

CRO Consultants

SaaS CRO Audit Checklist

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SaaS optimization is about converting users through trials and onboarding to long-term subscribers. This checklist reflects a behavior-driven, data-informed approach to refining each conversion trigger across the funnel.

Trial Signups

Remove credit card requirement for trial signup

| **Why it matters:** Boosts trial registrations.

Clearly communicate trial duration and limitations

| **Why it matters:** Manages expectations and trust.

Present key benefits and feature highlights early

| **Why it matters:** Helps users quickly see value.

Onboarding & Activation

In-app guidance (tooltips, checklists) for first use

| **Why it matters:** Accelerates activation and engagement.

Trigger emails for key milestones (setup, feature usage, upgrades)

| **Why it matters:** Helps personalize the experience, sustain engagement signals, and build adaptive retention loops based on actual user behavior analysis.

Monitor drop-off during critical setup steps

| **Why it matters:** Supports targeted UX improvements.

Pricing & Upgrade Flow

Offer clear plan comparisons and feature tiers

| **Why it matters:** Simplifies upgrade decisions.

Display case studies and customer logos on pricing pages

| **Why it matters:** Provides social proof and credibility.

Include clear CTAs for demos or paid signups

| **Why it matters:** Reduces hesitation to reach out or pay.

Retention & Upsell

Monitor usage patterns to identify churn risk

| **Why it matters:** Enables proactive customer retention outreach.

A/B test upgrade CTAs and in-app prompts

| **Why it matters:** Increases trial-to-paid conversion rate.

Send nurture emails highlighting premium features

| **Why it matters:** Guides users towards higher-value plans.

Ready to boost your conversion rates?

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