Account Audit

Recurly

To optimize the revenue potential of your subscription business, it's critical that your billing platform is configured properly. A Recurly Account Audit allows you to leverage our Enablement Team's subscription, billing, and Recurly platform expertise. Our team will review your current use of Recurly features and tools, and offer suggestions on how to improve efficiency, reduce churn, optimize your subscriber experience, and increase revenue. In addition to providing best practice advice on your current setup, your Recurly consultant can review additional and updated features that can further accelerate your business.

The Recurly Way

We take a hands-on approach to auditing your existing Recurly account. A consultant from our Customer Enablement Team will provide recommendations on configuration changes that will impact your selected area of focus. A Recurly Account Audit project typically takes a week to complete.

Areas of Focus

Choose one of the following areas of focus for this project. We will review your existing setup and provide recommendations for improvements in the context of that topic

- **Revenue Recovery** - your dunning settings, email communications, and overall recovery strategy

- **Integrations** - your use of webhooks, Recurly.js, APIs, and exports to integrate Recurly with other systems

- **Features** - your use or potential use of existing functionality as well as features that are currently in development

Key Benefits

- Configurations tailored to your business requirements

- Best practice guidance on settings or integration changes

- Insight into the pros and cons of various approaches

Key Deliverables

- Themed account audit and consultation

- Recording of the recommendations meeting

- Recommendations document

Preparation

After meeting with you to kick off the project and review the scope of your selected area of focus, a Recurly consultant will review the components of your production Recurly setup. Depending on the topic, this may include your: company website, checkout flow, emails sent to customers, Recurly site, or Recurly integrations. They'll identify areas that require attention and opportunities to optimize your Recurly setup.

Validation

The consultant discusses their findings with you. They'll guide you step-by-step through relevant configurations in the Recurly user interface, and provide suggestions on how to make improvements where applicable. After the call, they'll follow up with documentation of the best practice recommendations that were discussed.

Terms & Conditions

This services engagement is governed by Recurly's standard Professional Services Terms and Conditions.

Want to Learn More?

For more information about our services, please contact sales@recurly.com.

[CONTACT SALES]

Why Recurly Professional Services?

Recurly's Professional Services team supports our customers and partners in the effective implementation and application of Recurly solutions to drive your company's success.

Our Professional Services consultants:

- Collaborate with you to develop the right solution for your needs
- Leverage their deep understanding of the technical capabilities of the Recurly platform
- Plan and execute complex and custom implementations
- Provide expertise on payment and technology integrations

Recurly

Recurly provides enterprise-class subscription management for thousands of businesses worldwide.

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