SaaS Subscription Management Checklist

This checklist is designed to guide you through setting up and optimizing your SaaS subscription management process. Tick off each item as you implement it!

1. Define Your Subscription Tiers:

- [ ] Clearly outline 3-5 distinct subscription tiers with unique names (e.g., Basic, Pro, Enterprise).
- [ ] For each tier, explicitly list all included features and functionalities.
- [ ] Define usage limits (e.g., number of users, storage, API calls) for each tier.
- [ ] Establish clear pricing (monthly and/or annual) for each tier.
- [ ] Determine if you will offer a free trial and its duration/features.
- [ ] Consider offering discounts for longer-term commitments (e.g., annual plans).
- [ ] Document your proration policy for upgrades/downgrades.
- [ ] Research competitor pricing and offerings to inform your tier structure.
- [ ] Analyze the value proposition of each tier for different customer segments.

2. Select Your Subscription Management Platform:

- [ ] Identify and research at least 3 potential subscription management platforms or Merchant of Record (MOR) options.
- [ ] Evaluate platforms based on key features (refer to the guide's Step 2).
- [ ] Check for flexible plan and pricing configuration capabilities.
- [ ] Ensure automated recurring billing and invoicing are robust.
- [ ] Verify comprehensive subscription lifecycle management features.

- [ ] Assess the quality and features of the customer portal.

- [ ] Confirm strong dunning management and revenue recovery tools.

- [ ] Evaluate the reporting and analytics capabilities.

- [ ] Check for secure payment processing and PCI DSS compliance.

- [ ] Ensure seamless integrations with your other business systems (CRM, accounting, etc.).

- [ ] Compare pricing models and fees of different platforms.

- [ ] Read customer reviews and testimonials.

- [ ] Request demos or trials of your top choices.

- [ ] Select and onboard with your chosen platform.

3. Configure Your Subscription Plans in the Platform:

- [ ] Create each of your defined subscription tiers as a distinct plan within the platform.

- [ ] Accurately input the billing frequency (monthly, quarterly, annually).

- [ ] Set the correct price for each billing cycle.

- [ ] Clearly link the features and usage limits each plan (as defined in Step 1)

- [ ] Configure any free trial settings (duration, included features, conversion process).

- [ ] Implement any promotional codes or discount rules.

- [ ] Define your proration rules for plan changes.

- [ ] Set up any add-on features or one-time charges if applicable.

4. Automate Recurring Payments:

- [ ] Integrate your chosen payment gateway(s)/solution with the subscription platform.

- [ ] Configure automated billing schedules based on plan frequencies.

- [ ] Customize payment confirmation emails with your branding.

- [ ] Set up a dunning management strategy (retry attempts, email notifications).

- [ ] Ensure customers can securely manage their payment methods.

- [ ] If serving a global audience, configure multi-currency support if available.

5. Build and Review Your Subscription Management Dashboard:

- [ ] Familiarize yourself with the reporting and analytics dashboard of your chosen platform.

- [ ] Ensure you can easily track Monthly Recurring Revenue (MRR).

- [ ] Confirm you can monitor Customer Churn Rate.

- [ ] Locate Customer Lifetime Value (CLTV) data.

- [ ] Identify where to track Customer Acquisition Cost (CAC).

- [ ] Set up custom reports for other relevant KPIs (e.g., trial conversion rate).

- [ ] Regularly review your dashboard (at least weekly).

- [ ] Identify any trends or areas for concern in your subscription metrics.

6. Implement User Account Management & Support:

- [ ] Integrate your user authentication system with your subscription platform (via API or direct integration).

- [ ] Automate the provisioning of user access based on their subscription plan.

- [ ] Automate the de-provisioning of user access upon cancellation or downgrade.

- [ ] If applicable, implement Role-Based Access Control (RBAC) linked to subscription tiers.

- [ ] Provide users with a clear way to view their subscription details within your SaaS app.

- [ ] Set up multiple customer support channels (email, chat, knowledge base).

- [ ] Consider offering 24/7 support for critical billing issues.

- [ ] Develop a comprehensive and easily accessible customer portal.

- [ ] Ensure the customer portal allows users to manage their subscriptions, update payment info, and view billing history.

7. Ongoing Monitoring and Optimization:

- [ ] Schedule regular reviews (e.g., monthly) of your key subscription metrics.

- [ ] Analyze customer behavior related to plan usage and churn.

- [ ] Gather customer feedback on pricing and subscription experience.

- [ ] Plan and execute experiments with pricing or features (A/B testing).

- [ ] Stay informed about industry best practices and platform updates.

- [ ] Regularly update your knowledge base based on support inquiries.

- [ ] Review and optimize your dunning management strategy as needed.