

The SaaS Funnel Audit Checklist

Phase 1: Funnel Architecture & Financial Assessment

- ☐ Calculate your Average Contract Value (ACV) and target segment to choose your model: self-service for low ACV (under \$1,000/year) or sales-assisted with product demos for high ACV (over \$10,000/year).
- ☐ Estimate the average financial value of a single closed account over its lifespan to set acquisition budgets.
- ☐ Determine if users can independently experience core software utility within 15 minutes of logging in.
- ☐ Identify if target buyers require security reviews, custom procurement contracts, or dedicated integrations.
- ☐ Calculate the exact ratio between lead generation spend and contract value tiers to reserve high-cost outbound assets exclusively for high-revenue accounts.

Phase 2: Top-of-Funnel Traffic Acquisition

- ☐ Focus content strategy on problem-specific search queries rather than broad category terms to attract high-intent users.
- ☐ Align user search intent directly with feature-specific landing pages to minimize downstream Customer Acquisition Cost (CAC).
- ☐ Publish long-form technical articles for Organic Search (SEO) targeting a 2% to 3% click-through rate to sign up.
- ☐ Design feature-specific landing pages for Paid Search (PPC) targeting a 5% to 8% form completion rate.
- ☐ Build free web tools or analyzers to drive Product-Led Growth with a target 10% tool-to-account creation rate.

Phase 3: Lead Capture & Friction Reduction

- ☐ Create clear entry points through self-service signup forms or product demonstrations.
- ☐ Match landing page headlines exactly with advertising creative copy to avoid drop-offs.
- ☐ Remove non-essential form fields like phone numbers and company size from registration forms.
- ☐ Evaluate trial registration models: select an opt-in trial (no card required) to maximize signup volume, or an opt-out trial (card required) to filter for high-intent prospects.
- ☐ Implement organic viral mechanics, such as referral storage or feature incentives for inviting team members.

Phase 4: User Activation & Onboarding

- ☐ Map out the exact "Aha! moment" milestone where users first experience the core utility of the software.
- ☐ Monitor real-time user activity during the trial window to trigger contextual, behavior-based guidance.
- ☐ Configure onboarding steps to encourage early usage habits that correlate directly with long-term retention.
- ☐ Set up automated email sequences triggered when a user fails to complete the first setup step within 24 hours.
- ☐ Integrate subscription tools directly into the onboarding flow to trigger contextual trial extensions or plan comparisons based on user engagement.

Phase 5: Trial-to-Paid Conversion & Payment Infrastructure

- ☐ Establish transparent subscription pricing tiers aligned directly with user consumption metrics.
- ☐ Configure automated email triggers and in-app prompts to transition active trial users into paid subscribers without manual engineering intervention.
- ☐ Evaluate conversion driver benchmarks: expect 2% to 5% for Opt-In Free Trials, 30% to 45% for Opt-Out Free Trials, and 1% to 3% for Freemium models.
- ☐ Integrate global payment processing that handles multi-currency support, localized payment methods, and global SaaS sales tax compliance out of the box.
- ☐ Configure real-time card account updaters and automated retry logic within billing models to prevent involuntary churn from bank declines.

Phase 6: Funnel Metrics & Optimization

- ☐ Track Unique Web Visitors at the Top of Funnel to monitor marketing acquisition performance.
- ☐ Measure the Product Signup Rate at the Middle of Funnel to gauge consideration and lead capture efficiency.
- ☐ Calculate Customer Acquisition Cost (CAC) against Customer Lifetime Value (LTV) at the Bottom of Funnel to verify acquisition sustainability.
- ☐ Measure step-by-step conversion rates between consecutive pipeline milestones to pinpoint drop-off points.
- ☐ Continuously analyze user behavior data to isolate and resolve operational bottlenecks across the pipeline.