

B2C Subscription Management Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***ISG** Research



B2C Subscription Management

The era of subscriptions has fundamentally changed how consumers access and interact with products and services. Instead of traditional ownership, people now expect flexible options such as subscriptions, pay-per-use or on-demand access, often in combination with physical goods enhanced by digital experiences. Shoppers increasingly prefer to buy on their own



Shoppers increasingly prefer to buy on their own terms—through digital storefronts, self-service apps or even voice and text—making convenience and choice central to engagement.

terms—through digital storefronts, self-service apps or even voice and text—making convenience and choice central to engagement. Compared with just five years ago, the way consumers discover, purchase and stay connected to brands looks dramatically different.

ISG defines subscription management for B2C as the end-to-end process of delivering a seamless subscriber experience from selection and configuration through billing, payment and fulfillment while enabling organizations to treat subscriptions as products with full lifecycle management. This includes automation, analytics, pricing, loyalty and system integration, as well as support for diverse monetization models such as flat-fee, usage-based, milestone and one-time sales. Effective applications must also manage complex payment flows, allocate revenue across partners and asset owners and ensure strong receivables, cash flow and collections capabilities.

Subscriptions are not new. Newspapers and magazines adopted the model decades ago, and Netflix first offered DVDs for a flat monthly fee. But the rise of digital products and services has accelerated mainstream adoption. From HBO and Spotify to fitness apps and streaming platforms, subscriptions are now a standard way for consumers to access content and services for a set period. This shift has made subscriptions widely accepted as a pricing model, giving people the ability to spread expenses over time while companies benefit from predictable, recurring revenue tied to ongoing usage.

Businesses built on or heavily reliant on B2C subscription models face the challenge of giving customers seamless, self-service options to start, manage or change their plans at scale. For those introducing subscriptions alongside traditional one-time purchases, the key is to integrate these models smoothly so that subscribers enjoy a consistent experience—avoiding problems such as duplicate charges, mismatched payment methods, or fragmented checkout journeys.

Effective subscription management systems must support a wide range of business models and use cases, either through built-in features or smooth integration with existing platforms. For enterprises that have traditionally relied on one-time purchases, adding subscription



options often requires new systems and processes that work alongside existing infrastructure without disrupting the customer experience. Whether the subscription platform serves as the central hub for billing or simply connects into legacy systems, interoperability is critical—especially in keeping customer and product data consistent and synchronized to ensure a seamless subscriber journey.

Unlike one-time purchases, which rarely change and typically rely on simple product lists, subscription and digital models require frequent updates to pricing, bundles and catalogs demanding, both flexibility and ease of use. Effective subscription management often goes beyond flat monthly fees to include usage- or consumption-based pricing, where costs reflect actual activity (such as streaming hours or in-app transactions) and better balance value between customer and provider. These models can include tiered pricing triggered by usage thresholds, as well as more dynamic approaches that factor in time, location, customer preferences or bundled product and service combinations.

By 2026, increased adoption of the subscription business model will lead to more complex pricing, rating and billing and, if not successfully addressed, will diminish the customer experience and restrict growth. Usage-based pricing can feel appealing to consumers, but often creates uncertainty, since charges vary and are difficult to predict in advance. Costs might come from things like mobile data usage, streaming hours, or in-app purchases, making

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Subscription pricing affects when and how revenue is recognized, since most of it is realized over time and only after meeting certain events like service delivery, payments or milestones.

monthly bills less transparent. Telecom providers illustrate this challenge: After years of itemizing every call or text, many shifted to unlimited or block plans to simplify billing. Unlike flat fees, usage-based models require smarter forecasting to help both companies and customers anticipate costs, avoid surprises and maintain trust. Yet many subscription systems still lack these capabilities.

Subscription pricing affects when and how revenue is recognized, since most of it is realized over time and only after meeting certain events like service delivery, payments or milestones. While accounting systems can track the financial side, subscription platforms are better suited to manage the events behind recognition. Advanced tools can automatically calculate adjustments from usage or activity, create detailed revenue entries and sync them with the main accounting system—ensuring accuracy and compliance while reducing manual effort.

For usage-based subscriptions, data mediation is often necessary because raw usage data can come from many different sources and formats. This process involves standardizing and combining the data for use with pricing. When volumes are high, companies may rely on pre-



aggregation or rolling pricing, with the option to reprice if usage crosses certain thresholds or tiers. In some cases, usage may even be pre-priced outside the system and passed through directly. These variations reflect the practical realities of managing subscriptions in real-world consumer scenarios.

An often-overlooked part of subscription management is properly accounting for revenue owed to partners providing add-on products or services within a bundled offer. Partnerships today go far beyond traditional reseller models, as businesses increasingly team up with others to create ecosystems that deliver more value without having to build everything themselves, shifting from “build or buy” to “build, buy or partner.” This creates accounting challenges, such as calculating commissions, applying markups or splitting bundle costs across multiple parties. Real-world examples include gyms pairing memberships with nutrition services, rental companies leasing fleets or travel platforms sharing revenue with airlines and hotels. As these ecosystems expand, businesses need more advanced systems that can handle complex revenue-sharing tied directly to the subscription pricing models offered to customers.

To improve efficiency and gain clearer insights into profitability, revenue allocations to partners should mirror the payments received, with contracts detailing not only the product

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Today's subscription management systems need to integrate seamlessly with customer, product, pricing and partner data.

or service terms but also any revenue-sharing or royalty obligations. Strong contract management is, therefore, essential in subscription models, ensuring that changes to orders, plans or terms are handled smoothly with accurate proration, adjustments or refunds.

Today's subscription management systems need to integrate seamlessly with customer, product, pricing and partner data so updates to contracts or orders flow directly into billing, payments, receivables and accounting for accurate revenue recognition. Intelligent automation and proactive alerts play a key role in reducing manual work, quickly resolving issues, and delivering subscribers a smooth, hassle-free experience.

While automation is the goal, reporting remains vital for both auditing and insight. Reporting generally falls into two categories: operational and analytical. Operational reporting provides detailed, transaction-level data for validation and audit, usually pulled directly from stored records with minimal filtering and delivered in formats like CSV or print. Analytical reporting, on the other hand, aggregates and filters data to highlight trends in customer behavior and performance, often presented through dashboards, interactive tables, or integrations with BI tools and data warehouses.



Subscription management platforms are increasingly incorporating artificial intelligence (AI)-driven analytics and predictive tools, such as suggesting collection strategies for overdue accounts or spotting passive churn from expired cards and invalid addresses. While adoption of advanced features like pricing optimization and bundle recommendations has been slower, many providers see growing demand as traditional businesses add subscriptions to complement one-time sales and digital-first companies expand into physical offerings.

Enterprises need subscription platforms that work for today while scaling for tomorrow. The best applications use AI to improve operations and customer experiences—like smarter payment strategies, churn prediction and productivity tools—while integrating seamlessly with existing systems for smooth billing, orders and payments. They should also support partner ecosystems and new product models without workarounds, making it easy to test, adjust and grow offerings. Ultimately, the right platform helps businesses meet customer expectations, stay compliant and drive long-term profitability.

The ISG Buyers Guide™ for B2C Subscription Management evaluates software providers and products in key areas as part of the capability model. including:

- The Subscriber Experience
- Managing Subscriptions
- Loyalty and Rebates
- Data Mediation
- Pricing and Rating Methods
- Payments In—Billing
- Payment Accepting Systems
- Contract/Order Management and Adjustment
- Dunning and Collections
- Revenue Recognition
- Automation and Error Handling
- Operational Reporting
- Analytical Reporting

This research evaluates the following 24 software providers that offer products to address key elements of B2C subscription management as we define it: AdvantageCS, Aria Systems, BillingPlatform, Chargebee, Cleverbridge, FastSpring, Gotransverse, keylight, LogiSense, Maxio, NetSuite, OneBill, Oracle, Paddle, PayPro Global, Recurly, Sage, Salesforce, SAP, Stripe, Verifone, Younium, Zoho and Zuora.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for B2C Subscription Management is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for B2C subscription management software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for B2C subscription management to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of B2C subscription management technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and



deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of B2C subscription management software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating B2C subscription management systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



Key Takeaways

B2C subscription management is evolving rapidly as consumers shift to digital-first, usage-based and ecosystem-driven models. Effective platforms must unify pricing, billing, contract management and revenue recognition while handling complex partner allocations and usage data. AI and automation are essential to streamline forecasting, invoicing and collections, while predictive analytics reduce churn and improve subscriber engagement. Integrated applications provide the ability to support diverse business models and drive sustainable growth.

Software Provider Summary

The research identifies Zuora, Oracle and BillingPlatform as overall leaders, with Zuora topping the rankings across multiple categories. Classification places Aria Systems, BillingPlatform, Chargebee, Gotransverse, NetSuite, Oracle, Salesforce, Stripe, Zoho and Zuora in the Exemplary quadrant. AdvantageCS, keylight and SAP are categorized as Innovative. OneBill and Recurly are rated Assurance, with Cleverbridge, FastSpring, LogiSense, Maxio, Paddle, PayPro Global, Sage, Verifone and Younium in Merit. The research assesses the balance of product and customer experience.

Product Experience Insights

Product Experience represented 80% of the overall evaluation, weighted across Capability (30%), Usability (12.5%), Reliability (12.5%), Adaptability (12.5%) and Manageability (12.5%). Zuora, Oracle and BillingPlatform led overall; Oracle, Salesforce and Zuora excelled in Adaptability; Salesforce, BillingPlatform and Zuora in Usability; Zuora, BillingPlatform and Oracle in Reliability; and Zuora, Oracle and keylight in Manageability. Leaders distinguished themselves through breadth of B2C subscription capabilities, scalability, integration depth and configurability, offering technology best suited for enterprises seeking robust, flexible platforms.

Customer Experience Value

Customer Experience accounted for 20% of the overall evaluation, focused on Validation (10%) and TCO/ROI (10%). Zuora, Oracle and Gotransverse ranked highest overall for customer experience by demonstrating strong commitment, validated references and lifecycle support. In TCO/ROI, Zuora, BillingPlatform and Oracle performed best, showcasing clear ROI tooling and business-case transparency. Providers that fell short often lacked sufficient references, communication or ROI frameworks, which may limit enterprise confidence.

Strategic Recommendations

Enterprises should treat subscription management selection as a strategic investment that balances deep product capability with proven customer experience. Buyers should prioritize platforms that unify pricing, billing, contracts, and revenue recognition while supporting partner allocations and compliance. Providers with transparent ROI and strong validation offer greater confidence for long-term success. Using this research framework, enterprises can align software provider selection with operational needs and financial accountability, ensuring subscription management investments that drive growth and resilience.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Zuora atop the list, followed by Oracle and BillingPlatform. Providers that place in the top three of a category earn the designation of Leader. Zuora has done so in seven categories, Oracle in six, BillingPlatform in four, Salesforce in two and keylight, Gotransverse in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

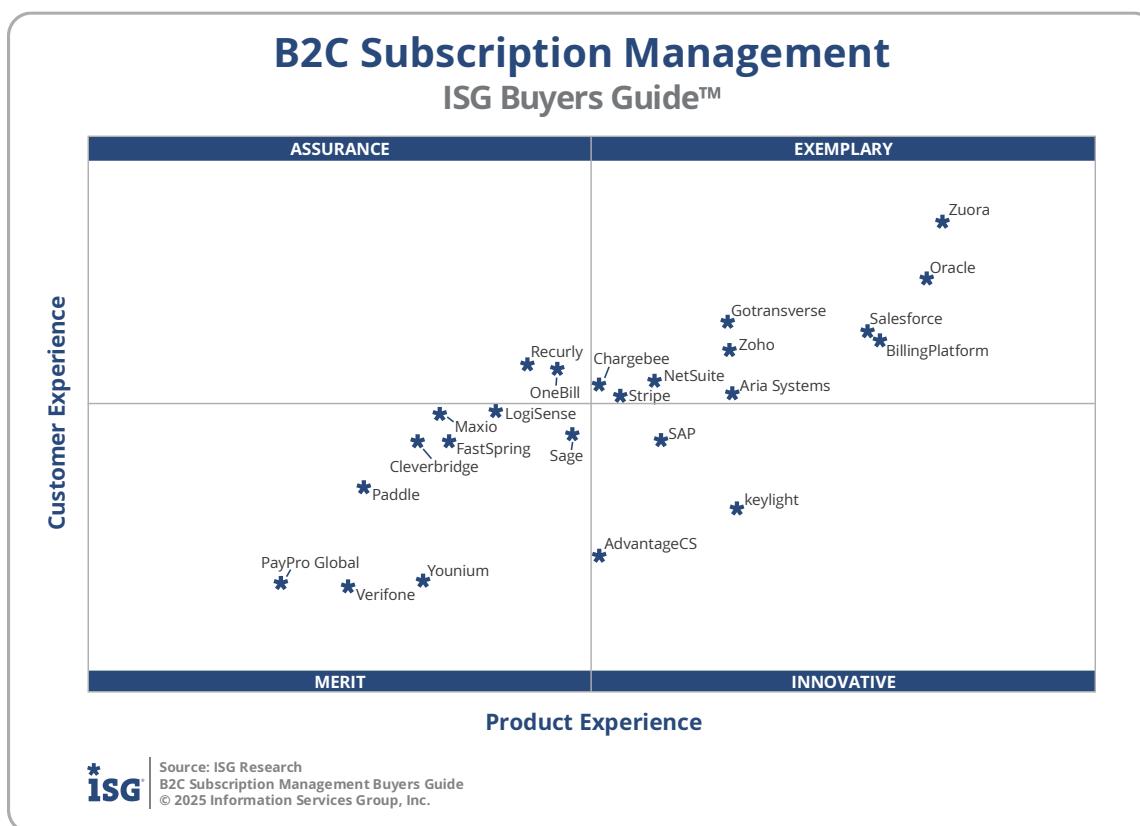
The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

B2C Subscription Management Overall

Providers	Grade	Performance
Zuora	A-	Leader 86.7%
Oracle	A-	Leader 84.2%
BillingPlatform	B++	Leader 80.4%
Salesforce	B++	79.8%
Gotransverse	B+	73.8%
Zoho	B+	73.0%
Aria Systems	B+	72.0%
keylight	B+	69.0%
NetSuite	B	68.8%
SAP	B	67.1%
Stripe	B	66.2%
Chargebee	B	65.8%
OneBill	B	64.9%
Recurly	B	63.8%
Sage	B	63.6%
LogiSense	B-	60.9%
AdvantageCS	B-	60.9%
Maxio	B-	58.1%
FastSpring	B-	57.7%
Cleverbridge	B-	56.6%
Younium	C++	52.2%
Paddle	C++	51.9%
Verifone	C+	49.0%
PayPro Global	C+	45.7%



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Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Aria Systems, BillingPlatform, Chargebee, Gotransverse, NetSuite, Oracle, Salesforce, Stripe, Zoho and Zuora.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: AdvantageCS, keylight and SAP.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: OneBill and Recurly.

Merit: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are:



Cleverbridge, FastSpring, LogiSense, Maxio, PayPro Global, Paddle, Sage, Verifone and Younium.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle B2C subscription management, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (12.5%), Capability (30%), Reliability (12.5%), Adaptability (12.5%) and Manageability (12.5%). This weighting impacted the resulting overall ratings in this research. Zuora, Oracle and BillingPlatform were designated Product Experience Leaders.

B2C Subscription Management Product Experience

Providers	Grade	Performance
Zuora	A-	Leader 68.3%
Oracle	A-	Leader 67.6%
BillingPlatform	A-	Leader 65.3%
Salesforce	B++	64.8%
keylight	B+	58.6%
Aria Systems	B+	58.4%
Zoho	B+	58.2%
Gotransverse	B+	58.1%
SAP	B	55.0%
NetSuite	B	54.6%
Stripe	B	53.0%
Chargebee	B	51.8%
AdvantageCS	B	51.8%
Sage	B	50.7%
OneBill	B	50.0%
Recurly	B-	48.7%
LogiSense	B-	47.1%
FastSpring	C++	45.0%
Maxio	C++	44.4%
Younium	C++	43.7%
Cleverbridge	C++	43.4%
Paddle	C++	40.9%
Verifone	C++	40.1%
PayPro Global	C+	36.9%



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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Zuora, Oracle and Gotransverse. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

B2C Subscription Management Customer Experience

Providers	Grade	Performance
Zuora	A	Leader 18.2%
Oracle	A-	Leader 16.8%
Gotransverse	B++	Leader 15.7%
Salesforce	B++	15.4%
BillingPlatform	B++	15.3%
Zoho	B+	15.0%
Recurly	B+	14.6%
OneBill	B+	14.4%
NetSuite	B+	14.2%
Chargebee	B+	14.1%
Aria Systems	B+	13.8%
Stripe	B	13.7%
LogiSense	B	13.5%
Maxio	B	13.3%
Sage	B	13.0%
Cleverbridge	B	12.8%
FastSpring	B	12.8%
SAP	B	12.7%
Paddle	B-	11.5%
keylight	C++	11.0%
AdvantageCS	C+	9.8%
Younium	C+	9.2%
PayPro Global	C+	9.1%
Verifone	C+	9.0%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for B2C Subscription Management in 2025, a software provider must be in good standing financially and ethically, have at least \$15 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 20 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

For the B2C Subscription Management Guide, providers should:

- Offer self-service options with free trial and freemium support
- Accept payment at the POS
- Have extensive dunning support.
- Offer revenue recognition capabilities
- Be scalable on the number of subscribers
- Provide analytics and operational reporting

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers, whether they choose to participate or not.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant B2C subscription management products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
AdvantageCS	Advantage	N/A	August 2025
Aria Systems	Aria Billing	65	July 2025
BillingPlatform	Billing	2025.07	July 2025
Chargebee	Subscription Management	N/A	August 2025
Cleverbridge	Subscription Management	N/A	August 2025
FastSpring	Subscription management + Billing	N/A	June 2025
Gotransverse	Billing and Invoicing	N/A	July 2025
keylight	keylight platform	13.7	July 2025
LogiSense	Subscriptions and Recurring Billing	10.8.4	August 2025
Maxio	Subscription Management	N/A	August 2025
NetSuite	NetSuite SuiteBilling	2025.1	June 2025
OneBill	Billing360™	N/A	August 2025
Oracle	Oracle Subscription Management	25C	July 2025
Paddle	Billing	N/A	June 2025
PayPro Global	Subscription Management	N/A	July 2025
Recurly	Subscription, Commerce, Engage and RevRec	N/A	April 2025
Sage	Sage Intacct	2025 R2	May 2025
Salesforce	Revenue Cloud Billing	Summer '25	June 2025
SAP	SAP Subscription Billing	N/A	July 2025



Stripe	Billing	2025-06-30.basil	August 2025
Verifone	2Checkout Monetization Platform	N/A	July 2025
Younium	Subscription Management	N/A	July 2025
Zoho	Zoho One Zoho Billing	N/A	August 2025
Zuora	Zuora	2025.Q3	August 2025



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Capability	Annual Revenue >\$15 million	Operates across 2 continents	At least 20 customers
Billsby	Billsby Subscription Billing Platform	Yes	No	No	No
Cratejoy	Cratejoy Subscription Box Platform	No	Yes	No	No
Kibo	Kibo Subscription Commerce	No	Yes	Yes	Yes
Loop	Loop Subscriptions	No	Yes	No	Yes
Ordergroove	Ordergroove Relationship Commerce Platform	No	Yes	No	Yes
Stax Bill	Stax Bill	No	No	No	Yes
Sticky.io	Sticky.io Subscription Commerce Platform	No	Yes	No	Yes
SubscriptionFlow	SubscriptionFlow Subscription Management and Billing	Yes	No	Yes	Yes



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

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ISG (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.