ESTUATE

Ocrolus steps up in the subscription market with Estuate

Ocrolus is a FinTech company that automates data verification and analysis for bank statements and other financial documents. The Company analyzes e-statements, scans, and cell phone images of documents from every financial institution with over 99% accuracy.

1. Business Challenge

Ocrolus was looking for a scalable subscription management platform that could help them:

- Reinvent their subscription model with a modern and scalable solution

- Simplify their complex pricing and ensure fast and accurate billing of metered data

- Automate their subscription management processes and reduce the manual labor involved

- Integrate billing with Salesforce CRM to enable easy tracking of sales growth and generation of real-time reports

Ocrolus Case Study

2. Estuate Solution

Estuate worked with Ocrolusto implement Zuora ensuring success in all 9 key areas of their subscription economy.

1. Price
Built a solution to help the client easily configure pricing based on product and usage type

2. Acquire
Developed a quoting process through their existing CRM to enable seamless customer acquisition

3. Bill
Automated their billing mechanism to ensure accurate billings on 1st of every month

4. Collect
Simplified the collection method by sending payment links and email notifications to customers

5. Nurture

Offered customized enhancements and added features to ensure smooth and efficient subscription management

6. Account

Provided guidelines and procedures to ensure closing of accounts on a monthly basis

7. Measure

Enabled custom reports for easy and accurate tracking of business performance

8. Iterate

Trained the client's teams on the new features of the subscription platform and offered full go-live support

9. Scale

Helped Ocrolus launch and ramp up their business through Zuora's scalable subscription platform

3. Business Impact

Estuate built a modern and profitable subscription platform for Ocrolus, delivering some outstanding business results.

Fast, accurate and reliable billing mechanism for diverse product ranges and users

Enhanced visibility of business performance through real-time reporting

Enhanced business user experience for their sales reps using salesforce

Significant reduction in time and costs along with improved efficiencies

Ocrolus Case Study

Testimonial

" Estuate's responsive and agile team has been an absolute pleasure to work with. They understood our complex business model and did everything to make sure Zuora was a good fit for us.

- Elizabeth Sabbatini,

Director of Customer Success, Ocrolus

Talk to our experts

+1 408-946-0002

contactus@estuate.com

About Estuate

Estuate is a global Product Engineering and IT Enterprise Services company headquartered in Milpitas, CA, and with offices in Canada, India and the UK. The company specializes in leading edge technology solutions in IoT, AI and Digital Transformation solutions. The focus areas and practices that leverage these technologies are Product Engineering Services, Data & Analytics, Subscription Billing & Revenue Management and Governance, Risk & Compliance.

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