

How Lattice achieved 90% increase in billing efficiency with ZoneBilling and ZonePayments



Lattice, a leading people management platform designed to enhance employee performance and engagement, faced significant challenges in managing its billing and financial processes as it transitioned from a startup to a rapidly growing company. As the complexity of their subscription management grew quickly, the lack of integration between the company's existing tools (NetSuite, Salesforce, and Stripe) forced the team to depend on manual processes. Increased inefficiencies led Lattice to seek an advanced billing solution that could automate subscription management, optimize financial processes, and easily integrate with their existing systems.

The Challenge: Manual billing management, disconnected systems, and scaling limitations

With a subscription-based SaaS business model and the company very much transitioning from startup to mature business, Lattice's existing order-to-cash (O2C) systems and processes could not scale. It needed a more robust billing engine.

The company had significant challenges in its billing operation due to multiple subscription types, mid-contract changes, and completely manual billing and reconciliation processes. This resulted in lengthy billing cycles, errors, and a major resource burden for its revenue accounting organization and the billing team.

Lattice is a leading AI-enhanced people platform designed to enhance employee performance and engagement through various HR tools and analytics. Lattice provides features such as performance reviews, goal setting and tracking, real-time feedback, employee engagement surveys, and comprehensive HR analytics.

www.lattice.com

Company Size: 500–1,000 employees

Industry: HR Management Software

Headquarters: San Francisco, California

Products: ZoneBilling & ZonePayments

Integrated Softwares: NetSuite, Salesforce, Stripe

Involved Teams: Finance, Billing, Operations, Sales, IT

Key outcomes

- ◆ 90% increase in billing efficiency
- ◆ Flexibility with subscription changes
- ◆ Accurate prorated calculations
- ◆ Improved financial accuracy
- ◆ Automated payment application
- ◆ Improved compliance and control





“The complexity of our deals was too much for our billing system, so we had to use spreadsheets for accurate tracking. This significantly increased our manual workload.”

- Lakshman Manoharan,
Head of Business Systems at Lattice

The main hurdles preventing the company's ability to operate smoothly and scale were:

- ◆ **Disparate systems and lack of integration:** Lattice relied on multiple disconnected systems for different finance functions, such as NetSuite, Salesforce for CRM, Stripe for billing, and other bespoke tools. Reconciling data between these systems manually was inefficient and unsustainable. The system had difficulty with varying billing scenarios, prorated billing, and contract changes. Managing data in Excel spreadsheets outside of NetSuite was also a major burden on Lattice's finance team due to platform limitations, lack of integration capability, and manual effort required.
- ◆ **Resource-heavy manual billing process:** The manual billing process required the involvement of multiple specialists for around four to five hours per day. This included multiple billing analysts uploading and coding invoices, tracking deals, and making adjustments. The entire process was heavily reliant on manual effort and was increasing workload and lengthening billing cycles, bringing a greater chance of human error within the process. Proration was calculated within Salesforce, however, accurately reflecting this calculation within NetSuite was proving difficult.
- ◆ **Delayed invoicing and customer queries:** Because of system limitations, the team found it difficult to manage and track complex subscription offerings in NetSuite. Inefficient processes lead to delayed invoicing and errors on occasion, like adding wrong data to the system or invoicing the customer the wrong amount.

The Solution: Subscription billing automation for HR SaaS with ZoneBilling and ZonePayments

Lattice needed a user-friendly, easy-to-use solution that would fit directly inside its existing NetSuite workspace so that the company could achieve accurate, timely, and efficient payments. The tool needed to be capable of bringing all the billing data from Salesforce CPQ and Stripe into the ERP and empower the finance team to completely automate manual billing, reconciliation, revenue recognition, reporting, audit, and other finance processes while supporting the growth of the business.





“ZoneBilling was the only solution that gave us a single view and single point of control for all of our subscription billing needs in NetSuite.”

- Lakshman Manoharan,
Head of Business Systems at Lattice

To meet the company's needs, the advanced billing solution needed to fulfill five specific criteria:

- ◆ A strong NetSuite, Salesforce CPQ and Stripe integration with all data flowing in NetSuite
- ◆ Multiple subscription offerings, mid-contract modifications, non-annual subscriptions, and different pricing scenarios
- ◆ Complete automation of billing, reconciliation, revenue recognition, and reporting with no manual work
- ◆ Scalability and ease of change as the business grows and becomes more complex
- ◆ Transparency, controllability, and auditability with a full view of the financials

After a thorough evaluation and recommendation by its Chief Accounting Officer and outside consulting partner, Connor Group, Lattice chose NetSuite SuiteApps **ZoneBilling** and **ZonePayments** by Zone & Co. These billing automation and cash application tools for AR teams met every single requirement Lattice specified and combined provided an end-to-end solution for Lattice's order-to-cash (O2C) in NetSuite.

Why Lattice chose ZoneBilling and ZonePayments:

- ✓ **NetSuite integration for complex subscription management:** Lattice has many different types of pricing structures and scenarios, such as annual contracts with mid-term changes, prorated billing, and non-annual contract terms. ZoneBilling has the capability to easily handle each, including the seamless creation and application of credits through negative line items. The solution **integrates with NetSuite** and Salesforce **CPQ** to ensure accurate billing and revenue information is shared across all systems.
- ✓ **Automated billing and revenue recognition:** ZoneBilling handles everything from invoice creation to **revenue recognition** and reporting automatically. This means there are fewer manual entries, fewer errors, and more accurate and timely financial reports, which leads to greater compliance.
- ✓ **Payment gateway integration:** **ZonePayments integrates with Stripe**, Lattice's payment gateway provider, which allows for automatic payment collection and cash reconciliation. With Zone & Co's AR solutions, Lattice could continue to use Stripe as the backend payment gateway, providing the same user experience to its customers, and have all transactions posted into NetSuite.



Book a demo today and find out how ZoneBilling and ZonePayments can meet your specific business needs





Scalability: As Lattice continues to grow and its business processes become more complex, ZoneBilling and ZonePayment's scalability ensures that the company's core financial system can accommodate higher transaction volumes and more complex billing situations and requirements without compromising performance.

Lattice's consulting partner, Connor Group, led the implementation with technical support from the Zone & Co team. This close collaboration ensured the project was delivered on time, and the integration between Salesforce CPQ, Stripe, NetSuite, ZoneBilling, and ZonePayments flowed seamlessly.

The Result: Efficiency gain, enhanced financial accuracy, and subscription management agility with ZoneBilling and ZonePayments

ZoneBilling and ZonePayments enabled Lattice to manage recurring revenue, view subscriptions from end-to-end, automate billing operations and revenue recognition, eliminate manual payment reconciliation, and improve financial reporting. These capabilities supported the company's business goals and significantly enhanced financial performance in multiple ways:



90% increase in billing efficiency: The daily routine that involved multiple billing analysts spending on average four hours daily is now executed in less than two hours by just one billing analyst. One person doing the work that previously required the efforts of four or five people, allows the team to redirect their focus from manual invoice data entry to more meaningful activities such as monitoring collection health and timeliness, answering customer questions about invoices, and improving customer satisfaction and retention.



Flexibility with subscription changes: With ZoneBilling, Lattice can natively accommodate **different changes to subscriptions within NetSuite**, such as cross-selling, adding additional product offerings into the mix mid-term, upselling, or updating the number of user counts. These modifications are handled in CPQ and flow automatically to the billing side of the house to ensure proper invoicing. This allows the team to see what's changing and understand how invoicing and revenue recognition need to be structured and what rules to apply.



Accurate prorated calculations: ZoneBilling has enabled the billing team to easily make prorated calculations and replicate changes in the billing system. This results in accurate prorated invoices following the actual usage and contracted terms with the customers, which the older system lacked. Any changes made in SFDC are automatically reflected in the NetSuite billing system, allowing the complete process to function synchronously.





“The leap from our previous system to now has been night and day for prorated calculations. We’ve bridged the gap between Salesforce and our billing system in NetSuite thanks to ZoneBilling.”

- **Lakshman Manoharan,**
Head of Business Systems at Lattice



Improved financial accuracy: There is no more room for manual entry, errors, and time delays that would previously appear when the wrong data is entered into the system, or the customer is billed incorrectly. The automation ZoneBilling brings makes Lattice's reporting much more accurate, leaving no room for gaps, constraints, or bad data as part of that process. The team always knows what products their customers are using at any given point in time, and what they are being invoiced for, properly accounting for all transactions in NetSuite.



Automated payment application: When the invoice gets created, ZonePayments then generates all the payment links. The links are then sent to customers to pay the invoice through the Stripe payment gateway. Customers have the option to pay using a variety of different payment methods, including ACH bank transfers and credit cards. The payment application process at Lattice now also allows for multi-selection and application of payments using a first-in-first-out (FIFO) logic, ensuring the oldest invoices are prioritized for closure upon payment receipt.



Improved compliance and control: With traceability and granular auditing of subscriptions, contract amendments, and financial transactions that ZoneBilling delivers, the billing team knows when and where the amendments occurred, and how the changes relate to invoicing and revenue recognition. This logic makes everything easily traceable and shows whether all the data makes sense, helping Lattice's finance team prepare for both internal and external audits, and ensuring strict compliance with financial rules and standards.



“By automating our billing operations, ZoneBilling ensured we’re no longer a bottleneck for the sales team’s complex deals. We can now confidently say ‘yes’ to their requests and handle everything seamlessly without any additional manual burden.”

- **Lakshman Manoharan,**
Head of Business Systems at Lattice



Book a demo today and find out how ZoneBilling and ZonePayments can meet your specific business needs





"ZoneBilling and ZonePayments have been a game-changer for us. They streamlined our processes, reduced manual work, and provided the scalability we needed to support our growth. Our billing system no longer constrains us."

- Lakshman Manoharan,
Head of Business Systems at Lattice

The Conclusion: Touchless billing efficiency and futureproof operations with Zone & Co AR solutions

Together with ZoneBilling and ZonePayments, Lattice was able to move beyond the previous limitations. The digital transformation of their billing infrastructure is enabling them to not only automate billing, reconciliation, and rev rec, but also handle any complex deals processed upstream by sales.

ZoneBilling's advanced capabilities are poised to be a pillar for Lattice's expansion into **HRIS offerings** and handle the complexity of varying user counts across multiple product lines. The platform's scalability ensures Lattice can adapt to the unique demands of each product, including the nuanced revenue and expense management of partner referral programs.

With **AR solutions from Zone & Co**, Lattice is equipped to process all future complexities in a touchless, seamless manner, leveraging the combined power of NetSuite, ZoneBilling and ZonePayments to create efficient process streams and improve the financial and operational efficiency of the whole business.

3,000+ businesses like yours trust Zone & Co to solve their most complex billing problems in NetSuite. Book a demo today and see how you can bill and recognize revenue however you want in ERP, using ZoneBilling.

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