

SaaS Retention Marketing Checklist

This checklist provides a technical roadmap to ensure your retention framework is fully operational and capable of driving long-term revenue.

Phase 1: Metric and Baseline Setup

- Calculate your current Net Revenue Retention (NRR) using a dedicated tool to identify your growth baseline.
- Audit your churn data to determine the ratio between voluntary cancellations and involuntary payment failures.
- Set a benchmark for your Customer Lifetime Value (CLV) to ensure your retention spend does not exceed 33% of a customer's worth.
- Identify the "Aha! moment" in your product to measure how quickly users find value.

Phase 2: Billing and Revenue Recovery

- Connect your platform to a system to automate dunning and payment retries.
- Configure pre-renewal email triggers to go out 7 days before a subscription expires.
- Set up smart routing for payment gateways to increase authorization rates and prevent local bank declines.
- Implement a mandatory 3-day grace period for failed payments before restricting account access.

Phase 3: Automated Communication Journeys

- Create a re-engagement email sequence for users who have not logged in for more than 10 days.
- Establish that automatically offer higher tiers when a user reaches 80% of their plan limits.
- Build a cancellation flow that includes a "pause subscription" option to prevent total account loss.
- Design a for users who have churned in the last 6 months, highlighting new feature releases.

Phase 4: User Experience and Control

- Deploy a dashboard that allows users to change without support help.
- Integrate in-app tooltips that highlight the specific user hasn't tried yet.
- Set up for plan upgrades to capture expansion revenue instantly.
- Conduct monthly to categorize reasons for churn and adjust your product roadmap.

Phase 5: Data Personalization

- Use first-party data to calculate a weekly for every active account.
- Segment your users based on metrics to identify your most valuable cohorts.
- Automate "Health Check" emails for accounts with a declining engagement score to offer a 1-on-1 demo or support session.