

# The SaaS Pitch Readiness Checklist

This isn't a list of "best practices" that look good on paper but fail in a real meeting. It is a functional set of checkpoints to ensure you don't get blindsided by a technical question or a sudden request for your churn metrics. Use this to audit your deck and your talking points before you hit "Join Meeting."

## Section 1: Auditing Your "Pain" Narrative

- Identify the single most expensive manual workaround.** You need to name the specific "spreadsheet hell" or "broken integration" your prospect is currently using to survive.
- Quantify the labor leak in hours per week.** If you can't tell them exactly how many hours their team is wasting, your pitch will sound like an optional "nice-to-have" rather than a necessity.
- Determine who actually signs the check.** Often the person you are pitching loves the features, but the "Economic Buyer" only cares about the bottom line and risk mitigation.
- Strip out every buzzword from your first three slides.** If you see words like "revolutionary," "seamless," or "cutting-edge," delete them and replace them with a factual description of what the code actually does.

## Section 2: Technical and Demo Proofing

- Record a high-resolution "Safety Demo" video.** WiFi fails and staging environments crash exactly when you need them most, so have a 2-minute narrated clip ready to screen-share.
- Map your features to specific business outcomes.** Instead of saying "We have a 256-bit encrypted API," say "Your data stays private and meets SOC2 compliance so your legal team doesn't block the deal."
- Limit your live walkthrough to three clicks.** If it takes more than three clicks to show the "Aha!" moment of your software, your interface is too cluttered for a first pitch.

- Prepare a "Security Fact Sheet" as a separate PDF. Technical stakeholders will eventually ask about data residency and encryption; having this ready to send immediately makes you look like an established enterprise.

### Section 3: The Investor and Growth Math

- Verify your Customer Acquisition Cost (CAC) against real spend. Investors will sniff out "estimated" marketing costs immediately, so be ready to show exactly what a lead costs you today.
- Calculate your "Net Revenue Retention" for the last six months. It is not enough to show new signups; you have to prove that your current customers are actually sticking around and growing.
- Define your "Runway" in months. You need to know exactly when the bank account hits zero if you don't raise this round or close these five pilots.
- State your "Unfair Advantage" in one sentence. Explain why a giant like Microsoft or Google hasn't already killed your idea—whether it's a specific data moat or a niche integration they don't care about yet.

### Section 4: Closing the Momentum Gap

- Set up your global payment rails before the pitch. Partner with a merchant of record so you can tell a prospect, "We can start the pilot today and handle the localized tax and billing in your region automatically."
- Draft your "Post-Pitch" follow-up email before the meeting starts. Include a link to the deck and a clear calendar invite for a technical deep-dive so you can hit "Send" the moment the Zoom call ends.
- Define a "Hard Date" for the pilot program. Don't ask "when would you like to start?" Instead, say "We have a slot for a guided implementation starting on the 15th; does that work for your team?"