

Beyond Subscription Billing:

How Tribal Group drove Efficiency & Growth with LISA Enterprise & Dynamics 365 Finance.

Tribal Group is a global leading provider of education software and services, focused on international education, learning and training markets, operating through two main segments: Student Information Systems (SIS) and Education Services (ES). The company sought to modernize its subscription management processes as it faced challenges with financial process automation, governance over discount approvals, invoice consolidation and seamless integration with existing enterprise applications.

Managing complex subscription models was slowing down growth. Inefficiencies with a lack of automated governance, invoice consolidation and real-time financial insights, led to manual errors, revenue delays and increased administrative workload. To address these, Tribal Group implemented **LISA Enterprise in Microsoft Dynamics 365 Finance**, transforming its subscription management - streamlining subscription lifecycle management, automation and enhanced financial visibility with improved billing accuracy, and accelerated revenue recognition.

80%	Reduction in Manual Effort	Streamlined financial automation eliminated manual processing of invoices, discounts, and renewals.
x3	Subscription Growth Acceleration	Scaled operations efficiently without increasing administrative overhead.
99%	Billing Accuracy	Reduced human error in invoicing through LISA Enterprise's automated billing engine.

Business Challenges

Before implementing LISA Enterprise, Tribal Group faced several inefficiencies in managing its subscription-based operations:

- **Flexibility and fast GTM:** The ability to quickly and seamlessly add new products and services into their Subscriptions, offering Customer choice on payment options with instant reconciliation of cash collection.
- **Lack of Governance on Discounts:** Manual discount approvals led to inconsistencies, pricing misalignment, and approval bottlenecks.
- **Complex Invoice Consolidation:** Customers received multiple invoices for different subscription plans, causing confusion and payment delays. Complicated billing lead to renewal dates misalignment.
- **Transition from Legacy Licensing:** Merging perpetual support with subscription renewals required a seamless invoicing approach to maintain financial accuracy.
- **Manual Subscription Lifecycle Management:** Back-to-back subscription handling and supplier invoice tracking were manual, slowing operations and making profitability analysis difficult.
- **Inefficient Customer Communication:** Manual purchase order (PO) requests delayed invoice processing, with no automated system to capture and store PO numbers.
- **Limited Financial Visibility:** Finance teams lacked real-time insights into churn rates, annual recurring revenue (ARR), and profitability due to manual reporting.
- **Disconnected CRM & Financial Systems:** No seamless data flow between Salesforce CPQ and Dynamics 365 Finance, leading to inefficiencies in subscription sales and billing.

Solution

Tribal Group implemented LISA in Dynamics 365 Finance to automate subscription management, optimize financial processes, and enhance reporting capabilities. The following solutions delivered measurable business impact:

✅ Automated Governance for Discounts

Before: Manual discount approvals caused delays and pricing inconsistencies.

After: LISA Enterprise automated discount approval workflows, ensuring governance, compliance, faster decision-making, and operational efficiency across teams.

 **Impact:** 80% reduction in manual effort and streamlined approval processes.

✅ Invoice Consolidation & Renewal Alignment

Before: Customers received multiple invoices per subscription cycle, often leading to unnecessary confusion and significantly delayed payments.

After: LISA Enterprise grouped invoices by subscription plan and aligned renewal dates, reducing invoice complexity and improving customer experience.

 **Impact:** 70% faster invoice processing and improved cash flow.

✅ Subscription Transition from Legacy Models

Before: Legacy support and subscription plans were invoiced separately, complicating tracking.

After: Master Subscription Agreements linked perpetual support services with new subscription models for seamless and automated invoicing processes.

 **Impact:** 99% billing accuracy, reducing errors and disputes.

✅ Power Automate-Driven Email Communication

Before: PO number requests were manually handled, causing delays in invoice generation.

After: LISA Enterprise integrated with Power Automate to automatically request, capture, and store PO numbers, streamlining invoice processing.

 **Impact:** 60% reduction in month-end reconciliation time through automated PO validation.

✅ Automated Back-to-Back Subscription Management

Before: Supplier invoices linked to customer subscriptions were manually managed, creating costly operational inefficiencies.

After: LISA Enterprise automated supplier invoice tracking and revenue recognition, providing real-time profitability insights.

 **Impact:** 50% faster revenue recognition and improved financial reporting accuracy.

✅ Advanced Subscription Reporting & Analytics

Before: Subscription revenue, churn, and ARR tracking were manual, limiting financial visibility.

After: LISA Enterprise integrated with Power BI for real-time analytics, allowing finance teams to easily track key performance metrics and drive informed decisions.

 **Impact:** 3× acceleration in subscription growth handling with data-driven insights.

✔ Subscription Future Cancellation

Before: Cancellations had to be handled manually, increasing administrative workload.


After: LISA Enterprise introduced future cancellation functionality, allowing finance teams to schedule cancellations and automate credit note generation.

 **Impact:** Reduced manual workload and ensured accurate automated cancellations.

✔ Salesforce Integration

Before: Subscription sales workflows in Salesforce CPQ weren't linked to financial systems, requiring manual data entry.


After: LISA Enterprise's web services enabled seamless integration, ensuring synchronized subscription data across platforms.

 **Impact:** Improved overall operational efficiency by eliminating redundant data entry and significantly reducing errors.

✔ Flexible Pricing Models

Before: Limited pricing flexibility made it difficult to quickly and efficiently customize subscription plans for different customers' unique needs.

After: LISA Enterprise enabled tiered pricing, customer-specific pricing, and indexing for greater flexibility, accuracy, and streamlined revenue management.

 **Impact:** Increased pricing agility, allowing better adaptation to evolving customer needs, market trends, and competitive business conditions.

Conclusion

Tribal Group's adoption of LISA for Microsoft Dynamics 365 Finance has driven substantial operational improvements. By modernizing subscription management with automation, streamlined invoicing, and real-time analytics, the company has enhanced customer experience while improving financial control. LISA's flexibility, integration capabilities, and intelligent automation have positioned Tribal Group for sustained growth in the evolving subscription economy.



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