SaaS Checkout Process Optimization Checklist

Simplicity and Clarity

- [ ] Audit every form field and justify its absolute necessity for the immediate transaction.
- [ ] Remove at least two non-essential fields, such as phone number or company name, from the initial checkout.
- [ ] Confirm guest checkout is enabled and is the most prominent option for new customers.
- [ ] Consolidate all checkout steps onto a single page where possible.
- [ ] If using multiple pages, verify a clear progress indicator is always visible to the user.
- [ ] Review the final pricing summary to ensure all potential taxes and fees are itemized and transparent.

Trust and Security

- [ ] Verify that your SSL certificate badge is clearly visible on the page.
- [ ] Place PCI DSS compliance and other security logos directly beside the payment information fields.
- [ ] Rewrite all error messages to be specific and helpful, guiding the user to the correct input.

Choice and Convenience

- [ ] Integrate major digital wallets, like PayPal or Google Pay, as a payment option.

- [ ] Identify your top international market and add at least one popular local payment method for that region.

- [ ] Implement a geo-location tool to automatically display prices in the customer's local currency.

Mobile Experience

- [ ] Complete a test purchase using a real mobile device, not just a browser emulator.

- [ ] Check that the correct keyboard (e.g., numeric, email) automatically appears for each relevant form field on mobile.

- [ ] Ensure all buttons and form fields are large enough to be easily tapped with a thumb.

Analysis and Iteration

- [ ] Set up a conversion funnel in your analytics tool that tracks each step of the checkout process.

- [ ] Identify the single biggest drop-off point in your funnel where most users leave.

- [ ] Formulate and launch one A/B test based on your biggest identified drop-off point.

- [ ] Schedule a monthly review of your checkout conversion rate to track progress.