

Automated SaaS Metrics Tracking

Implementing automated SaaS metrics tracking

- 1 Connect your billing system to ChartMogul or SaaSOptics by Friday.
- 2 Assign a single data owner to reconcile customer IDs weekly.
- 3 Replace monthly Excel reports with live investor dashboards.
- 4 Audit your billing data for duplicate customer records immediately.
- 5 Choose a metrics tool matching your current billing stack, not future needs.
- 6 Set up automated churn alerts in ProfitWell for real-time notifications.
- 7 Schedule monthly audits comparing billing system data to CRM records.
- 8 Document your data reconciliation process to prevent single-person dependency.
- 9 Calculate your CFO's hourly cost to justify metrics platform ROI.
- 10 Enable automated revenue recognition checks before board meetings.
- 11 Export your first automated dashboard and share with your board.