

Moving SaaS Upmarket Checklist

This checklist organizes the essential tasks across four critical domains required to successfully shift your focus from SMB to Enterprise.

1. Market Assessment and Foundation

- ☐ Analyze the last 12 months of sales data to confirm organic demand and the ideal enterprise customer profile.
- ☐ Identify the exact security and compliance requirements (e.g., SOC 2, specific data residency needs) mandated by your target enterprise segment.
- ☐ Define a clear 12-month product roadmap focused on enterprise "**table stakes**" features like Single Sign-On (SSO) and advanced audit logging.
- ☐ Allocate a dedicated, cross-functional budget and team for the **upmarket** transition, recognizing the **6-12 month** investment period.
- ☐ Determine your legal and financial readiness to handle Master Services Agreements (MSAs) and long contract negotiations.

2. Product and Partnership Strategy

- ☐ Identify 1-2 recognized industry thought leaders to serve as your first **charter customer** partners.
- ☐ Establish a formal, dedicated feedback loop (e.g., a quarterly Product Steering Meeting) with your charter customer's technical leaders.
- ☐ Resist requests for **product customization**; focus development efforts solely on building adaptable **configurability** features.
- ☐ Position your offering not as a tool, but as a **strategic platform solution** with clear long-term growth capabilities.
- ☐ Ensure deep platform integration capabilities (APIs) are ready to meet the IT landscape demands of large organizations.

3. Pricing, Billing, and Global Compliance

- ☐ Eliminate simple per-user pricing; restructure to a **complex pricing scheme** using tiered models that combine base fees with usage or value metrics.
- ☐ Set up systems to accurately capture and track consumption data necessary for usage-based components.
- ☐ Engage a specialist service like a Merchant of Record to offload all burdens related to **global sales tax/VAT remittance, registrations, and filings**.
- ☐ Prepare robust legal documentation, including SLAs with guaranteed Mean Time To Repair (MTTR), to meet enterprise contract standards.

4. Enterprise Sales and Customer Success

- ☐ Develop a sophisticated **Strategic Narrative** and new GTM content specifically targeting CIOs and multiple executive stakeholders.
- ☐ Train the sales team on the "**Land and Expand**" motion, focusing on deep account penetration rather than rapid customer acquisition.
- ☐ Form a **Customer Advisory Board (CAB)** to formalize feedback, build executive relationships, and foster market advocacy.
- ☐ Implement an **Executive Sponsorship Program** where senior leaders are assigned directly to key accounts, providing a proactive, high-touch support channel.
- ☐ Commit to co-publishing 2-3 detailed, high-quality customer success stories or case studies within the first year to build social proof.