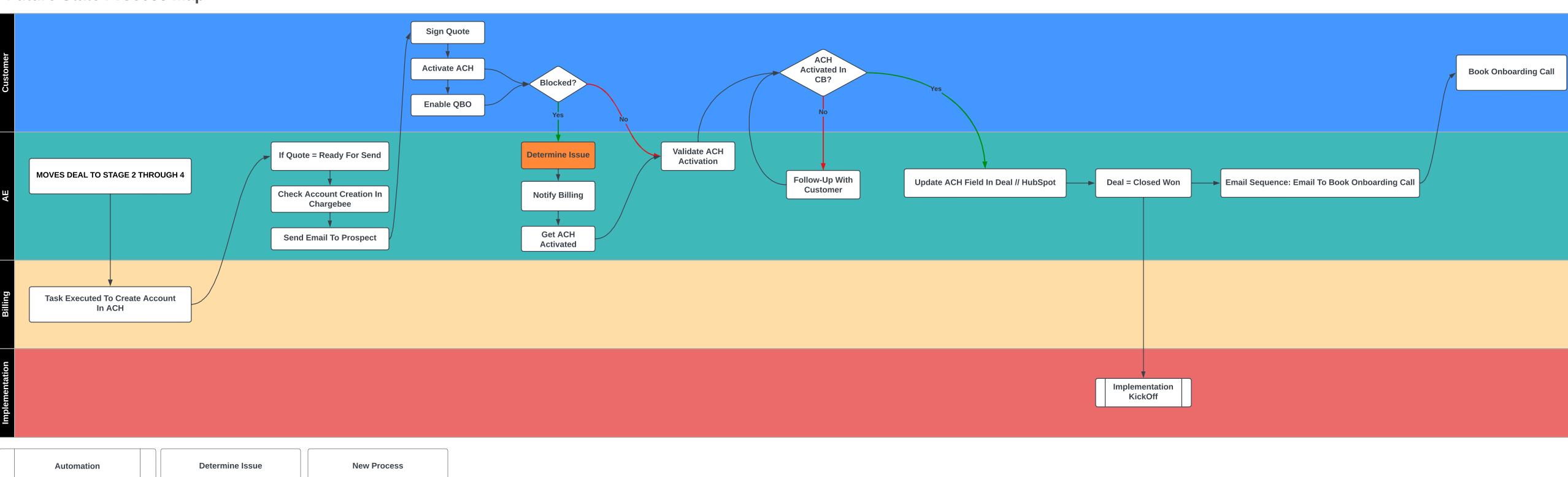


4. Upgrade Chargebee to PC2.0 & Upgrade to HubSpot QTC to enable auto creation of payment links when quotes are created...

# **Future State Process Map**



### **KEY DIFFERENCE:**

- 1. DEAL WILL NOT BE MOVED TO CLOSED WON UNTIL
- a. Quote Signed b. ACH Activated
- i. Billing team will still validate ACH once ticket is created ii. AE updates field on DEAL (Commission Qualifiers - ACH Activated = YES)
- 2. BILLING WILL STILL CREATE ACCOUNTS IN DEALS 2-5
- a. AES ALL HAVE ACCESS TO CHARGEBEE TO ACTIVATE ACCOUNT
- 3. QUOTE EMAIL DOES **NOT** CONTAIN ONBOARDING CALL LINK
- 4. REQUIREMENT: AE&BILLING WILL CHECK CHARGEBEE TO VERIFY ACH ACTIVATION/CHARGEBEE
- 5. SEQUENCE TO BOOK ONBOARDING CALL WILL BE USED (AUTOMATED) ONCE DEAL IS SET TO CLOSED WON

- 1. SHOULD THE BILLING TEAM STILL ACTIVATE ACCOUNT CHARGEBEE? YE
- 2. WOULD ALL AES NEED ACCESS TO CHARGEBEE OR CAN WE DESIGNATE? YE 3. DO WE GIVE SEPARATE ACCESS TO EVERYONE ON SALES TEAM? YE
- 4. SHOULD THEY BE ABLE TO BOOK THE ONBOARDING CALL IF ACH IS NOT ACTIVATED AT POS? N
- 5. HOW DOES THE AE/TEAM KNOWN THAT ACH IS ACTIVATED IF NOT BLOCKED? #business-ops channel notification and Chargebee

## APPROVALS:

HOW WILL WE HANDLE LEGACY PROCESS DEAL WONS?

a. Now that deals will not move to Closed Won unless the ACH is activated, Onboarding calls may still be booked prematurely but tickets will not be created and controllers will not be assigned.

- 1. Create a clear process for impacted teams:
- 2. AE: Immediately reach out to customer and activate ACH and get deal to closed won 3. OBS: Work to support the AE and communicate in the channel that this is an edge case
- ii. We should have a process to include the AE on the call to close the gap <u>or</u> the OBS works to close the gap
- iii. How do you think we should handle when OB call is booked and ACH is not activated??

- a. 2 hours before call: i. Implementation Specialist will introduce themselves and send email to customer about Call:
- b. <u>During call:</u> i. Activate ACH with AE
- ii. Close Gaps
- iii. Schedule another meeting with Controller + why