ChartMogul

Technical Scoping Session

Get a 1-hour consultation to untangle messy billing and get metrics you can trust.

At ChartMogul, we talk to founders and leaders every day. We understand that historical data and complex billing practices can make calculating subscription metrics difficult. That's why we've designed this technical scoping session to build an actionable plan that will turn your data into reliable metrics.

Why you should gather your requirements early?

Only a thorough understanding of your billing practices will allow you to track sophisticated subscriber analytics. Understand the ins and outs of your billing practices and uncover unexpected elements early so you can answer any question about your SaaS business with a few clicks.

After this 1h session, you will have:

- Insight into how your billing practices impact the calculation of subscription metrics and the technical requirements to track metrics within your organization.

- An understanding of how your data matches the ChartMogul Subscription Analytics Platform and what it will take to get up and running.

- A solid understanding of the technical requirements to track SaaS metrics within your organization.

To prepare for the technical scoping session

- Bring a sample invoice.

- Attend the session with a business lead and a technical lead. To get the most out of the session, you need someone with an exhaustive understanding of both the business processes and data structures.

The scoping process will cover:

Customer lifecycle
From lead or trial creation to contract renewal, each stage of the customer lifecycle requires acute attention so that you can optimize for growth and retention - and every subscription business is different. We'll map out your full customer lifecycle, so your subscription analytics reflect the touchpoints that impact revenue.

Pricing & plans
Next, we'll map out your pricing and packaging: the frequency at which you charge your customers (whether it's monthly, quarterly or annual), and your pricing strategy. Also, consider if there are any irregularities to your pricing or how other components (i.e. add-ons, professional service charges) impact your pricing.

Billing infrastructure & practices
Consider all the systems that you use to bill and interact with your customers. Payment gateways like Stripe, Recurly, PayPal, subscription management solutions, and dunning tools are key sources of data that interact and affect your metrics.

Finally, we'll discuss how key billing practices influence SaaS metrics. Do refunds affect MRR? How is tax handled?