



Official Workbook

How to Create Your Own SaaS Product

With Thomas McGee

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Module 1

Introduction to SaaS

Introduction

- **Who is Thomas?** Overview and background.
- **Course Goal:** Develop a comprehensive, actionable SaaS product plan.
- **Using this PDF Guide:** Space for notes, action items, and resources.

RESOURCES

 **SaaS Planner**

NOTES

What is SaaS?

- **Definition of SaaS:** Cloud-based software accessed through a subscription.
- **Business Benefits:** Accessibility, lower upfront costs, automatic updates.
- **Key Differences:** SaaS subscription vs. traditional one-time software purchase.

NOTES

Defining Your SaaS Idea

- **Identifying the Problem:** Focus on solving a specific user issue.
- **Market Research & Competitor Analysis:** Identify gaps and unique value.
- **Essential Features:** Prioritize a core set of features for the MVP.

RESOURCES



G2



Capterra



Trustpilot

NOTES



Module 2

Planning and Strategy

Business Model & Monetization Strategies

- **Choosing a Pricing Model:** Free, subscription, freemium, or one-time fee.
- **Tiered Pricing:** Offer multiple options to meet various user needs.
- **Revenue and Costs:** Evaluate long-term viability.

RESOURCES

 App Sumo

NOTES

Market Research & Target Audience

- **Identifying Your Customer:** Profile the ideal user for your SaaS.
- **Validation via Surveys/Interviews:** Confirm demand and pricing with target users.
- **Positioning for a Niche:** Tailor your offering to meet a specific market's needs.

RESOURCES



Google Forms



Typeform

NOTES



Module 3

Building Your Brand Identity

Crafting a Unique Brand Voice and Personality

- **Define Your Tone:** Choose a style that resonates (formal, playful, etc.).
- **Style Guide:** Establish consistency in messaging and communication.
- **User Perception:** Ensure your brand voice aligns with your audience's values.

NOTES

Designing Visual Brand Elements

- **Logo Design:** Simple, scalable, and memorable.
- **Color & Typography:** Select colors and fonts that reflect brand personality.
- **Iconography & Imagery:** Maintain a cohesive visual identity across platforms.

RESOURCES

 [Font Awesome](#)

NOTES



Module 4

Building Your SaaS Product

Minimum Viable Product (MVP)

- **Prioritize Essential Features:** Focus on solving the core problem.
- **Wireframing & Mockups:** Visualize user flow and feature layout.
- **User Feedback:** Plan for early feedback and iterations.

RESOURCES

 Sketch

 Figma

NOTES

Development Options

- **WordPress Recommendation:** Efficient for MVP and rapid development.
- **Additional Options:** Explore no-code tools if WordPress isn't a fit.

RESOURCES

 **WordPress**

NOTES

User Interface (UI) & User Experience (UX)

- **Simplicity & Consistency:** Prioritize ease of use and cohesive design.
- **Smooth Onboarding:** Guide users through essential features.
- **User-Centered Design:** Optimize for accessibility and intuitiveness.

RESOURCES

 [Canny.io](https://canny.io)

NOTES



Module 5

Preparing for Launch

Beta Testing & Feedback

- **Set Up Beta Program:** Define goals and collect feedback.
- **Feedback Analysis:** Look for patterns to improve usability.
- **Iterate on User Input:** Refine product based on real-world use.

RESOURCES



Canny.io



Slack



Discord



Campfire

NOTES

Setting Up Key Business Essentials

- **Domain, Hosting & SSL:** Secure your SaaS with reliable hosting and SSL.
- **Essential Integrations:** Email marketing, CRM, and analytics setup.

RESOURCES

 **Hover**

 **Namecheap**

 **WP Engine**

 **SpinupWP**

 **DigitalOcean**

 **Kit**

 **Mixpanel**

 **Amplitude**

NOTES

Pricing & Payment Processing

- **Payment Processors:** Stripe recommended; add PayPal if needed.
- **Trial Periods & Upsells:** Strategies to increase conversions.
- **Secure Transactions:** Ensure user confidence with reliable processing.

RESOURCES



Stripe



PayPal

NOTES



Module 6

Marketing & Promotion

Creating a Pre-Launch Buzz

- **Landing Page for Email Sign-Ups:** Attract interest and capture leads.
- **Content Creation:** Engage potential users via YouTube videos and social media.
- **Incentivize Sign-Ups:** Offer early access or discounts for sign-ups.

RESOURCES

 Kit

NOTES

Promoting on Product Hunt

- **Launch Strategy:** Choose optimal timing and audience targeting.
- **Engagement on Launch Day:** Actively respond to comments and questions.
- **Follow-Up:** Stay connected with new leads and users.

RESOURCES



Product Hunt

NOTES

General Promotion Strategies

- **Content Marketing:** Create tutorials, case studies, and user stories.
- **Social Media & Content Calendar:** Consistent posting to engage followers.
- **Paid Ads:** Invest strategically based on target audience and budget.

RESOURCES



Advertising on X

NOTES

Email Marketing for SaaS

- **Build Your List:** Nurture leads with Kit.
- **Engaging Campaigns:** Onboarding, updates, re-engagement sequences.
- **Personalization:** Segment for targeted messaging and increased engagement.

RESOURCES

 Kit

NOTES



Module 7

Affiliate Program Development

Why Affiliate Marketing Works for SaaS

- **Customer Acquisition Benefits:** Cost-effective and scalable growth.
- **Choosing the Right Model:** Revenue share vs. flat fees for affiliates.
- **Building Trust:** Affiliates add credibility and reach new audiences.

NOTES

Setting Up an Affiliate Program

- **Commission Structure:** Define fair terms for your affiliates.
- **Reliable Payment System:** Establish clear payment guidelines.

RESOURCES



ReferralCandy



Tapfiliate



PartnerStack

NOTES

Managing and Scaling Your Program

- **Recruit Affiliates:** Target those who align with your brand.
- **Motivate Affiliates:** Offer incentives and exclusive promotions.
- **Continuous Optimization:** Use feedback to enhance your program.

NOTES



Module 8

Post-Launch Growth and Scaling

Retention and Customer Success

- **Retention Strategies:** Focus on value and user engagement.
- **Churn Reduction:** Address common user challenges.
- **Knowledge Base:** Create a self-service library for users.

RESOURCES



MkDocs

NOTES

Scaling Your SaaS

- **Feature Planning:** Use data and feedback to guide development.
- **Infrastructure Scaling:** Ensure servers and databases support growth.
- **Customer Service Scaling:** Expand as demand increases.

RESOURCES



What is sharding?



Groove HQ (Customer Support)

NOTES

Collecting and Analyzing Data for Growth

- **Track Key Metrics:** Monitor MRR, LTV, CAC, and churn.
- **Data-Driven Improvements:** Guide product updates based on usage.
- **Customer Outreach:** Personalize messaging based on insights.

NOTES

Final Tips for SaaS Success

- **Who is Thomas?** Overview and background.
- **Course Goal:** Develop a comprehensive, actionable SaaS product plan.
- **Using this PDF Guide:** Space for notes, action items, and resources.
- **Tools:** SaaS Planner for competitive landscape and initial planning.

RESOURCES



The Ultimate Sales Machine (Book)



Day Trading Attention (Book)

NOTES



Extras

Action Checklist

Defining Your SaaS Idea

- ☐ Identify a specific problem your SaaS will solve.
- ☐ Conduct market research and competitor analysis to pinpoint gaps.
- ☐ Outline essential MVP features that directly address the core problem.

Business Model & Monetization Strategies

- ☐ Choose a monetization strategy (subscription, freemium, one-time fee).
- ☐ Decide if you'll use tiered pricing and feature gating.
- ☐ Calculate estimated costs and revenue projections for financial planning.

Market Research & Target Audience

- ☐ Create a profile of your ideal customer based on demographics and needs.
- ☐ Conduct surveys or interviews to validate demand and adjust as needed.

Crafting a Unique Brand Voice and Personality

- ☐ Define your brand's tone and style to fit your target audience.
- ☐ Create a style guide to ensure consistent messaging across all channels.

Designing Visual Brand Elements

- Design a simple, memorable logo.
- Select a cohesive color palette and typography to reflect your brand.
- Establish guidelines for iconography and imagery for brand consistency.

Minimum Viable Product (MVP)

- Prioritize and finalize essential features for your MVP.
- Create basic wireframes and mockups to visualize user flow and interface.

Beta Testing & Feedback

- Set up a beta testing program with goals for feedback collection.
- Gather feedback from testers, analyze insights, and make usability refinements.

Setting Up Key Business Essentials

- Secure a domain, hosting, and SSL for your SaaS.
- Integrate key tools for email marketing, CRM, and analytics.

Pricing & Payment Processing

- Set up Stripe (and optionally PayPal) for secure payment processing.
- Configure trial periods, discounts, or upsell options as needed.

Creating a Pre-Launch Buzz

- Build a landing page with a clear call-to-action to capture email sign-ups.
- Develop early promotional content (videos, emails, social media) to drive interest.

Promoting on Product Hunt

- Develop a Product Hunt launch strategy with optimal timing and targeting.
- Actively engage with comments and respond on launch day.
- Follow up with new leads and connections after launch.

General Promotion Strategies

- Create a content calendar for consistent posting on social media.
- Implement initial content marketing efforts (tutorials, case studies).
- Set a small budget and run a few targeted paid ads to test conversions.

Email Marketing for SaaS

- Use Kit (or an Email marketing tool of your choice) to set up and segment your email list.
- Create onboarding, product update, and re-engagement sequences.

Setting Up an Affiliate Program

- Select affiliate software like ReferralCandy or Tapiliate.
- Define terms and commission structures for affiliates.
- Set up a reliable payment system and clarify payout guidelines.

Retention and Customer Success

- Develop an onboarding flow to keep users engaged.
- Build a knowledge base for self-service support and common questions.

Scaling Your SaaS

- Create a roadmap for new features based on user feedback.
- Optimize and scale your infrastructure (servers, databases) to meet growth needs.

Collecting and Analyzing Data for Growth

- Track key metrics (MRR, LTV, CAC, churn) regularly.
- Use analytics to guide product updates and targeted customer outreach.

Final Tips for SaaS Success

- Review this checklist to ensure all action items are implemented.
- Set up measurable goals and clear next steps for growth and scaling.
- Continue learning and expanding through recommended resources.