



# SaaS Subscription Renewal & Retention Support Checklist 2026

## Pre-Renewal Account Health Audit

Evaluate usage metrics, feature adoption rates, and recent support ticket frequency to identify at-risk accounts before the renewal window opens.

### Last Login Date

### Active User Count

### Account Health Score

- ☐ Healthy
- ☐ At Risk
- ☐ Critical/Churn Risk

### Identified Pain Points

- ☐ Low Feature Adoption
- ☐ High Support Ticket Volume
- ☐ Budgetary Constraints
- ☐ Competitor Interest
- ☐ Technical Integration Issues

### Usage Trend Analysis

Write something...

### Quarterly Usage Report

 Upload File

## Subscription Milestone Tracking

Verify upcoming renewal dates, -contract terms, and upcoming price adjustments or tier upgrades to ensure transparency with the client.

### Subscription Expiry Date

Enter date...

### Renewal Notice Sent Date

Enter date...

### Subscription Tier

- ☐ Basic
- ☐ Professional
- ☐ Enterprise
- ☐ Custom/Unlimited

### Contract Value (ARR/MRR)

Enter a number...

### Upcoming Renewal Milestones

- ☐ 90-Day Review
- ☐ 60-Day Value Assessment
- ☐ 30-Day Renewal Negotiation
- ☐ Final Notice/Notice of Non-Renewal

### Current Contract Document

 Upload File

## Customer Engagement & Value Demonstration

Review recent ROI reports, success stories, and product updates shared with the client to reinforce the value of the SaaS platform.

### Last Value-Added Touchpoint Date

Enter date...

### Value Drivers Communicated

- ☐ New Feature Release Update
- ☐ Quarterly Business Review (QBR) Completed
- ☐ ROI/Usage Report Shared
- ☐ Training/Webinar Invitation Sent
- ☐ Case Study/Best Practices Shared

### Summary of Client Feedback/Sentiment

Write something...

### Attach ROI Report or Performance Summary

 Upload File

### Customer Sentiment Score

- ☐ Promoter (Positive)
- ☐ Passive (Neutral)
- ☐ Detractor (At Risk)

## Renewal Negotiation & Communication

Execute the outreach sequence, including personalized renewal reminders, discount offers (if applicable), and contract amendment discussions.

### Initial Renewal Outreach Date

Enter date...

### Negotiation Strategy Type

- ☐ Standard Renewal
- ☐ Discounted Renewal
- ☐ Tier Upgrade Negotiation
- ☐ Downsell/Contraction Management

### Client Feedback Summary

Write something...

### Communication Channels Used

- ☐ Email
- ☐ Phone Call
- ☐ Video Conference
- ☐ In-Person Meeting

### Negotiation Notes & Objection Handling

Write something...

### Signed Renewal Agreement

 Upload File

### Account Manager Approval

## Churn Risk Mitigation & Escalation

Identify red flags such as low login activity or unresolved high-priority bugs, and trigger the internal retention specialist workflow.

### Risk Level

- ☐ Low Risk
- ☐ Medium Risk
- ☐ High Risk
- ☐ Critical/Imminent Churn

### Primary Churn Drivers

- ☐ Low Product Adoption
- ☐ Budgetary Constraints
- ☐ Competitor Switch
- ☐ Technical/Bug Issues
- ☐ Poor Customer Service Experience
- ☐ Lack of Feature Alignment

### Identified Risk Trigger

Write something...

### Mitigation Strategy Plan

Write something...

### Escalation Deadline

Enter date...

### Account Manager Approval

## Contract Finalization & Billing Update

Ensure all legal terms are signed, payment methods are current, and the subscription period is accurately updated in the CRM/Billing system.

### Contract Effective Date

Enter date...

### Subscription Plan Type

- ☐ Basic
- ☐ Professional
- ☐ Enterprise

### New Contract Value (Annual/Monthly)

Enter a number...

### Payment Method Verified

- ☐ Credit Card
- ☐ ACH/Bank Transfer
- ☐ Purchase Order
- ☐ Invoicing

### Signed Contract Document

 Upload File

### Account Manager Authorization

## Post-Renewal Onboarding & Success Planning

Schedule a post-renewal success call to discuss new feature training and align the client's long-term goals with the updated subscription tier.

### Success Review Meeting Date

Enter date...

### Renewal Account Tier

- ☐ Basic
- ☐ Professional
- ☐ Enterprise

### Target Focus Areas for Next Quarter

- ☐ Feature Adoption
- ☐ User Training
- ☐ API Integration
- ☐ Reporting & Analytics

### Customer Growth Objectives

Write something...

### Account Manager Approval

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🏆 Finish

🔗 Generate Sample Report