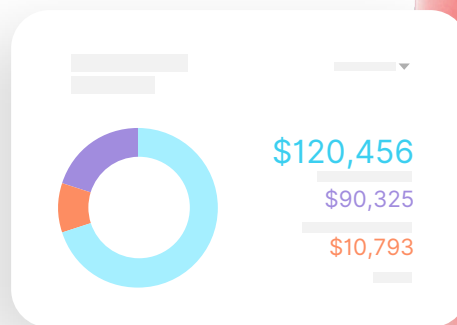
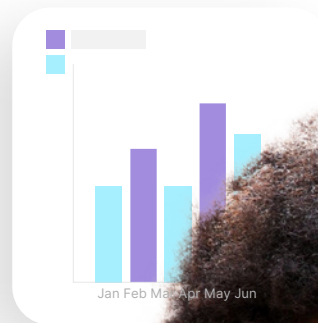


EMBEDDED PAYMENTS IMPLEMENTATION GUIDE

# What to expect during implementation

Your playbook for embedding payments into your platform



# An inside look

**What you can expect during implementation, and how the process was expertly designed to help software companies gear up for payments success.**

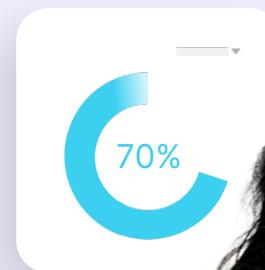
As a successful software provider and technology company, you know the importance of onboarding and the impact it can have on customer churn, satisfaction, and loyalty.

It should then come as no surprise that achieving sustainable growth and success with payments also begins with a frictionless implementation.

We've made it our mission to provide software companies, like yours, with a digital implementation

experience that mirrors the quality of our embedded payments — trouble-free, transparent, and tailored. That's also what you can expect from your Worldpay for Platforms partnership.

Our implementation framework ensures visibility into and throughout your personalised, digital experience, so your company can realise the true value of software-led payments, on your timeline.



**Allow us to show you how we help software companies embed payments so they can begin onboarding their merchant customers and launch with ease and confidence.**

This guide will walk you through every part of the implementation process, so you know exactly what to expect at this critical milestone in your payments journey.

**Get an inside look at how software companies can:**

Collaborate with their dedicated Worldpay for Platforms implementation team in one, central platform.

Experience a transparent, human-centered implementation framework that was expertly designed to get SaaS companies started with payments swiftly.

Ditch the DIY documentation approach and move ahead with immediate assurance of their technology investment.

Leverage your strategic payments partnership to the fullest, to scale, grow, and “wow” customers.

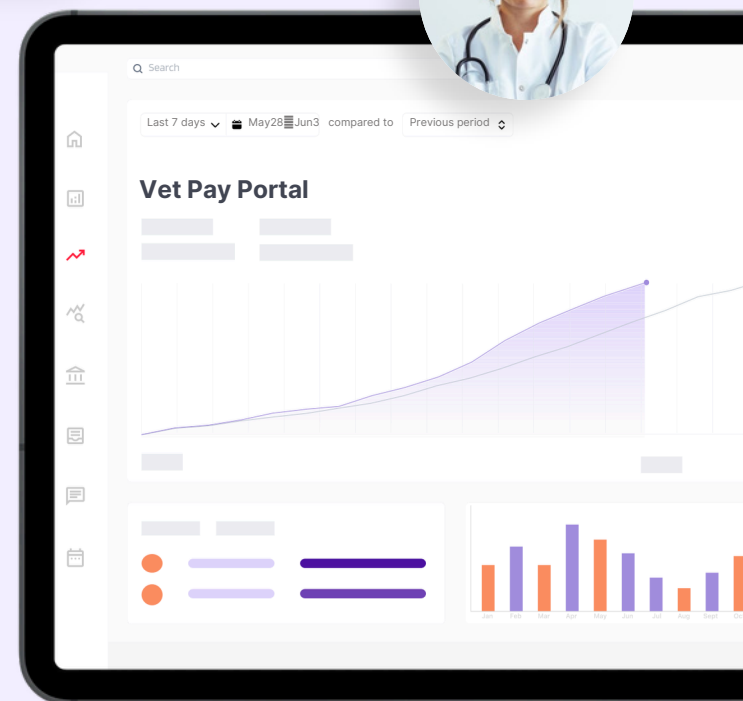
**At the conclusion of this guide, you'll have a clearer sense of what a embedded payments implementation looks like, so you can hit the ground running and achieve your business goals.**

# Understanding the embedded payment model

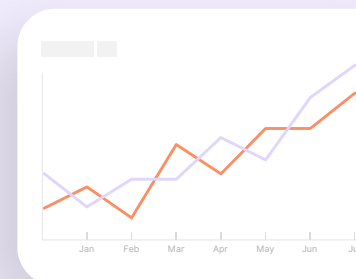
One of the biggest pieces of advice we have for software companies looking to scale and grow their business, and enhance the customer experience, is to make sure they understand the payments model at the onset of implementation.

Understanding this unique payment solution will ensure you recognise the true value and power of your investment along with the nuances, so you can properly articulate your offering to your merchant customers when the time is right.

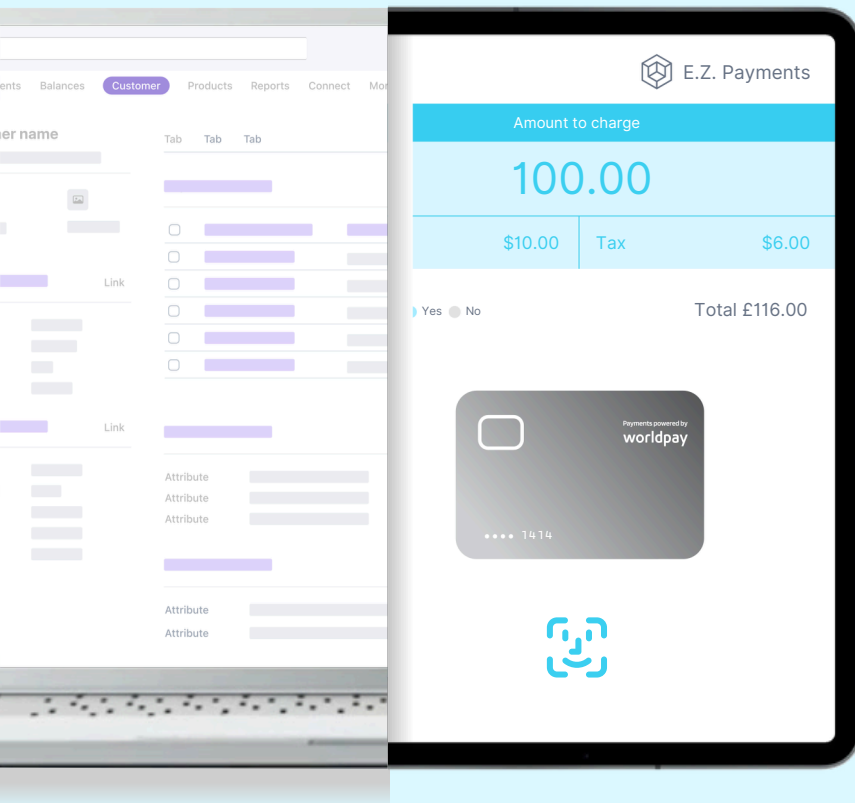
As your partner, you can count on us to not only provide you with a secure payments infrastructure but also educate you on how we can help you meet your business goals and answer any questions you may have along the way.



Create ▾







# What is payment facilitation-as-a-service?

**As a quick recap, payment facilitation-as-a-service or PayFac-as-a-Service offers software companies full control of the payments experience, while offloading many of the responsibilities to Worldpay for Platforms, your payments partner.**

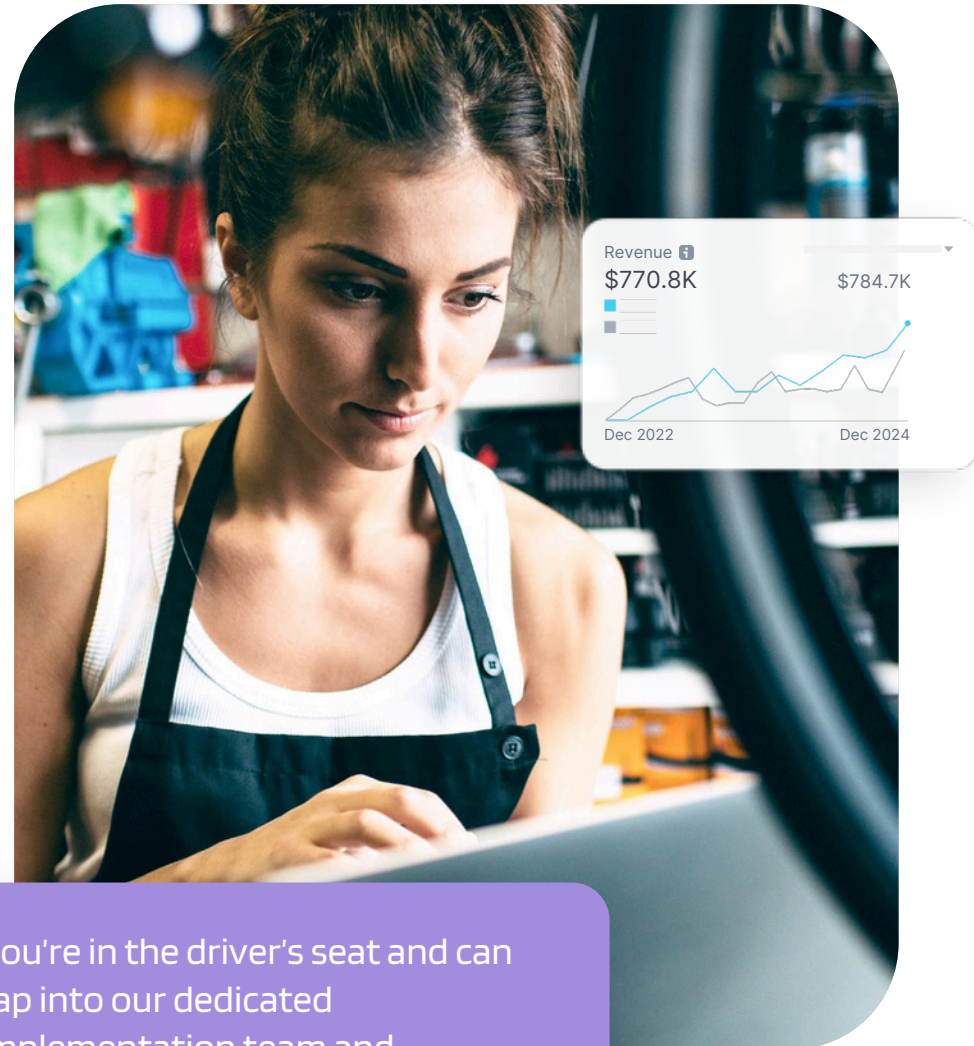
Worldpay for Platforms provides the infrastructure you need to offer payments to your software users as a white-labeled solution.

To your customers, the payments experience is undetectable, as it's fully integrated with your software platform and your brand's look and feel. It appears as though your platform is processing payments, but behind the scenes, Worldpay for Platforms is managing the risk, compliance, operational costs, and other payments complexities, so you can stay focused on what you do best — growing your business and delighting your customers.



## Our embedded payments model offers software companies:

- Control over the payments experience
- A white-labeled payments solution for consistency and continuity
- Seamless integration into your software
- Fast and efficient merchant onboarding
- Decreased time to market
- More revenue from customisable processing pricing
- Our secure approach to payments limits your risk, fraud exposure, and ensures compliance.



You're in the driver's seat and can tap into our dedicated implementation team and payments experts to help answer critical questions, setting you up for long-term success.

# Learn why Perfect Gym chose us as **their** **payments** **partner**

[Read success story](#)



Many vendors in the market didn't offer payments via SMS or online and other important capabilities right out-of-the-box. I also found other vendors didn't provide a good single point of contact. They would have multiple different people reach out with no real knowledge of what Perfect Gym did or how they could help us.

There were a few things that I knew that I had to have. One was the technology had to stack up. Another was that the support also had to stack up, along with the treatment of customer data and the way in which the third-party would treat our customers.

It had to be as good as how I wanted to treat our customers. Worldpay for Platforms was the only payments provider that ticked all the boxes. It's a company that thinks the same way about how we can do business in the industry. And they back it up with technology and proof of execution



Country Manager  
Perfect Gym

# What to expect from your payments implementation

Our goal is to help your software company win with payments. And there is nothing more critical than a transparent, flexible, and guided implementation process. We love to meet partners where they are at.

So, whether you're ready to do a **full API integration**, **portal integration**, or take a **hybrid approach**, we have options for every appetite and go-to-market timeline.

We take a strategic and digital approach to implementation to ensure that your payments vision becomes a reality, so you can meet and exceed your business goals. The digital nature of our implementation framework offers intuitive, self-service accessibility of the platform with experts guiding you along the way, rather than a DIY, documentation-driven experience.





## An overview of the implementation process with Worldpay for Platforms:

1. A kick-off meeting with your implementation team
2. Direct access to a dedicated implementation manager that knows your team, your timeline, and your goals, inside and out
3. A tailored implementation plan that offers the control to fast-track or slow things down, without sacrificing customer experience
4. White-glove service and real-time access to industry experts to answer all your payments questions
5. A digital implementation experience that details every step of the process, creates easy, two-way communication with your implementation team, and provides transparency and visibility for all project stakeholders
6. Access to out-of-the-box payment solutions and a library of tools to help you support and onboard your merchant customers with ease
7. Best practice tips to ensure a smooth implementation and maximum time to value



Our partners really value having a true expert by their side, someone who understands platforms and helps shape exactly what they need. They don't have to figure it all out upfront.

We provide a clear roadmap so when they're ready to implement or go to market, they're set up for success. And our support never stops there, we continue to strengthen the alliance and add ongoing value through optimisation, insights, and collaboration that help our partners grow and evolve."

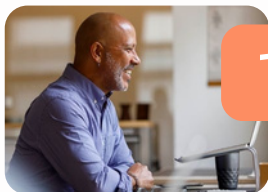


Jason McClintock,  
VP Sales and Partnerships, ANZ  
Worldpay for Platforms

# An inside look at an implementation kick-off call

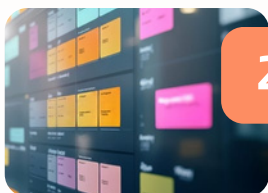
Here is a glimpse of what you can expect to discuss during your very first call with your implementation team.

Every step was carefully considered to build a strong foundation for success, without overwhelming you and your team.



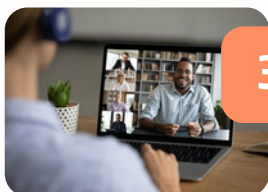
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**Meet your payments team**



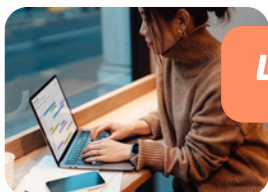
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**Discuss applications and implementation**



3

**Understand your support team's capacity and capabilities**



4

**Kick-off the digital implementation process**



## STEP ONE

# Meet your payments team

**During the first implementation call, our team will introduce themselves and get to know your organisation better.**

We also like to discover your comfortability with and knowledge of payments. We encourage you to be honest and feel free to raise your hand if you have questions about your service. There is no expectation that you're an expert when it comes to payments, even if you've handled them in the past. And if you are a payments expert, we're excited to talk shop.



## STEP ONE

We work with software companies with a wide range of payments comprehension. This level-setting conversation allows your dedicated team to devise a plan that is tailored to your needs and if necessary, fill any educational gaps with easy-to-understand resources and hands-on support.

You can expect us to cover topics such as:

- How you're processing payments today
- What's driving your business to embed payments
- Your business goals and expectations
- Business operations and staff to support payments
- Any payments questions you may have



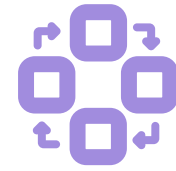
## STEP TWO

# Discuss applications and implementation

**Next, we'll want to understand your current applications.**

This allows us to “get under the hood” and decide what implementation process may make the most sense for your organisation.

We offer a range of options from hosted payment pages to full API integrations. Our team will pair you with an implementation that is right for you.





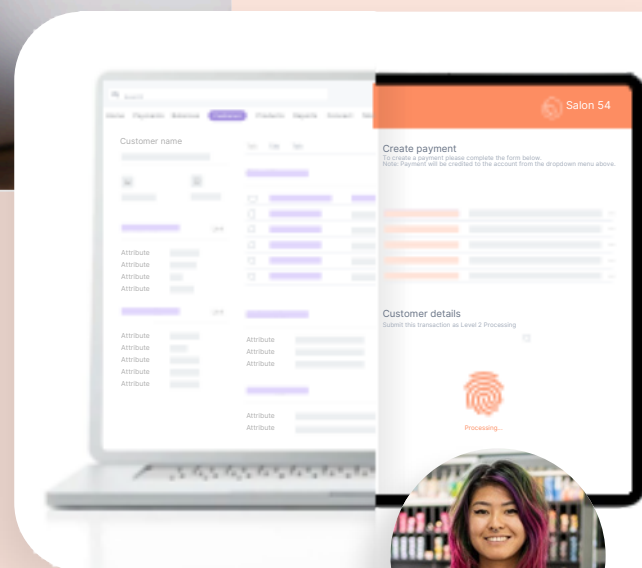
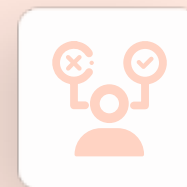
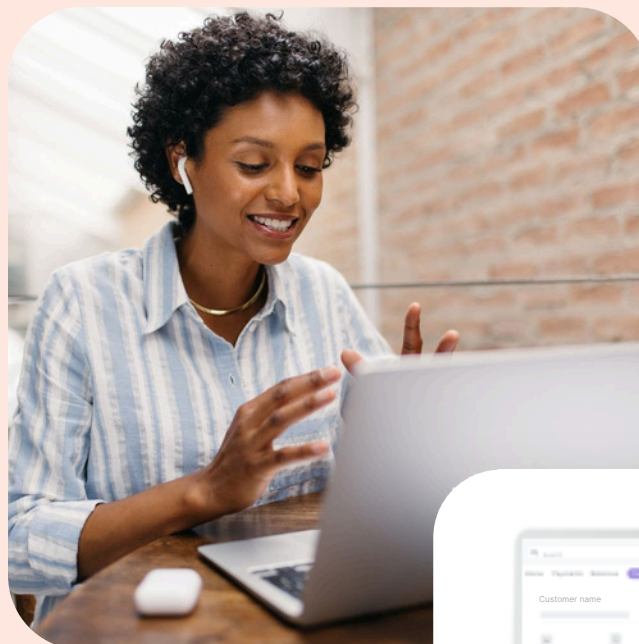
### STEP THREE

## Understand your support team's capacity and capabilities

**Success requires a team to adequately support the sales and servicing of your payments offering to customers.**

At a minimum, we encourage SaaS companies to dedicate three support people across your technical, customer experience, and merchant acquisition teams.

This approach, coupled with our training materials, resources, and white-glove support, will ensure successful integration and merchant adoption.



## STEP FOUR

# Kick-off the digital implementation process

Our digital implementation process is streamlined through our partnership with Rocketlane and their sophisticated delivery software. In the next section of this guide, we'll provide a sneak peek.

The last part of our kick-off call is all about starting to pull together your tailored project plan. Your personalised plan considers your payments knowledge, how your payments offering will be supported and managed internally, your goals, and the specific implementation process that works for you.

We will schedule regular calls to ensure our teams remain aligned and that your implementation is successful.

At the conclusion of the meeting, your dedicated team will have everything they need to schedule and begin your integration build (if applicable) and tailored implementation process.

For a closer look at what to expect from your first call with the our team, check out this blog.

[Learn more](#)





# Streamlining implementation with a digital approach

Our implementation is powered by Rocketlane, a cutting-edge project management tool that provides a shared space for partners to collaborate, track progress, and achieve project goals.

Designing an implementation experience that offers our partners a digital experience in a user-friendly environment was paramount, as we knew it would drastically help streamline the process and make implementation accessible to everyone involved.



## Here's what you can expect from our digital approach:



### **Streamlined onboarding experience**

With an intuitive, all-in-one platform, implementation is simple, automated, and user-friendly. All project stakeholders can see how implementation is progressing from a single interface.



### **Transparent tasks and real-time tracking**

Our implementation is an expert-guided, digital experience. Via Rocketlane we outline every step of the process, so you know exactly what deliverable stage you are at, and what to expect along the way.



### **White-glove service and support**

At your side throughout your entire payments journey, our accessible implementation team will ensure you get the most out of your Worldpay for Platforms partnership. We eliminate the guesswork and confusion that's often associated with traditional onboarding.



### **Expedited time to launch**

By removing the obstacles of project management, you can expedite your time to launch and reap the benefits of our payments as soon as you're ready.

# A glimpse at Rocketlane

## Project dashboard

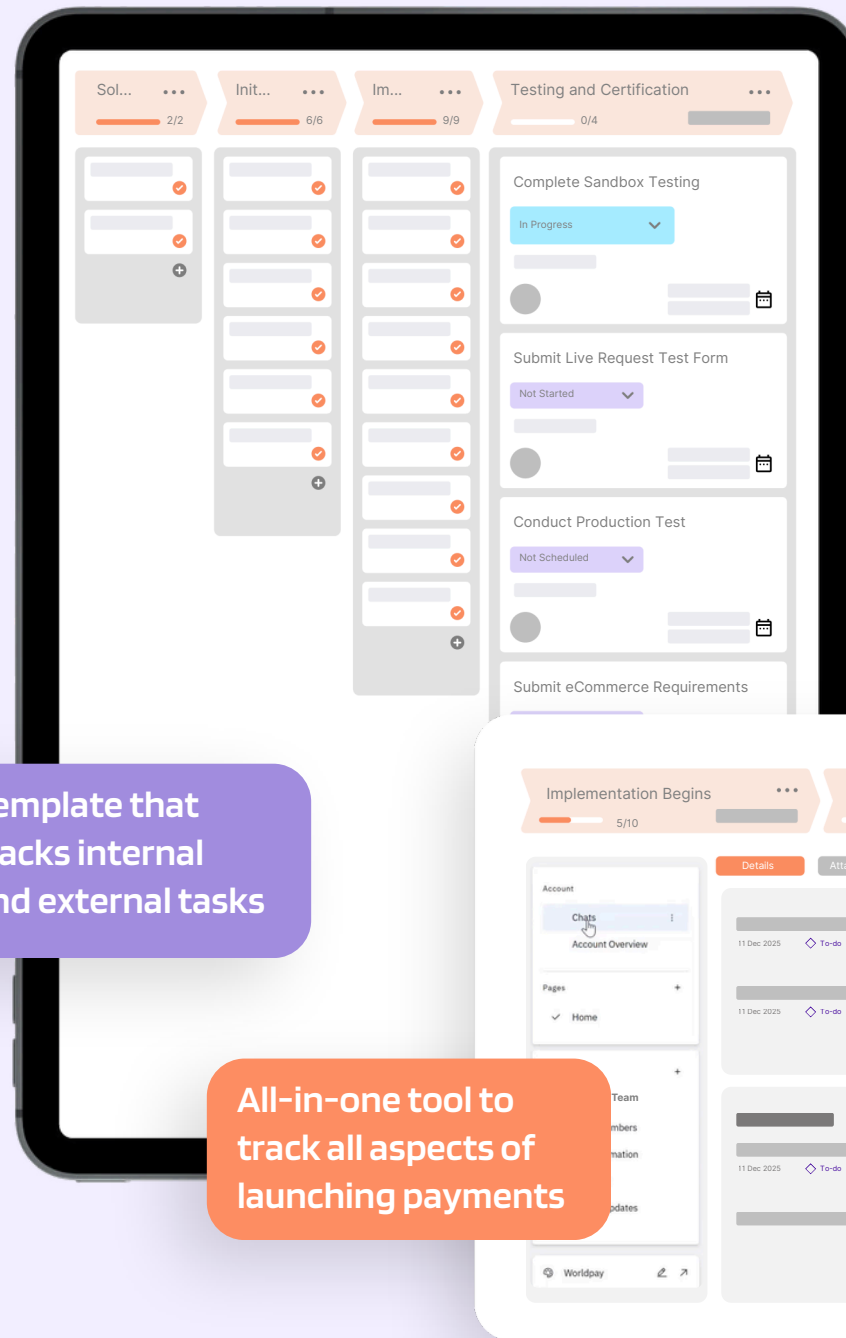
The project dashboard tracks internal and external tasks sequentially for efficient project management.

## Project timeline and task view

The project timeline clearly outlines the implementation process from beginning to end. Partners enjoy the ability to see all aspects of launching payments from a single tool with easy-to-follow links and checklists, milestone tracking, and detailed views of required tasks your software company needs to complete.

Template that tracks internal and external tasks

All-in-one tool to track all aspects of launching payments





# We will help you **implement payments with confidence and clarity**

We're invested in you and your success, which is why we're committed to providing our partners with a transparent and streamlined implementation experience.

As your strategic business partner, we're more than our technology. We want to support your unique payments journey in every way you need us to, whether that's optimising your payments strategy, helping you mature your payments model, or providing

a seamless implementation, so you can begin onboarding your merchants and realize revenue on your timeline.

We are not only in the payments business, but also in the business of elevating our partners' value with software-led payments. We're committed to helping your brand stand out from the crowd now, while driving scalable and sustainable growth into the future.





# Powering payments for leading software providers

Explore SaaS platform success stories and see how companies are using the competitive advantage of a Worldpay for Platforms partnership to retain and grow their software user base.

[Read customer stories](#)



# Ready to grow with payments and experience an expert-led implementation?

Contact us today to learn more

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