

SaaS Customer Engagement Audit Checklist

This checklist provides a systematic framework to transition from basic data collection to advanced engagement optimization. Use these points to ensure no critical part of your customer journey is left unmonitored.

Phase 1: Strategic Alignment

- Select one "North Star" metric that represents the primary value your product provides to a customer.
- Define a "Successful Onboarding" event based on the completion of core setup tasks.
- Establish a baseline for Daily Active Users (DAU) and Monthly Active Users (MAU).
- Set specific, time-bound targets for feature adoption rates for your three most important tools.
- Identify the "Aha! Moment" by finding the common action shared by your longest-retaining users.

Phase 2: Technical Implementation

- Verify that your analytics tracking code is active on all production environments.
- Map every button click and form submission related to your North Star metric as a custom event.
- Integrate server-side webhooks to track backend actions like data exports or API calls.
- Implement a unique User ID system to prevent data duplication across web and mobile platforms.

- Link your payment processor data with your product analytics to track engagement versus revenue.
- Create a centralized dashboard that displays real-time stickiness ratios (DAU/MAU).

Phase 3: Qualitative and Quantitative Analysis

- Build a retention cohort table to monitor how long users from specific sign-up months stay active.
- Segment your customer base into "Power Users," "Casual Users," and "At-Risk Users" based on activity.
- Conduct a path analysis to see where customers most frequently drop off during the first 24 hours.
- Trigger an NPS survey specifically for customers who have reached a high engagement score.
- Audit your session durations to determine if long sessions indicate high value or user confusion.

Phase 4: Optimization and Response

- Launch an automated email sequence triggered when a user's engagement score drops by 30%.
- Deploy in-app tooltips to guide customers toward underutilized features with high retention correlation.
- A/B test your onboarding flow to reduce the Time-to-Value (TTV) for new registrations.
- Remove or hide features that show less than 5% adoption over a rolling 90-day period.
- Update your product roadmap based on the behaviors of your most engaged user segment.