

Case Study

Powering the Transition from Perpetual Licensing to Subscription-Based Monetization

Financial Trading Platform

Company Overview

For more than four decades, this global financial technology provider has delivered secure, compliant connectivity and network services to market participants around the world. As a foundational partner to brokers, exchanges, and financial institutions, the company's solutions ensure mission-critical performance wherever and whenever trades are executed.

When it came time to evolve from a perpetual software licensing model to a subscription-based approach, the company required a monetization solution that could scale globally, support operational complexity, and ensure visibility and accuracy across the quote-to-cash process. They chose Gotransverse.

Business Challenge

Transitioning to a SaaS model introduced significant complexity across financial, operational, and technical dimensions:

- High barriers to entry under the legacy perpetual license model, along with cash flow volatility
- Bundled solutions including both hardware and software from multiple business units
- Operational reach across 32 countries, with region-specific tax, currency, and compliance considerations
- Disconnected systems unable to support evolving revenue schedules, product bundles, or custom recognition logic

The existing infrastructure lacked the ability to orchestrate modern subscription scenarios—particularly those that involved hardware and software sold together, or revenue recognition not directly tied to invoicing events. The company needed a system that could unify operations, scale across more than 20 multi-currency business units, and integrate seamlessly with Salesforce and CloudSense.

The Solution

Gotransverse was selected for its intelligent monetization capabilities, robust configurability, and ability to support advanced, enterprise-grade requirements. The deployment included:

- Custom bundles combining hardware, software, and services from multiple units
- Tailored discounting by business unit
- Accurate tax calculation by bundle component and jurisdiction
- Flexible revenue recognition, decoupled from invoice timing
- End-to-end quote-to-cash integration with Salesforce and CloudSense

With Gotransverse, the company launched a new product line designed to deliver subscription-based communication and collaboration for global financial markets—bringing scalability, automation, and visibility to a highly regulated environment.

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We operate in a highly regulated industry that requires the utmost degree of billing and revenue recognition accuracy. With Gotransverse, we're able to handle the complexity of selling cross-business-unit hardware and software bundles, subscriptions, custom discounts, billing and revenue recognition all with pinpoint accuracy. The functionality and configurability the Gotransverse solution offers is only surpassed by the outstanding partnership and service of their implementation team, which has been instrumental in guiding us through our transition to a subscription-based model and a unified quote-to-cash solution.”

Results

The impact of the transition has been transformative.

The company now benefits from:

- Stabilized revenue streams and improved forecasting
- Simplified onboarding of new customers and users
- Seamless bundling across software, hardware, and services
- Improved accuracy in invoicing and revenue recognition
- Increased agility to introduce new offerings and scale globally

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The move to subscription based billing and the visibility that we now have across the entire quote-to-cash system have been a game-changer for us, stabilizing our revenue streams for easier forecasting, and enabling us to more rapidly add new users as our business grows,” said a company executive. “We plan to move all products to our new, streamlined billing system, so we can eventually offer our customers improved service and satisfaction through usage-based billing.”

Why Gotransverse

Gotransverse was chosen not only for its functionality and global reach, but also for the quality of its team and implementation experience. The company leveraged Gotransverse in tandem with CloudSense to enhance CPQ operations, drive bundling efficiency, and automate complex pricing and revenue scenarios.

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Conclusion

By partnering with Gotransverse, this financial services provider successfully modernized its revenue operations—replacing legacy limitations with a scalable, automated, and globally compliant solution. Today, the company is better equipped to serve its global customer base, adapt to changing market demands, and monetize with precision and confidence.



**Launch Smarter
Monetization Today**

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About Gotransverse

Gotransverse delivers a fast, flexible billing and revenue management solution. Our intelligent cloud-based software was built by industry experts to handle the most complex pricing models. Since 2008, we've partnered with companies to streamline operations and unlock revenue potential, ensuring they can scale with confidence. From our headquarters in Austin, Texas, Gotransverse leads the way in enterprise monetization. To learn more, go to gotransverse.com.