
PERSONAL PRODUCTIVITY / RECURRING SYSTEMS

SaaS: *Cohorts* Tell the Truth

MRR without margin and retention is a mood; the code asset model lives in unit economics and deploy safety.

SYSTEM ARCHETYPE 062

SaaS / *Code Asset* /

SaaS (software as a service) is the recurring code asset: subscriptions as stock, product velocity as flow, churn and support as entropy. Anchor

with modular architecture, stock vs. flow, system sensitivity on pricing and onboarding, and entropy in infra and incident load.

"SaaS is recurring proof—if churn whispers while MRR shouts, believe the whisper."

1. MRR *and Cohorts*

MRR charts seduce; cohort retention and gross margin tell whether the machine breathes or wheezes. When churn spikes, the policy should specify cohorts, NRR, payback months, and cash runway with conservative scenarios. If two engineers cannot deploy safely, pause features. Pair modular systems when billing, auth, and analytics must stay swappable.

Pricing experiments deserve ethics and grandfathering rules customers can predict. Monthly reviews should reconcile security incidents, vendor outages, and regulator questions in regulated niches. Boring uptime funds brilliant roadmap. Read system sensitivity when small pricing or onboarding moves swing LTV.

Product scope creep hides services inside software; boundaries keep margin honest. A serious SaaS dashboard should publish technical debt interest: deploy time, bug backlog, and on-call load. Scope creep is a loan against sleep. Budget entropy for infra bills, failed payments, and silent churn in cohorts.

SaaS is the code asset model: recurring revenue as stock, product iteration as flow, and churn as the quiet tax on both. Before raising burn, verify whether which segments retain versus which inflate vanity signups. MRR without margin is a mood. Draw boundaries between product scope and custom work that hides services inside SaaS.

Infrastructure and observability are not vanity; outages are churn events with press releases nobody wants. The adult version of SaaS is to document assumptions about a competitor price war and your margin floor before discounts become religion. Support tickets are product research—log them. Stress feedback delays between shipping features and seeing churn move.

CAC payback discipline separates growth from gambling; cheap growth that churns is expensive theater. If enterprise deals tempt services, interrogate activation metrics, gross margin, and support hours per thousand users support the story. Churn is feedback with teeth. Run inversion on the roadmap: three features that only grow support debt.

2. CAC *and Payback*

CAC payback discipline separates growth from gambling; cheap growth that churns is expensive theater. If enterprise deals tempt services, interrogate which segments retain versus which inflate vanity signups. Churn is feedback with teeth. Run [inversion](#) on the roadmap: three features that only grow support debt.

Code is an asset when documentation, deploy pipelines, and bus factor survive the founder's vacation. Stress the year by assuming a competitor price war and your margin floor before discounts become religion. Code assets include pipelines and docs. Run [inversion](#) on the roadmap: three features that only grow support debt.

Support load scales with unclear UX and fragile onboarding; invest there before another feature billboard. Second-order thinkers ask how roadmap choices interact with activation metrics, gross margin, and support hours per thousand users support the story. When doubt appears, fix activation before billboards. Read [system sensitivity](#) when small pricing or onboarding moves swing LTV.

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Sketch causal loop diagrams for acquisition, activation, retention, and referral loops.

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3. Product *Scope*

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4. Onboarding *and Support*

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7. Technical *Asset Hygiene*

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SAAS MONTHLY REVIEW SPINE

01

Cohort health

Activation, retention, NRR—by segment.

02

Unit economics

Margin, payback, support cost per user.

03

Roadmap risk

Top three delivery bets and kill criteria.

04

Reliability

Incidents, MTTR, customer-impacting bugs.

8. Atlas *Integration*

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Build the *lattice*, not the legend.

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