SaaS Renewal Rate Improvement Checklist

A working checklist for improving subscription renewal rates — a companion resource for the guide “How to Improve Subscription Renewal Rates.” Work through each section before your next renewal cycle.

1. Measure Renewal Rate Correctly

- [ ] Calculate gross revenue retention (GRR) separately from net revenue retention (NRR).
- [ ] Confirm your renewal rate formula matches how it's reported to leadership or the board.
- [ ] Benchmark GRR and NRR against your own segment, not a blended industry average.

2. Start the Renewal Process Before the Deadline

- [ ] Set a 90-120 day engagement window for enterprise or high-ACV accounts.
- [ ] Set a 30-60 day window for mid-market accounts.
- [ ] Set up automated reminders ahead of self-serve or SMB auto-renewal charges.

3. Track Usage and Health Signals Early

- [ ] Track feature adoption and active-seat trends by account, not just logins.
- [ ] Flag declining usage, a departed champion, or reduced activity as renewal risks.
- [ ] Pair every health score with a plain-language reason it changed.

4. Match the Renewal Model to the Account

- [ ] Confirm which accounts are on auto-renewal, manual renewal, or assisted renewal.
- [ ] Add an assisted check-in to auto-renewing accounts above a chosen ARR threshold.
- [ ] Review whether the current model still fits each segment as accounts grow.

5. Fix Payment-Related Renewal Failures

- [ ] Set up scheduled retries for failed renewal charges.
- [ ] Send a separate notice when a renewal charge fails, not just before it's due.
- [ ] Offer a self-serve way to update payment details.
- [ ] Track payment-caused renewal losses separately from active cancellations.

6. Lead the Renewal Conversation With Value

- [ ] Bring account-specific usage data into every renewal or business review.
- [ ] Connect usage to an outcome the customer's team would recognize.
- [ ] Address any known risk directly before the renewal date, not after.

7. Build in Expansion and Multi-Year Options

- [ ] Offer a multi-year term with a modest discount where usage is stable
- [ ] Raise seat or tier expansion only where account data supports it

- [ ] Skip expansion offers for accounts showing early risk signals.

8. Document and Improve the Process

- [ ] Record the reason for every lost renewal, not just that it was lost.
- [ ] Review win/loss patterns by segment on a regular cadence.
- [ ] Update the renewal playbook based on what those patterns show.

Companion resource for: “How to Improve Subscription Renewal Rates”