SaaS Revenue Leakage Checklist

This checklist provides clear steps derived from the guide to help you systematically identify and fix sources of revenue leakage in your digital product business.

Phase 1: Quantify and Audit Leakage

- [ ] Calculate your **Revenue Leakage Rate** monthly by comparing forecasted MRR (Expected Revenue) against actual cash collected.

- [ ] Isolate the leakage gap into three categories: **Billing Errors**, **Usage Gaps**, and **Collection Issues** (**Involuntary Churn**).

- [ ] Perform the "**Staple to an Order**" audit by tracing a complex customer quote through the entire Order-to-Cash process to manually find where data breaks down.

- [ ] Review all existing customer contracts to ensure that price uplifts and renewal dates are accurately logged in your billing system, not just in a spreadsheet.

Phase 2: Centralize Governance and Pricing Control

- [ ] Establish a **centralized digital product catalog** where all pricing rules, tiers, and currencies are managed from a single source of truth.

- [ ] Define and enforce strict, role-based **access controls** that prevent sales or customer success teams from manually overriding approved discount levels.

- [ ] Implement **hard-coded expiration dates** on all promotional discounts, free trials, and temporary coupons within the billing system.

- [ ] Configure the checkout and quote generation tools to pull pricing data directly from the centralized catalog, ensuring the customer's final price is always correct.

Phase 3: Implement Automated Revenue Assurance

- [ ] Migrate your manual billing processes to a **specialized automated MoR platform** to eliminate human data entry errors in invoicing.

- [ ] Integrate your usage metering tools (for API calls or seats) directly with your billing system to guarantee all billable consumption is captured immediately.

- [ ] Ensure your payment provider supports a **wide range of global and alternative payment methods** (like Boleto, SEPA, and local debit cards) to maximize authorization rates.

- [ ] Activate a **smart dunning system** that automatically attempts payment retries using optimized timing and sends automated, localized reminders for expiring customer credit cards.

- [ ] Review your system integration health every quarter to confirm that data flows seamlessly between your CRM, MoR platform, and accounting software, closing off data synchronization gaps.