

Your Six-Month Checklist for Subscription Success



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One of the biggest draws of starting your own subscription-based service or product is the idea of **“set it and forget it”** recurring revenue, turning it into a **“Revenue as a Service”** model. But setting up any kind of business takes work, time, and intention – and avoiding many potential pitfalls along the way.

If only you had a checklist for the must-do items in the first six months of your business...like the one below. Following these guidelines will help you set the stage for success and build a strong foundation for your business:

Your First Month: Laying the Foundation



Month one checklist

- ☐ Define your USP and choose a niche
- ☐ Choose your website platform
- ☐ Choose and set up your payment gateway and merchant account
- ☐ Choose and set up your subscription billing management software
- ☐ Lay your marketing foundation:
 - ☐ Decide what social media channels to use
 - ☐ Choose an email marketing tool
 - ☐ Create content to draw visitors
 - ☐ Stay organized with a marketing calendar

Month one resources:

[5 Questions To Ask Yourself Before You Start A Business](#)

[Bootstrap Your Subscription Business With These 14 Tools](#)

[How to Find Your Ecommerce Subscription Niche](#)

[5 Ways to Develop a Unique Selling Proposition](#)

[A Beginner's Guide to WordPress](#)

[How to Automate Your PCI Compliance](#)

[What to Look for in a Payment Gateway](#)

[Everything You Need to Know About Ecommerce Marketing](#)

[How to Create a Basic, Working Marketing Calendar for an E-commerce Website](#)

[Airtable's Content Production templates](#)

[The Rebilly for WordPress plugin](#)

Three Months In: Automating and Improving Processes



Month three checklist

- ☐ Choose and set up a CRM tool
- ☐ Evaluate your most common processes, looking for things you can fully or partially automate:
 - ☐ Marketing and social media (automating social shares, etc.)
 - ☐ Customer service (creating communication templates, etc.)
 - ☐ Fulfillment and logistics (whether digital or physical)
 - ☐ Customer onboarding (everything that happens while your customer is learning your product)
 - ☐ Customer relationship management and lead nurturing (the communication you have with existing customers, and with leads who haven't converted to customers yet)
- ☐ Create SOPs for the non-automated processes, so you're prepared for delegating and scaling
- ☐ Audit your website and checkout process for usability and to note places where you might lose customers

Month three resources:

[4 Things You Must Look For In Your Ecommerce CRM](#)

[Onboarding: It's Not Just for SaaS Companies](#)

[Top 15 Best CRMs for Small Businesses](#)

[Don't Overlook Standard Operating Procedures: Use These Apps to Put Them in Place](#)

[Automate Your Inbox With These Tips, Tools, and Templates](#)

[15 Customer Service Email Templates to Welcome, Support, Renew, Refund, & Retain Customers](#)

[How to Conduct a Customer Experience Audit](#)

[How to Improve Your Ecommerce Workflow](#)

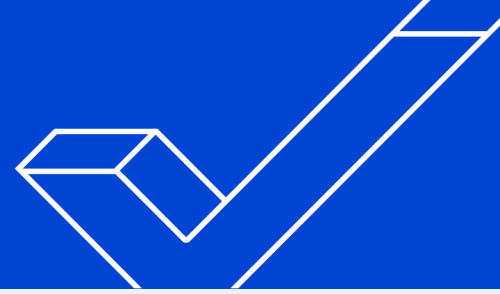
[Increase Customer Loyalty with a Seamless Onboarding Experience](#)

[Customer Experience Audit: Find the Issues Hurting Your Conversions](#)

[How To Conduct An Ecommerce Website Audit Like A Pro](#)

[5 Fundamental Guidelines for eCommerce Usability Design](#)

[Marketing Automation Secrets](#)



Month six checklist

- ☐ Evaluate your hiring needs and weigh employees vs. contractors.
- ☐ Evaluate what's working and what isn't, and try new strategies
- ☐ Revisit your products, plans, and business model by asking yourself the following questions:
 - ☐ As my business has grown, is the base model of it sustainable? Am I finding myself working more hours than I'd like?
 - ☐ Are customers regularly asking for a product or plan that I haven't created yet? Is there a reason not to create it?
 - ☐ Are there things I could add on to create more value (like a monthly group coaching call) that would be an easy upsell for customers?

Month six resources:

Hiring:

[How to Find and Hire a Virtual Assistant and Start Delegating](#)

[How to Build a Better Marketing Team](#) (discusses finding and hiring freelancers, and building a team of mixed employees/freelancers — applicable to all teams, not just marketing)

[Is Your Worker an Employee or Contractor? \[Infographic\]](#)

Evaluating your metrics and refine your marketing:

[How to Track and Reduce Your Involuntary Churn](#)

[How to Use Data-based Marketing Strategies to Boost Your LTV](#)

[Track This, Not That: 6 Metrics That Matter](#)

[10 Ways to Make Pay-Per-Click Ads Pay](#)

[How to Use Content to Reduce Churn](#)

Scaling, and growth:

[14 Important Questions That Will Push Your Business Growth](#)

[How Scalable Is Your Business?](#)

[Scaling Your Business – How Do You Scale Operations?](#)

[Is Your Business Growth on Track? Ask Yourself These Important Questions](#)

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