



# Subscription Management Without Surprises

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**Bizzabo Chooses SaaSOptics  
to Automate Financial Operations**

## CASE STUDY

### CHALLENGE

Six-month implementation, unmet expectations and lacking capabilities lead to headaches with another popular revenue recognition software.

### SOLUTION

SaaSOptics delivered with a six-week implementation, a bi-directional sync across existing systems and flexible, built-in integrations leading to a successful, cost-effective partnership.

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SaaSOptics  
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One of the fastest growing event technology companies in the world, Bizzabo is on a mission to bring people together and make events more rewarding for everyone with its SaaS solution that streamlines professional event planning, from websites to payments and registration.

From inception, Bizzabo used manual processes to manage its financial operations. As the company grew, financial operations became more complicated and time consuming. Looking for automation, Sarah Borrmann, Business Applications Manager at Bizzabo, discovered another cloud-based subscription management platform for subscription businesses. "We were manually emailing customers to request payment and knew this was not sustainable," she said. "This other platform promised to automate billing and provisioning and was a really attractive alternative to our current way of managing our financial operations. The hands-on sales process and long list of capabilities gave every indication that this platform was exactly what we needed."

*"SaaSOptics transformed our financial operations. Working with a platform that is purpose-built for B2B SaaS and delivered by a truly supportive provider has made all the difference."*

**Sarah Borrmann**  
Business Applications Manager, Bizzabo



In an ideal world, this would be the end of the story, but for Bizzabo, it was just the beginning.

### Smooth Sales Process, Rough Implementation Before SaaSOptics

In January of 2018, Bizzabo began what would be a six-month implementation. Having invested money in the platform, Borrmann and her team were now investing a lot of time, only to discover that the implementation team was contracted out by the provider, which they were not previously made aware of during the sales process.



"Implementation took far longer than we were led to believe it would take," she said.

Knowing that there can be hiccups with any move to new technology, Borrmann was committed to seeing things through. Although a long and unexpected process, when the implementation was complete, Bizzabo's invoicing was automated. Borrmann expected things would get easier as her team got more comfortable with the platform's features.

*"When the contract was signed and the implementation started, the smooth sales process didn't translate to implementation and things began to fall apart."*

Over the next few months, it became clear that the platform's capabilities had been overstated and lacked the flexibility and many of the capabilities Borrmann and her team needed. No training was offered by the vendor, so adoption among Bizzabo employees was low. At the same time, new problems began to arise.

"Changes to contracts or billing terms were a nightmare," said Borrmann. "If a customer switched from monthly to quarterly billing, I had to delete their entire subscription record and all of their product data, completely recreate it, reconcile what they paid in the past and send the invoice again."

With all they had invested in the platform, Borrmann and her team forged ahead, trying to make the best out of the situation and find a way to make the platform work for their business.

### **Time for a Change: Introducing SaaSOptics**

Nine months later, Bizzabo's CEO met Tim McCormick, CEO of SaaSOptics, at a conference. The difficulties experienced with the company's current subscription management platform meant the bar was set high for any replacement, but Borrmann and her team decided to take a look.

"After the first call, I could see the potential of SaaSOptics to give us the freedom and flexibility we needed," she said. "SaaSOptics was very thorough and seemed to have the integrations and features we needed." Borrmann's due diligence was extensive. She did her own research, tracked down several SaaSOptics customers on LinkedIn and contacted them directly to get their take on the platform. The positive customer feedback was another step forward, but there was one more thing Borrmann needed.



## The SaaSOptics Difference

Salesforce integration was a key factor for Bizzabo, so Borrmann wanted to make sure the integration and workflows between Salesforce and SaaSOptics were seamless before making the switch. She wanted to see SaaSOptics in action. “The ability to experience SaaSOptics hands-on and process transactions gave me the confidence I needed to move forward,” said Borrmann.

Data migration was also a concern. The previous provider required Borrmann to conduct the entire migration process on her own with little support. “I spent nearly a month manually entering data into spreadsheets that the provider would then load into the platform,” she said. “The data migration specialist at SaaSOptics really took the time to work with us. It was a totally different process — much smoother and faster.”

*“After the first call, I could see the potential of SaaSOptics to give us the freedom and flexibility we needed.”*

## Fast Implementation and Integrations that Deliver in Six Weeks

Bizzabo was up and running with SaaSOptics in six weeks. Today, the SaaSOptics Salesforce integration and bi-directional sync automatically pull new sales orders into SaaSOptics with items, amounts and sales-negotiated terms. Borrmann and her team can easily create renewal opportunities using SaaSOptics to populate Salesforce with reminders for sales and account management and sync back important finance details like invoices, payments and subscription metrics that filter into Salesforce reporting.

SaaSOptics also allows Bizzabo to leverage Stripe to process customer payments. “The Stripe integration offered by our previous provider lacked the option to send the customer an invoice via email with a link to pay via credit card,” Borrmann said. “We were told that the capability for a credit card link was a custom feature that would cost an additional \$7,000. With SaaSOptics, we generate and send customizable, itemized and branded invoices to customers with click-to-pay via Stripe directly in the email. It saved us time, and we get paid faster.”



## Advice for Other SaaS Businesses

Through the experience of the first platform, Borrmann learned what to look for in a subscription management platform and freely shares advice to other growing SaaS businesses. "Working with SaaSOptics has been a completely different experience and showed us the importance of using a platform designed for B2B SaaS," said Borrmann.

"The platform you choose should be flexible and have built-in integrations that allow you to use the solutions and processes that work for your business – without charging additional developer fees. The provider might seem tuned in during the sales process, but dig deeper and talk to real customers to make sure the provider will be a true partner and offer the support you need to be successful long-term. With SaaSOptics, we found a more cost-effective subscription management solution with better support and features, but we also found a partner."



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