Selling AI SaaS Products Checklist

Step 1: Understand Your Product & Market

- [ ] Define the core problem your AI SaaS solves and for whom.
- [ ] Quantify the value proposition (e.g., hours saved, accuracy improved, revenue uplift).
- [ ] Develop detailed Ideal Customer Profile(s) (ICP), including industry, role, and pain points.
- [ ] Validate your ICP through market research, surveys, or interviews.
- [ ] Analyze key competitors: understand their product positioning, features, and pricing.
- [ ] Identify alternative solutions or manual processes your potential customers might use.
- [ ] Clearly define and document your Unique Selling Proposition (USP).

Step 2: Select & Validate Your Pricing Model

- [ ] Identify the primary value metric(s) customers derive from your AI (e.g., per API call, per report, per feature set).
- [ ] Calculate your estimated underlying costs per unit of consumption (compute, third-party APIs, etc.).
- [ ] Evaluate suitable pricing models (Tiered, Usage-Based, Per-User, Hybrid) based on costs, value, and market norms.
- [ ] Select an initial pricing model and define specific tiers or usage rates.
- [ ] Conduct competitor pricing analysis.
- [ ] Assess if your chosen model creates acceptable budget predictability for customers.
- [ ] Plan and execute pricing validation (A/B tests, feedback surveys, beta program analysis).

☐ Confirm your chosen billing system or payment partner can accurately track and bill according to your model.

Step 3: Evaluate & Select Payment Partner

☐ Clearly understand the roles and responsibilities of a Payment Service Provider (PSP) vs. a Merchant of Record (MoR).

☐ Honestly assess your team's internal capacity (time, expertise, budget) for managing global tax, compliance, and fraud liability.

☐ Determine your strategy: Use a PSP and integrate necessary third-party tools OR partner with an all-in-one MoR.

☐ Evaluate potential partners against your requirements checklist:

- Global Payment Methods & Currency Support
- Automated Global Tax Calculation & Remittance (Confirm liability handling)
- Adherence to Compliance Standards (GDPR, CCPA etc.)
- Support for Your Chosen Pricing/Subscription Model
- Dunning Management Features
- Customer Self-Service Portal Availability
- Security Certifications (PCI DSS Level 1 minimum)
- Advanced Fraud Prevention Capabilities (AI/ML detection preferred)
- Suitable Integration Options (API, Hosted Pages, Plugins)
- Checkout Customization Capabilities
- Clear Support Channels & Service Level Agreements (SLAs)
- Transparent and acceptable Pricing/Fee Structure

☐ Select the partner or combination of tools that best fits your strategy, resources, and requirements.

Step 4: Integrate Payment Solution Meticulously

☐ Choose the integration method (API/SDK, Hosted Page, Plugin) based on resources and desired experience.

- ☐ Design and implement a clear, user-friendly, and trustworthy checkout flow.

- ☐ Configure your product catalog, pricing plans, taxes, and trial periods accurately within the partner's platform.

- ☐ Set up necessary webhooks or callbacks for real-time transaction/subscription updates.

- ☐ Conduct thorough testing in a sandbox environment:

  - Test successful payments with various methods/cards/currencies.
  - Test payment failure scenarios and error handling.
  - Test full subscription lifecycle (signup, renewal, changes, cancellation).
  - Test tax calculations across different customer locations.
  - Test discount/coupon code functionality.
  - Verify data accuracy in your system and the partner platform post-transaction.

- ☐ Set up automated dunning processes that are active and effective; monitor results.

Step 5: Verify Security & Compliance Continuously

- ☐ Obtain and review your partner's compliance documentation (PCI Attestation, SOC reports, etc.).

- ☐ Implement and maintain security best practices within your own application architecture.

- ☐ Review and understand the Data Processing Agreement(s) (DPAs) with your partner(s).

- ☐ Ensure your user-facing Privacy Policy accurately reflects data handling practices.

- ☐ Establish a process for ongoing monitoring of security and compliance adherence.

Step 6: Configure & Monitor Fraud Prevention

- [ ] Familiarize yourself with the fraud prevention tools offered by your partner/tools.
- [ ] Configure initial risk thresholds and fraud rules based on your business profile.
- [ ] Implement specific security measures (e.g., require 3D Secure for certain transactions).
- [ ] Set up regular monitoring of fraud attempt reports and chargeback data.
- [ ] Define a process for analyzing fraud patterns and adjusting rules periodically.
- [ ] Establish a process for analyzing payment decline reasons and optimizing success rates (e.g., consulting partner on routing).

Step 7: Establish Comprehensive Customer Support

- [ ] Define support channels and processes for technical product assistance (e.g., ticketing system).
- [ ] Establish and communicate expected support response times (SLAs).
- [ ] Create and maintain a searchable Knowledge Base / FAQ section.
- [ ] Develop comprehensive Technical Documentation (API guides, etc.).
- [ ] Create user-friendly onboarding Tutorials (video/written).
- [ ] Set up and promote a Customer Portal for self-service (account, subscription, billing).
- [ ] Clearly document internal procedures for handling billing/payment support inquiries (direct vs. escalation to partner).
- [ ] Train internal support staff on these procedures and boundaries.
- [ ] Ensure customers can easily update payment details via the self-service portal.