



## THE CUSTOMER

instream is a national provider of secure online dental exchange services and payment solutions. It provides a number of services on a subscription basis, including a dental payment solution, patient insurance claims service, 3D treatment models, and educational waiting room video content.



### INSTREAM'S STORY

instream is a B2B SaaS company that provides tools and services to the dental community and insurers. For almost a decade, instream's goal has been to eliminate inefficiencies of claims submissions and payments between dental offices and associated insurance companies.

When instream's customer base began to scale, its billing requirements grew exponentially. More and more time was consumed by manual billing and tracking. It's no surprise that its monthly invoicing alone took one dedicated resource a full week to complete. As a result, instream quickly recognized it needed to automate its recurring billing process so it could focus on other critical areas of the business.



### THE CHALLENGE

Over 90% of instream's services are subscription-based. instream registered new customers manually through forms that were faxed or scanned and then entered into their system. As demand increased, the registration, billing, and customer tracking became unmanageable, labor intensive, and process heavy – consuming too much valuable staff time.



### THE SOLUTION

With Stax Bill, instream has a self-service portal that enables customers to register online for their subscription services. Stax Bill automates and manages instream's billing, payment, and revenue recognition processes dynamically behind the scenes. Through Stax Bill, instream can also track customer data, helping its leadership better target the market – an activity they previously had to do manually.



### THE BENEFITS

instream's registration and billing processes and customer relationship management activities are now housed within one integrated system, making it more cost-efficient and user-friendly.

The tracking capability gives instream easy access to customer accounts and provides the intelligence it needs to manage customer lifecycles. Having insight into customer behavior enables the business to increase customer satisfaction and maximize revenue by identifying churn risks and mitigating late payments. This automation enables instream to accomplish their registration and invoicing in a fraction of the time, reducing their effort by 80%. An added benefit going forward is that its recurring billing requires little or no additional staffing as its customer base grows.



*"With [Stax Bill], we are 100% confident our billing is being optimized and managed by a financial system built specifically for rapid-growth subscription businesses like ours."*

**- Vincent Regnier,**

Founder, VP of Operations



*Vincent Regnier, Founder, VP of Operations*  
*"With [Stax Bill], we reduced our time spent on billing by 80%; it has helped maximize our revenue and increase our customer satisfaction."*

**- Joel Bisson,**

Founder, President & CEO

The automation of recurring billing is a business superpower. **Let's start your origin story.**