

Subscription Revenue Optimization Checklist

This checklist provides a technical and operational roadmap to identify revenue leaks and scale your subscription billing infrastructure.

- Analyze your last 100 customer signups to identify high-value behavioral patterns.
- Categorize your user base into at least three distinct segments based on their willingness to pay.
- Implement a tiered pricing structure that includes an Entry, Professional, and Enterprise level.
- Set up feature-gating to ensure high-demand automation tools are locked behind your Professional tier.
- Add an Enterprise tier with custom pricing prompts to capture high-value corporate contracts.
- Audit your trial conversion rate to see if it meets the industry average of 42%.
- Add a credit card requirement to your free trial to filter for high-intent leads.
- Create a progress-based onboarding checklist to reduce the time-to-value for new users.
- Configure automated in-app notifications to trigger when a user reaches 80% of their plan limits.
- Offer an annual billing discount to improve immediate cash flow and reduce monthly churn risk.
- Establish a 3-stage dunning email schedule to recover failed payments at Day 0, Day 3, and Day 7.
- Set up a mandatory one-question exit survey for users who initiate the cancellation process.
- Apply a "95/5" rule to community engagement by providing technical value before mentioning your product.

- Monitor niche forums for keywords like "alternative to [Competitor]" to find active leads.
- Enable local payment methods like iDEAL for the Netherlands and Pix for Brazil to improve checkout rates.
- Use a local acquiring bank or a Merchant of Record to reduce international credit card decline rates.
- Verify that your invoicing system is fully compliant with global VAT and Sales Tax regulations.
- Automate your licensing delivery to provide immediate product access after a successful payment.
- Review your LTV:CAC ratio monthly to ensure it remains at or above the 3:1 benchmark.
- Draft a win-back email campaign specifically targeted at users who lapsed within the last 90 days.