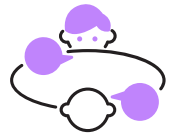


SaaS Customer Retention Checklist



Onboarding Excellence

- ☐ Have you provided a comprehensive product walkthrough for new customers?
- ☐ Are training resources, such as videos or guides, easily accessible?
- ☐ Do you have a dedicated support team or onboarding specialist assigned to new accounts?
- ☐ Are there personalised touchpoints during the first 30-90 days?



Proactive Customer Support

- ☐ Do you regularly check in with customers to identify and solve potential issues early?
- ☐ Is your support team equipped to respond quickly to customer inquiries?
- ☐ Are you using tools or platforms that allow for real-time communication and problem-solving?



Usage Monitoring and Health Scores

- ☐ Are you actively tracking customer engagement and product usage?
- ☐ Have you set up health scores to monitor customer satisfaction and risks of churn?
- ☐ Do you have a system in place to flag underutilised accounts for further action?



Customer Feedback Loops

- ☐ Do you have mechanisms in place to regularly collect customer feedback (e.g., surveys, interviews)?
- ☐ Are you using this feedback to inform product development and customer experience improvements?
- ☐ Are customer concerns followed up with personalised responses or solutions?



Personalised Communication and Engagement

- ☐ Are your communications tailored to individual customer needs and stages?
- ☐ Do you segment customers based on usage patterns or other relevant criteria?
- ☐ Are you sending regular updates, tips, or personalised content to keep customers engaged?



Upsell and Cross-Sell Opportunities

- ☐ Are you identifying and acting on upsell or cross-sell opportunities?
- ☐ Are these opportunities presented in a way that adds clear value to the customer?
- ☐ Do you have a process for tracking successful upsell and cross-sell engagements?



Continuous Product Education

- ☐ Are you offering ongoing educational resources such as webinars or tutorials?
- ☐ Do customers have access to a knowledge base or community forum?
- ☐ Are you regularly updating customers on new features and best practices?



Customer Success Programs

- ☐ Have you defined a customer success journey that aligns with their goals?
- ☐ Are you celebrating customer milestones (e.g., anniversaries, usage achievements)?
- ☐ Are you regularly reviewing customer goals to ensure you're helping them succeed?

