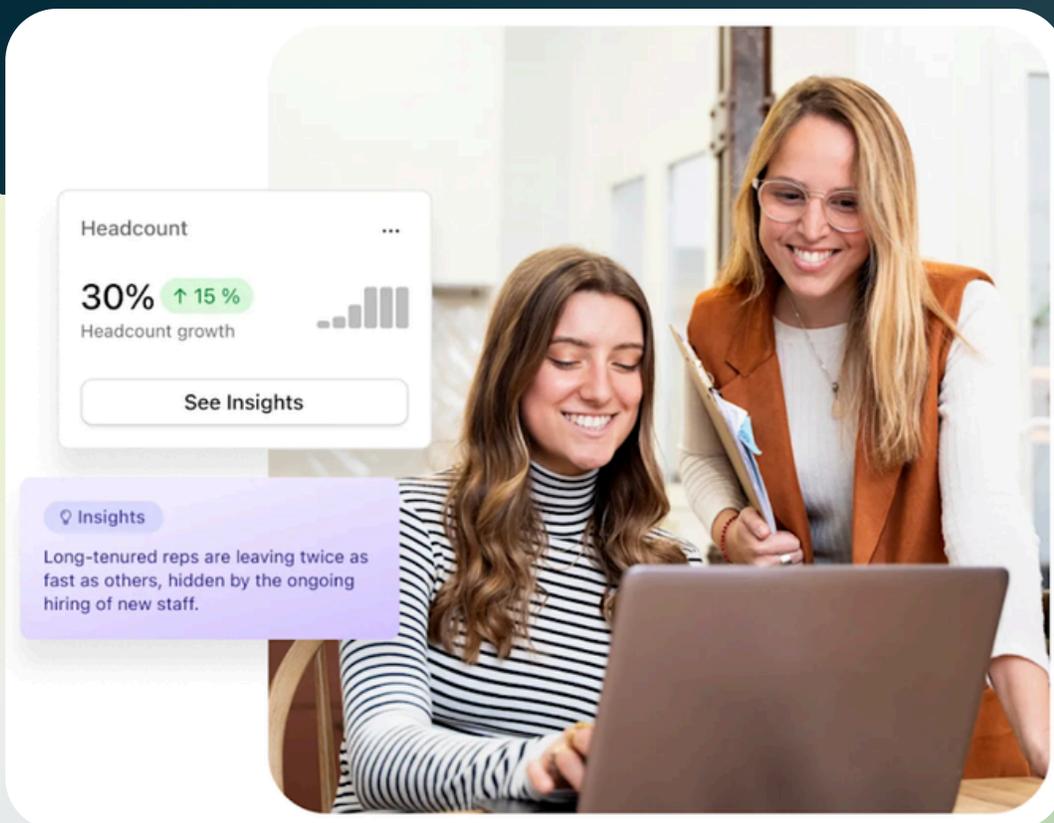




Billing

How Personio Reclaimed 1,000 Hours Annually Through Subscription Automation



See how Personio cut 1,000+ annual hours from their order-to-cash process using Chargebee's recurring revenue and subscription management platform. This efficiency boost enables their HR solutions to reach more businesses faster. Read the case study to learn how.

Before Chargebee

- Manual billing processes led to high workload and inefficiencies
- Subscription management tasks were unstructured and highly inefficient for all teams
- Pricing structures were difficult to adapt and scale

After Chargebee

- Reliable subscription insights improve decision-making and productivity
- Automation streamlines order-to-cash flow and supports geographic expansion
- Transition to usage-based billing drives customer value

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Chargebee's subscription and revenue growth management platform empowers Personio to streamline its order-to-cash flow and drive productivity for HR teams.

Personio, based in Munich, aims to revolutionize the work experience by streamlining HR processes for small and medium-sized businesses. With proactive insights, smart automations, and custom workflows, Personio serves over 14,000 HR teams, reducing recruitment time and doubling productivity, enhancing the employee experience for over a million workers.

CHALLENGE

Recurring billing issues stalled growth

Subscriptions have been central to Personio's business since the company was founded in 2015. Personio's target customers are SMBs, which make up over 99% of companies in the European Union. These organizations often have teams spread across different locations.

The subscription-based model allows Personio to serve these international companies flexibly. For example, Personio enables customers to manage multiple offices, address different types of worker demographics, and operate in various languages. However, this large market opportunity also comes with complexity.

As Personio grew, managing customer billing and accounts became increasingly difficult and time-consuming. The lack of automation in Personio's homegrown billing system created a lot of manual work and inefficiency for the team.

One particularly challenging task was sending out invoices. While the in-house system could generate invoices automatically, the aftersales team still had to send them individually. This wasted a significant amount of time and prevented the team from focusing on higher-value work.

After numerous iterations, Personio transitioned from its internal billing solution to a large recurring billing and subscription management software but soon found it wasn't flexible enough to meet its needs. The platform couldn't address Personio's immediate priorities without adding unnecessary complexity, and it was ultimately deemed unsuitable to support the company's growth.

Personio recognized the need for a robust subscription and revenue management platform that could provide reliable insights, streamline billing operations, and offer new avenues for growth, such as enabling pricing experiments.

“We took time to research our options, and when we came across Chargebee, it just blew competitive offerings out of the water. It presented the best price-for-value in the market and was transparent about expenses,” said Fabian Tretter, Senior Manager of Finance Operations at Personio.

SOLUTION

100K invoices processed in a **snap** with subscription management

When Personio deployed Chargebee, it didn't have a dedicated Billing Operations team. Instead, Personio trained staff from various departments across the organization, including go-to-market and aftersales, to use the new platform.

This approach empowered over 300 employees of 88 nationalities to manage subscriptions directly and query the platform for their needs. Chargebee quickly became Personio's central system for generating insights from subscriber data, providing a single source of truth to inform business decisions.

Personio's previous billing issues were quickly resolved. Chargebee eliminated the time-consuming task of manually sending out invoices, and its automated workflows enabled Personio to close payment reconciliation gaps.

Using Chargebee, Personio also improved its payment failure recovery process. The platform's pre-defined rules allowed Personio to automate dunning emails to customers at risk of churning or escalating cases to the collections team as needed.

As the business grew and Personio's team expanded, the company recognized the need to integrate Chargebee with other key systems.

The integration with Workday brought core enterprise resource planning and financial operations together, enabling Personio to **process over 100,000 invoices automatically**. Personio also established a dedicated Billing Operations team to manage integrations.

"Chargebee was the launchpad for our data-driven growth – our 'big bang' moment from which point onward our capabilities only expanded in ways we couldn't have imagined. For example, we initially didn't think about integrating Salesforce with Chargebee. However, after seeing how bringing subscription management and billing in sync immediately improved our productivity and customer experience, we were keen to join up more operations. Today, the majority of our core processes are highly dependent on Chargebee, and we're well on our way to making our entire quote-to-cash flow an end-to-end automated and seamless process" Tretter said.

RESULTS

Automating billing freed up thousands of hours for Personio's team

Using Chargebee to navigate the billing lifecycle and automate routine tasks, Personio can focus on improving its services and refining its customer retention strategy.

One area where Personio has unlocked competitive differentiation is pricing. In 2019, Personio offered all its services on a tier-based pricing model. Upon deploying Chargebee, it added more billing frequencies, giving customers the flexibility to choose a recurring payment option that works best for them.

Then, in 2020, working conditions changed, introducing more complex and diverse use cases. Personio used Chargebee's pre-existing features to evolve its pricing model again based on customer feedback. In 2023, Personio introduced [usage-based billing](#).

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Adopting usage-based billing for our Payroll product was a huge business decision for us. We heard our customers loud and clear – they wanted to pay only for what they consumed – but moving from upfront billing to post-pay naturally brought questions. Thankfully, Chargebee made the process seamless without requiring extensive developer involvement or creating new challenges for our Billing Operations team. Our pricing strategy now aligns with customer value, and the feedback is extremely positive.

Fabian Tretter,
Senior Manager of Finance Operations, Personio

Another improvement was EU VAT validation. As a company operating across Europe, Personio must keep invoices compliant by validating the VAT number of all its customers. However, with 27 member states, all with wide-ranging EU VAT rates and rules, this required hefty manual work from Personio. Chargebee simplified this complex and error-ridden task by automatically validating VAT numbers, saving **Personio nearly 1,000 hours of manual work.**

Personio continues to unlock new benefits and expand its use of Chargebee. Most recently, it has enabled Contract Term Management within the platform, allowing it to incorporate all its custom contract terms in one place to bill, manage subscriptions, and automate termination fee collection for its customers. This leads to more predictable recurring revenue for Personio.

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Chargebee just works, always and reliably, without any manual intervention. It has allowed us to grow our business and scale our billing operations to meet our customers' evolving expectations. It continues to transform how we work, and we look forward to seeing where our partnership takes us next.

Fabian Tretter,
Senior Manager of Finance Operations, Personio

Ready to harness the power of subscription billing and management to drive revenue growth for your subscription business?

[Get a demo](#)

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We evaluated several options, and Chargebee was the clear winner every time. Its flexibility and ease of use have made a real difference. By taking the complexity out of managing recurring revenue, Chargebee has helped us deliver on our mission to reduce the administrative burden on HR teams, allowing them to work more efficiently. This partnership has been a key driver of our growth.



Fabian Tretter,
Senior Manager of Finance Operations,
Personio

