



# HOW TO BUILD A **ROBUST** **REVENUE INFRASTRUCTURE**

Discover the systems, processes and teams you need to successfully deliver revenue and power SaaS growth



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# Payments

Optimal payment and billing processes require integrations with multiple payment gateways, plus initial banking setup, followed by ongoing iteration and maintenance from your engineering team. Having efficient processes is crucial for reducing payment failures and maximizing every revenue opportunity.

## Things you'll need to do:

- Set up a merchant account
- Integrate with at least 2 payment processors
- Offer local currencies, everywhere your customers are based for better conversion rates
- Provide the preferred local and alternative payment methods
- Manage foreign exchange fees
- Send and process invoices

## Payment processors



## Payment methods





# Subscription billing and management

Subscription billing and management tooling enables you to create a seamless experience for your customers and makes it easy for your team to manage recurring billing and user data. Getting subscription billing right helps you retain customers and achieve higher revenue growth.

## Things you'll need to do:

- Integrate with subscription billing and management software (or build the logic in-house)
- Integrate subscription billing logic with payment processes
- Implement processes for dunning and payment retries
- Ensure sales tax and payment compliance on recurring billing

## Subscription management software:



Recurly

zuora

Chargebee



sage

Intacct

**Billsby**



# Sales tax and financial compliance

Staying compliant with payment and sales tax regulations involves understanding your liability everywhere your customers are based so you can continue to operate globally without incurring penalties and fines.

## Things you'll need to do:

- Implement compliant checkout processes, invoices, and customer communications
- Integrate with tax compliance software (or develop the technology and processes in-house)
- Calculate how much tax you owe in each jurisdiction
- Find local tax representatives (this is mandatory in some some jurisdictions)
- File and remit tax payments in each jurisdiction
- Collect and store evidence in case of an audit
- Stay up to date with new and changing regulations (then update your processes accordingly)

## Tax compliance software





# Fraud prevention and risk management

The processes to detect fraud and protect both the business and its customers from fraudulent transactions. Though most providers offer some protection, there are varying levels of support for managing disputes and chargebacks. Without proper fraud and risk management in place, you risk penalties and damage to your business' brand and customer relationships.

## Things you'll need to do:

- Integrate with fraud protection and risk management software
- Implement policies, procedures and tooling for managing disputes and chargebacks
- Present relevant documentation to pass Know Your Customer (KYC) and Anti-Money Laundering (AML) checks with your software partners (e.g. your payment processor)
- Optimize payment processes to reduce the likelihood of false payment declines and offer a frictionless experience at the checkout
- Invest in the latest technologies, like machine learning or artificial intelligence to stay one step ahead of fraudsters

## Fraud prevention software





# Buyer support

Customers need support with queries relating to their subscription, billing and payments. Providing this service involves creating a seamless customer experience, and hiring a first-class team that can support customers, wherever they are based. Getting buyer support right increases customer satisfaction and builds trust in your brand.

## Things you'll need to do:

- Hire a support team that can support customers in their local time zone (with FTEs or through a third-party)
- Implement customer support software so the team can manage tickets and work flows
- Set up processes for refunds, subscription changes and cancellations
- Send out regular customer satisfaction surveys (and analyze the results)

## Buyer support software





# Reporting and analytics

Clear and accurate user and revenue data on the metrics that will power your SaaS growth. This involves connecting systems together and aligning the metrics you need to track to your goals (and updating them as you grow).

## Things you'll need to do:

- Implement a reporting software (and integrate it with your existing tooling)
- Set up processes for revenue recognition and financial reporting
- Analyze your data frequently to inform your business goals (e.g. monthly, quarterly)
- Add any additional sources of data or new metrics you want to track as you scale
- Use the data to understand customer behavior, improve product adoption rates, and create effective marketing strategies

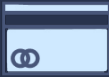
## Reporting and analytics software





# paddle

The all-in-one **revenue delivery platform**



Payments



Subscription billing  
& management



Sales tax & financial  
compliance



Fraud prevention



Buyer support



Reporting & analytics

Paddle doesn't provide the different pieces of your revenue infrastructure, **it is your revenue infrastructure.**

Our all-in-one platform is a complete revenue solution for SaaS businesses.

Want to find out more?

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