The Ultimate SaaS Expansion Revenue Checklist

This checklist provides a technical and strategic roadmap for identifying, capturing, and maintaining expansion opportunities within your existing user base.

Phase 1: Revenue Auditing & Baseline Setup

- [ ] Access your billing data and isolate all revenue generated from existing customers over the last 30 days.
- [ ] Exclude all "New Business" revenue and focus strictly on plan upgrades, seat additions, and add-on purchases.
- [ ] Use the NRR Calculator to determine if your current existing base is growing or shrinking independently of new sales.
- [ ] Segment your customers into three cohorts based on usage: Under-utilizers, Healthy Users, and Power Users.
- [ ] Identify the "Contraction MRR" to see where customers are downgrading and document the reasons why.

Phase 2: Pricing Infrastructure & Value Mapping

- [ ] Review your current pricing page to ensure there is a clear tiered pricing structure that scales with volume.
- [ ] Select one primary value metric, such as number of contacts, API calls, or storage, that naturally increases as your customer grows.
- [ ] Audit your feature set to identify "Enterprise-only" tools like SSO, audit logs, or advanced permissions that can be unbundled as add-ons.
- [ ] Set an upgrade price point that is between 25% and 50% higher than the previous tier to ensure the jump is justifiable but significant.

- [ ] Draft a clear "Shadow Billing" notification that shows users what they would save or gain by moving to the next level based on their current trajectory.

Phase 3: Technical Implementation of Triggers

- [ ] Build a progress bar in the main user dashboard that visually tracks usage against the current plan limit.
- [ ] Deploy "soft-gate" modals that trigger when a user reaches 80% of their allocated limit with a direct link to the upgrade page.
- [ ] Integrate in-app payment windows to allow users to upgrade without leaving their current workflow.
- [ ] Create a "Locked Feature" UI state where high-tier features are visible but greyed out to pique interest among lower-tier users.
- [ ] Test your one-click upgrade flow to ensure that seat additions or plan changes reflect in the billing system within seconds.

Phase 4: Expansion Marketing & Sales Workflows

- [ ] Set up an automated email campaign targeting users who have been active for 90 days but are still on the "Starter" plan.
- [ ] Offer a timed discount for users to switch from monthly to annual billing to lock in their current rate.
- [ ] Train your support or Customer Success Managers to mention relevant add-ons during routine troubleshooting or check-in calls.
- [ ] Launch a "Loyalty Upgrade" promotion for long-term users, offering them a higher tier at a legacy discount for the first six months.
- [ ] Review your "Lost Upgrade" data monthly to see at which step of the checkout process users are abandoning their expansion purchase.

Phase 5: Maintenance & Optimization

- [ ] Calculate your LTV to CAC ratio specifically for expanded accounts to prove the ROI of your expansion efforts.
- [ ] Conduct quarterly A/B testing on your pricing to see if different limit thresholds increase the upgrade velocity.
- [ ] Update your SaaS refund policy to clearly address how credits are handled during mid-cycle plan upgrades.
- [ ] Monitor your product adoption rate for new add-ons to decide whether to keep them separate or fold them into a higher tier.
- [ ] Schedule a monthly "Expansion Review" meeting to align product development with the features most frequently requested by upgrading customers.