule → credits. * Tabs needs to provide **deferred revenue balances** and allow drill-down by product/order form for audit confidence. |
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### 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)*

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

### 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)*

Initial engagement in April

* <https://us-56595.app.gong.io/call?id=3462223747963090731>
* <https://us-56595.app.gong.io/call?id=4604135196049169058>
* <https://us-56595.app.gong.io/call?id=8673431345029870124>
* <https://us-56595.app.gong.io/call?id=2229408846509169186> (Ali + Arjun onsite)

After Reconnect in July (most relevant)

* <https://us-56595.app.gong.io/call?id=7924517790592194488>
* <https://us-56595.app.gong.io/call?id=2831024927795171409>
* <https://us-56595.app.gong.io/call?id=1060300484060458314>
* <https://us-56595.app.gong.io/call?id=596478576492580852> (Commercials)
* <https://us-56595.app.gong.io/call?id=4018711836905198901> (VOC)
* <https://us-56595.app.gong.io/call?id=8411860981079838910> (More Discovery)
* <https://us-56595.app.gong.io/call?id=6261461696919887046> (Technical Alignment - important)
* <https://us-56595.app.gong.io/call?id=2056231916855598661> (Sandbox review pt 1)
* <https://us-56595.app.gong.io/call?id=514462080804383045> (Sandbox review pt 2 - important)