USE THIS UPDATED VERSION INSTEAD [HERE](https://docs.google.com/document/d/11CqZFPGYa52i3d7hsf6aC9Pf3c6DwdPDWbiTx_rdXLE/edit#heading=h.kpy0upq2lmk1)  
  
: The scoping pre-work doc creates efficient and clear communication between GTM and Product leads ahead of Scoping calls. Scoping is necessary for Netsuite integrations or QBO with custom tolling or requirements.

Requirement: Please complete the required information and deliver it to your product partner 24 hours before your Scoping call.

| **Prospect Details** | |
| --- | --- |
| Prospect name | [Company Name]  [Website] |
| What do they sell? | Products: [y/n] Services: [y/n]  [Description of product offering] |
| Who is in the meeting? | [Name+Linkedin hyperlinked] |
| Who is the end user? | Who is the end-user? Who is Decision maker? |
| How what is their billing model? Events? Milestone? | Example:  Flat fee + usage based on things in the field (For example- we helped 500 residents of this company become more energy efficient) |
| How quickly do they go from sales to invoice? | Example: Invoices are tabulated at EOM. |
| Is all their billing info in one contract or is it multiple (MSA+ PO/Amendments)? | This Merchant has MSA that get adjusted with annual amendments |
| **Technical** | |
| Are there remittances? | Unsure |
| SFDC or other CPQ product? | Unsure |
| Other softwares? | n/a |
| *Miscellaneous* | |
| Did they supply any additional docs? | Will by April 2, 2024 |
| Is there anything you already know we don’t support? |  |

## Merchant

Scoping start date: 3/20/24

Implementation Completed Date (Go live date): Apr 3, 2024

MSA Signature Date: Mar 29, 2024

GTM POC: Rebecca

ERP: QBO

Tax Integration: QBO Hard Coded Taxes

### 

### Key people at Merchant

### Sun Choi (fractional CFO)

### Company summary

Talkable offers referral marketing software solutions, enabling businesses to create and manage referral programs that drive customer acquisition and retention effectively.  
  
AM Notes

N/A

### Billing model

* Frequently have ToS/MSA + order form (2 separate docs)
* Mix of annual / quarterly / monthly
* About 50 bills per month

### Contract Processing Steps

Launch/Implementation Dates

* Launch Date = Live Date, which is undetermined at the date of the contract signing. Default to signature date if no kick off call or launch date defined in contract.
* Default to 1 month implementation date if no implementation date or time period listed  
    
  End Date
* For contracts that have an **end date in the past,** we will set the end date to 6 months from now & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **do not have an end date,** we will set the end date to 6 months from today, & merchant will let us know if the customer cancelled, sent an amendment, or sent a renewal agreement
* For all contracts that **have an end date in the future but potentially ends within the next few months,** we will go by the end date of the contact unless we hear otherwise.

### Events Processing (if necessary)

N/A

### Customer Information

* Not known at this time

### Feature Requests

* Rev rec
* ARR reporting
* Custom dunning - customized messaging, and post-30 day automated escalations
* Interested in late fees - either charging them or threatening to charge them based on aging

### Rewatch Calls

* <https://tabs.rewatch.com/video/ovp0a9yix25l4w7c-sun-rebecca-tabs-demo-march-22-2024>
* <https://tabs.rewatch.com/video/erxxc0sxcuutq67v-talkable-tabs-onboarding-april-3-2024>