

CHECKLIST

Unit Economics Modeling with Ai

Building defensible unit economics with AI

- 1 Audit your current CAC and LTV calculations for accuracy within next week.
- 2 Connect your CRM (Salesforce/HubSpot) to an AI modeling tool like Causal.
- 3 Set up daily automated syncs between billing platform and your AI model.
- 4 Hand-audit 10-20 data points quarterly to validate AI model outputs.
- 5 Review and correctly tag all operational costs in your accounting system.
- 6 Run 10+ scenario analyses monthly covering CAC, LTV, and payback variables.
- 7 Train your AI model on business logic—explain seasonal and contextual nuances.
- 8 Document data classification rules and share with finance team every quarter.
- 9 Replace manual Excel spreadsheets with live-integrated AI financial modeling tools.
- 10 Stress-test pricing and retention scenarios using Monte Carlo simulation monthly.
- 11 Review underlying data hygiene and tagging assumptions without exception quarterly.
- 12 Present scenario-based unit economics models to investors before funding conversations.