

Unified Subscription & Billing Platform for a Cloud Data Security SaaS Provider

 **Billing and Finance**  **Salesforce + MuleSoft**  **US**

Our Customer

A global cloud-native data security and backup solutions provider offering SaaS-based services such as data protection, disaster recovery, and compliance management to enterprise customers. The organization operates at scale with complex subscription models, including tiered and usage-based pricing, along with multi-region compliance and a strong partner ecosystem.

With rapid growth, they required a unified and automated platform to streamline subscription lifecycle, billing, and integrations across their ecosystem.

Objective

- ✓ Disconnected systems across CRM, subscription management, billing, and support ecosystems
- ✓ Complex subscription models including usage-based, storage-based, and tiered pricing
- ✓ Manual invoicing and reconciliation for high-volume, global transactions
- ✓ Limited real-time visibility into customer usage, renewals, and revenue
- ✓ Integration failures impacting provisioning, billing accuracy, and customer experience
- ✓ Challenges in handling multi-region taxation, compliance, and partner-led sales models





What We Did

- ✓ Centralized Salesforce as the system of record for customers, subscriptions, and revenue
- ✓ Built a scalable, usage-based subscription and billing framework (renewals, upgrades, lifecycle automation)
- ✓ Implemented MuleSoft API-led integration for real-time, resilient system connectivity
- ✓ Integrated billing, tax, provisioning, and support platforms into a unified ecosystem
- ✓ Automated invoicing, payment reconciliation, and real-time revenue tracking



Lessons Learned

- ✓ Usage-based SaaS businesses require tightly integrated billing and provisioning systems
- ✓ Real-time data synchronization is critical for accurate billing and customer transparency
- ✓ API-led integration ensures scalability and resilience in distributed systems
- ✓ Flexible subscription models are essential to support evolving SaaS offerings
- ✓ Decoupling systems improves performance, reliability, and maintainability



Value We Offered

- ✓ 50%+ reduction in manual billing and reconciliation efforts
- ✓ Real-time visibility into customer usage, subscriptions, and revenue metrics
- ✓ Improved billing accuracy for usage-based and tiered pricing models
- ✓ Scalable architecture supporting global expansion and high data volumes
- ✓ Enhanced customer experience with seamless provisioning and billing
- ✓ Faster onboarding of new offerings and pricing models



Conclusion

We enabled the organization to transform its subscription and billing ecosystem into a scalable, automated, and usage-aware platform, resulting in:

- Improved operational efficiency and reduced manual overhead
- Accurate and transparent billing aligned with customer usage
- Real-time insights into revenue and customer lifecycle
- A future-ready architecture capable of supporting rapid global