

# SaaS Customer Loyalty Checklist

- Audit your current customer lifecycle to identify where users typically drop off or stop engaging.
- Set a benchmark for Net Revenue Retention using a calculator to track your current growth stability.
- Define the "First Value" milestone that represents a successful initial result for your specific user base.
- Configure an automated onboarding sequence that guides every new signup toward that first milestone within 24 hours.
- Embed progress trackers in the user dashboard to visually motivate customers to complete their setup.
- Categorize users into at least three segments based on their industry, role, or feature usage patterns.
- Customize in-app messaging to offer relevant feature tips to each specific user segment.
- Establish a searchable knowledge base containing at least ten articles addressing your most frequent support tickets.
- Schedule a recurring Net Promoter Score survey to go out to users after their first 30 days of activity.
- Define three reward tiers for your loyalty program such as account credits, beta access, or free seat upgrades.
- Create a referral dashboard where advocates can easily track the rewards they earn for bringing in new leads.
- Implement dunning management tools to automatically recover revenue from failed or expired credit card payments.
- Review your checkout process for localization to ensure it offers local currencies and preferred payment methods.



Conduct a monthly churn analysis to find common patterns among users who canceled their subscriptions.

