



FMG's Big Subscription Billing and Revenue Growth Management Switch

Discover FMG's transformational journey of switching from a legacy subscription billing platform to Chargebee.

The FMG logo, consisting of the lowercase letters "fmg" in a bold, black, sans-serif font, enclosed within a white rounded rectangular box.

fmg



chargebee



Before Chargebee

- Inflexibility of Zuora's subscription billing platform
- Issues with the time between a booking and revenue recognition
- Lack of responsiveness and support from Zuora

After Chargebee

- Eliminated the difference between booking and subscription creation
- Decreased billing overhead and reallocated in the organization where it's more efficient
- All orders processed and standardized

When it comes to managing [subscriptions and billing systems](#), it's essential to have a flexible and reliable platform that aligns with business growth and customer expectations. [Dave Christensen](#), a seasoned Chief Product Officer at [FMG](#), the all-in-one marketing technology platform for financial advisors, shares FMG's transformational story of switching from Zuora to Chargebee for its subscription billing and revenue growth management.

Tech Stack

Finance
Netsuite

Operations
HubSpot

Analytics
RevenueStory

Products Used
Chargebee Billing, Chargebee RevRec

Drawing a line between the past and present

Christensen recounts the time when his company had used Zuora for years. "Zuora did some things well," Christensen notes, "but as our company grew and we made multiple acquisitions, Zuora's inflexibility became a bottleneck for us."

The switch to Chargebee brought about a much-needed shift. Christensen highlights Chargebee's "modern APIs" and continuous innovation as game-changers, allowing his engineering teams to seamlessly integrate systems and automate processes.

With Chargebee, the APIs are modern and not from 1998, so it's easier for our engineering teams to integrate directly and do the kind of things they want. Chargebee is constantly innovating. Even during our implementation phase, things that were nice to have when we were considering switching became available for us to use. Chargebee is consistently delivering on its roadmap. We had seen nothing new from Zuora in a long time.

Dave Christensen, Chief Product & Technology Officer, FMG

He praises Chargebee's ability to transform FMG's sales-led growth into immediate subscription creation. Christensen explained, "By implementing quoting inside Chargebee, we eliminated the difference between booking and subscription creation. It all happens automatically."

Efficiency unleashed

For a company focused on efficient growth, Christensen points out that a lot of headcount was tied up in manual billing processes before Chargebee. The billing team was oversized, mainly because they manually handled every order. Service teams struggled with billing-related data, leading to inefficient communication channels like ongoing Slack discussions to clarify billing queries.

Chargebee, however, not only streamlined this process by standardizing orders but also freed up valuable human resources, enabling the company to repurpose them in other areas to cultivate more organizational efficiency.

Navigating future expectations

When asked about his primary concerns, Christensen shared that keeping up with changing customer expectations is crucial. Billing requirements sometimes outpace software requirements, meaning that its billing platform needs to be as nimble as its products. "What keeps me up at night," he states, "is making sure I don't have to use resources on billing systems instead of improving our products."

Chargebee as a cultural fit

Reflecting on Chargebee's role as a partner in FMG's success, Christensen emphasizes that selecting Chargebee went beyond product features. He appreciates the cultural resonance between the two companies and their approach to innovation. Christensen expressed growing faith in Chargebee year after year, "We're really excited that we have a cultural fit with them."

The Chargebee difference in customer support

Comparing support experiences, Christensen speaks to the stark contrast between Chargebee and Zuora. Getting help from Zuora felt challenging, as Christensen encountered, "When we needed something from Zuora, nobody ever called us back, and when we needed something done, it was like pulling teeth to get it." But with Chargebee, he experienced proactive and immediate response—even during off-hours. When we needed something done, Chargebee was not only responsive but also personally committed to our success. He recalls, sharing a story of a Chargebee team member who assisted them in the middle of the night because "it was really important to [him]."

Conclusion

Christensen's testimony underscores his and FMG's confidence in Chargebee, where the switch has meaningfully contributed to FMG's success. With Chargebee on his side, he can sleep easier at night.

For companies striving for agility and efficiency in their growth trajectory, Chargebee stands out as a solution provider that brings more than just a subscription billing and revenue growth platform; it brings a partnership characterized by mutual innovation, cultural alignment, and dedicated support.



“If my billing platform lacks flexibility and fails to meet the demands of my top customers, it forces me to allocate engineering resources toward that task rather than utilizing them to enhance my products.”

Dave Christensen

Chief Product & Technology Officer, FMG

