

# Maxio: The Three-Pillar Platform That Turns Finance Teams Into Growth Engines

## A Thank You to Our Partners in Innovation

We're grateful to Maxio for participating in the Next Generation Solution Showcase on Billing and Revenue Management. This blog is written for CFOs of fast-growth companies who are building the foundation of their finance tech stack. Leaders who need crystal-clear visibility into cash flow, want data-driven investment strategies, and require accurate forecasting to guide their next phase of growth.

## "The Center of Your Financial Operations"

Maxio doesn't just describe what they do. They describe where they sit in your tech stack. As the connective tissue between your CRM and ERP, Maxio has spent over 15 years becoming the platform that recurring revenue companies rely on when their business gets complicated. With over 2,000 customers managing \$18 billion in annual billings, they've built a platform around three core pillars: billing, revenue recognition, and analytics.

## Who Maxio Serves Best

Maxio is purpose-built for companies navigating the complexity that comes with recurring revenue models. The ideal customer operates somewhere between startup and unicorn, doing anywhere from \$5 million to \$500 million in ARR. What matters is recurring revenue complexity that current systems can't handle.

You're dealing with hybrid billing models where some customers self-serve on your website while others negotiate enterprise contracts. Usage-based pricing layered on top of subscription fees. Multi-year contracts with performance obligations that don't map cleanly to what customers actually purchased.

You're probably on NetSuite, Sage, QuickBooks, or newer ERPs like Rillet. Your CRM is Salesforce or HubSpot. And the gap between those systems is killing your finance team's productivity.

Here's the profile that fits perfectly: you're serving institutional investors who demand bulletproof financials with stringent, varied reporting requirements. Your board wants ARR waterfalls, cohort analysis, net retention rates, and lifetime value calculations. Your ERP gives you GAAP financials. Your CRM gives you pipeline. But nobody's giving you the SaaS metrics that actually run your business.

## **What Makes Maxio Unique: The Ecosystem Player**

Most billing platforms pick a lane. They integrate with your CRM or your ERP, but rarely both seamlessly. Maxio positions itself as the ecosystem player that actually connects your entire financial operations stack.

You click on a customer record in Maxio and you see their Salesforce opportunity right there. Click again and you're viewing their invoice history in Rillet or NetSuite. Every logo in Maxio is a portal to the underlying system. No context switching, no hunting for information across three different tabs.

But here's what really matters. Maxio controls the synchronization. When you generate invoices for a multi-year contract, you can control whether those future-dated invoices sync to your ERP immediately or wait until they're actually billed. You can decide whether trial customers appear in QuickBooks or stay in Maxio until they convert.

The other differentiator? Depth of functionality specifically for B2B SaaS. Their Subscription Momentum Report alone has 217 different metrics across 16 tables. They handle hybrid billing, manage performance obligations separately from what customers purchase, and track committed ARR separately from recognized ARR.

This isn't a platform trying to serve every industry. It's a platform that obsesses over recurring revenue businesses.

## **The Capability That Changes Everything: AI-Powered Contract Intelligence**

Maxio has built a Model Context Protocol connector that lets AI agents interact directly with your financial data. Chris Weber, Maxio's Chief Product Officer, demonstrated it live using Claude. He uploaded a PDF contract from their CPQ system. The AI extracted every billing term: start and end dates, products, billing amounts, terms. Then, through the MCP connection, it created the customer record and subscription in Maxio automatically.

But here's the smart part. Instead of blindly trusting the AI, Maxio routes these AI-generated records through their Sales Order Queue. You can review and verify before anything goes live. Trust but verify.

The MCP opens up more possibilities. You can ask Claude to pull your Subscription Momentum Report, analyze your churn by customer segment, and identify whether you're losing five-star ideal customers or one-star poor fits. You can build automated agents using platforms like N8N that trigger on signed contracts, extract terms, and create billing records without human intervention.

What Maxio is doing here is making your financial data conversational. Instead of clicking through dashboards, you ask questions and the AI pulls the exact reports you need.

## **Customer Story: Sendspark's Path From Zero to Revenue**

### **The Situation**

Bethany Stachenfeld, CEO of Sendspark, faced a classic early-stage dilemma. Nine months into building her video platform for sales teams, she had a product people wanted. But she didn't have time to build a subscription billing system from scratch.

Without the ability to charge customers, there was no business. But diverting precious engineering resources to build billing infrastructure meant slower product development and potentially losing market momentum to competitors.

### **The Action**

Sendspark implemented Maxio Advanced Billing to handle their entire subscription management without writing a single line of billing code. The Maxio team worked directly with their development team on technical implementation.

Here's what made the difference. Maxio gave them flexibility to experiment before committing to a pricing model. Bethany could create different subscription plans, generate unique signup links, and test pricing with real customers before building anything into her product. She could see which price points were too high, which were too low, and which resonated.

They ultimately decided on per-user pricing, but only after testing extensively. It's a risky model because every additional seat becomes a purchase decision. Maxio let them validate the approach before locking it in.

### **The Results and Why They Matter**

Sendspark went from zero billing capability to immediate revenue generation. They avoided months of engineering work. The dunning features handled expired credit cards automatically, reducing churn from payment failures.

But the strategic impact ran deeper. Bethany could focus her entire team on building product features that differentiated Sendspark from competitors. Every hour not spent on billing was an hour spent making the core product better.

The pricing experimentation phase gave them confidence. When investors asked about their pricing strategy, Bethany could explain exactly why per-user pricing worked and show the testing that proved it.

And perhaps most importantly, Bethany eliminated a category of stress that kills founders. "With billing, you really notice when things don't work," she explained. "If things are going wrong, believe me, you notice and you hear from your customer." By using Maxio, billing just worked. Silently, reliably, in the background.

For a founder already juggling product development, fundraising, customer acquisition, and team building, removing one major source of operational risk was priceless.

## **The Bottom Line: Building on Proven Infrastructure**

For CFOs evaluating billing platforms, Maxio represents a different philosophy. This isn't the newest startup with the flashiest demo. This is the platform that's been doing this for 15 years, managing \$18 billion in annual billings, serving over 2,000 recurring revenue companies.

When institutional investors see that a portfolio company runs on Maxio, they inherently trust the numbers. That's the benefit of choosing proven infrastructure.

**Watch their full Next Generation Solution Showcase presentation** to see the platform in action and understand how they're thinking about AI-powered finance automation. Visit [maxio.com](https://maxio.com) to learn more.

Your finance team shouldn't be building bridges between disconnected systems. They should be greasing the skids for revenue growth.