CUSTOMER CASE STUDY

From Reactive Reconciliation to **Finance-Led Governance**

How TSG manages 15,000+ subscriptions across 125 vendors - with a leaner finance team than when it started.

15,000+	125	-4
SUBSCRIPTIONS	VENDORS	FINANCE OPS ROLES

work 365

ABOUT TSG

A UK managed services provider built to scale

Technology Services Group (TSG) is a leading UK-based managed IT services provider and Microsoft Solutions Partner. With thousands of clients and tens of thousands of subscriptions - TSG has deep expertise across cloud, cybersecurity, managed infrastructure, and Microsoft licensing, TSG delivers scalable, recurring technology services that enable organisations to modernise and grow with confidence.

Founded 2003 | Employees 200+ | Microsoft Solutions Partner

Core systems

- **Dynamics 365** – CRM & Projects
- **Work 365** – Subscription & billing governance
- **Business Central** – Finance & ledger
- **Halo** – Support & ticketing
- **Distributers** –TD SYNNEX, Pax8



THE CHALLENGE

Growth, volatility, and operational pressure

TSG's growth, driven by acquisitions and organic expansion, rapidly scaled its subscription portfolio.
At the point TSG migrated to Work 365, TSG was already managing:

~11,000	~800	125
subscriptions	clients	providers / vendors

Microsoft's commercial model added constant movement

- Biannual pricing changes
- Renewal-based cost adjustments
- Distributor-specific pricing files
- Differences between supplier billing and customer invoicing cycles

Manual governance.

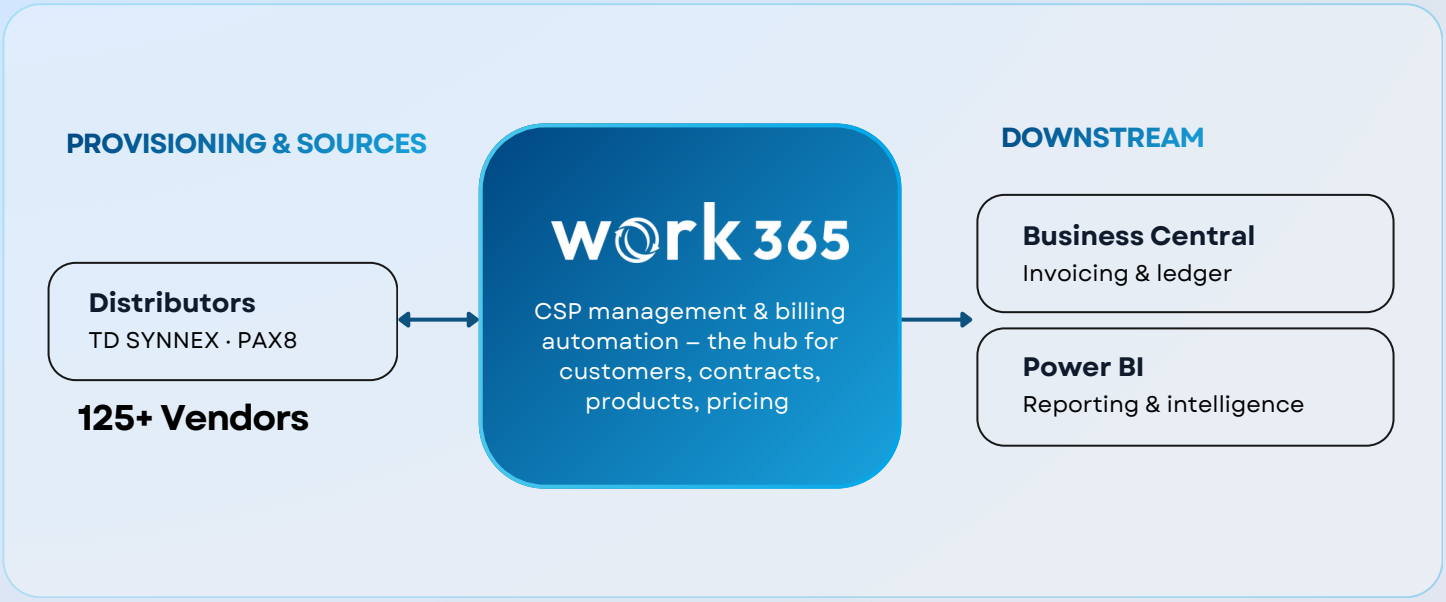
Before Work 365, reconciliation was spreadsheet-driven – roughly four weeks of full-time work for seven to eight people each month, plus a separate team for renewals and price changes.

> ***All of the processes that we had at that point were manual. Accuracy was a challenge with all manual processes.***
>
> **– PAULA McTEER, HEAD OF FINANCE OPERATIONS, TSG**

THE TURNING POINT

Work 365 becomes the subscription governance layer

Work 365 became the structured layer within TSG's Microsoft-centric ecosystem. Subscriptions flow from sales orders into Work 365, with invoicing synchronised into Business Central for downstream financial processing – standardised regardless of who the supplier is



> ***Work 365 brings standardisation irrespective of who the supplier is.***
>
> **– PAULA McTEER, HEAD OF FINANCE OPERATIONS, TSG**

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SALES & ORDER

Quote created
Proposify / Halo

Sales order in D365
Opportunity updated

Subscriptiopns + Services

PROVISIONING

Vendors

Purchasing
Licenses ordered

Subscription
Created in Work 365

Project in BC
Professional svc

Supplier sync
TD Synnex/ PAX8 <-> Work 365

BILLING

Invoice generated
Work 365 bill run

Renewal pricing

Microsoft price changes

Invoice sent to client
Imported into BC

Self-service portal
Client license changes

RECONCILIATION

Supplier invoice
Received ~10th of month

Cost reconciliation
Spreadsheet → Power BI

FINANCE

BC: payment ledger
Credit control / cash

Reporting & dashboards
Power BI / Work 365

Commercial & ops
Account visibility

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THE BUSINESS IMPACT

Scaling CSP operations with confidence

Nearly **double** the clients.
36% more subscriptions.
Four fewer people in finance operations.

↑15,000+
Subscriptions
(up from ~11,000)

↑~1,400
Clients
(up from ~800)

125
Vendors managed

↓4
finance operations role

> ***Look after the pennies, and the pounds look after themselves.***

– PAULA McTEER, HEAD OF FINANCE OPERATIONS, TSG

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BEFORE & AFTER

From manual oversight to a controlled process

BEFORE WORK 365

- Pricing and promo updates required manual intervention
- High effort to validate cost, quantity, SKU and term alignment
- Manual oversight to maintain confidence in margin accuracy
- Spreadsheet-driven reconciliation and manual variance investigation

AFTER WORK 365

- Subscription governance standardised across 125 vendors
- Real-time CSP synchronisation and structured renewal handling
- Subscription-level traceability improves control and explainability
- Finance confidence improves as billing becomes a controlled process

> ***Watertight Billing! That nervousness around revenue leakage has gone away.***
>
> **– PAULA McTEER, HEAD OF FINANCE OPERATIONS, TSG**

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WHAT'S NEXT

Expanding automation across the revenue lifecycle



Professional services billing automation
Extending Work 365 into services billing – integrating project-based workflows to remove manual spreadsheet manipulation. A stated FY27 objective.



Native Business Central integration
Replacing the bespoke invoice import routine with automated integration to improve timeliness and reduce manual intervention.



Advanced reconciliation intelligence
Power BI-driven logic to further reduce manual reconciliation, producing exception-based workflows across suppliers.

Work 365 is evolving from subscription billing platform to core revenue operations infrastructure.

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THE STRATEGIC OUTCOME

TSG did not just automate billing.

They built a finance-led operating model for subscription revenue

- Finance-led subscription governance
- Margin protection under pricing volatility and cross-system revenue alignment
- Scalable operations without linear headcount growth

> ***We couldn't realistically consider scalability without a solution like this.***
>
> **– PAULA McTEER, HEAD OF FINANCE OPERATIONS, TSG**

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