

Dynamic Pricing Worksheet

Use this worksheet to determine the proper pricing for your customer's project.

QUANTIFY THE VALUE OF THE OPPORTUNITY

1 QUALIFY: Is \$ in the ATM?
Ensure each of the below options are covered before moving on to step 2.

- ☐ **\$ Money:** Does your client have or can they get money to spend on this issue?
- ☐ **A Authority:** Does your client have the authority to make this decision? Are you talking to the real decision makers?
- ☐ **T Timing:** Does the client believe that this is the right time to proceed with this project?
- ☐ **M Motivation:** Given their busy lives, is the client truly motivated to push this forward? Are the key people motivated to help you more than your competitors?

! If not qualified, quit now and bow out, but use conversation to better position yourself for future work.

2 FOR US
Choose one of the following options, then list the other projects this could lead to in the future.

Is the project a...

- ☐ Paid Selling Effort, or
- ☐ Big Project

What other projects should this lead to?

| PROJECT | % CHANCE OF WINNING | \$ | WHEN |
|---------|---------------------|----|------|
| | | | |
| | | | |
| | | | |

3 FOR THEM - ANCHORING
Answer the following questions before proceeding to step 4.

What value does this project provide for the client?

- What upside or savings will this enable? (Describe in words)
- What upside or savings will this enable? (Estimate in dollars)

4 POSITIONING
Fill in your deal-level positioning statement and rank how bold you'll need to be with it.

What is your deal-level positioning statement?

How bold do we need to be with this?

| | | | | |
|-----|---|---|---|------|
| 1 | 2 | 3 | 4 | 5 |
| LOW | | | | HIGH |

5 CONSIDER ALTERNATIVE PRICING OPTIONS?
Choose up to three of the following options and explain why.

- ☐ Cost +
- ☐ At market
- ☐ Value Bill
- ☐ Contingency-based fees
- ☐ Service Level Guarantee
- ☐ Free

Why?

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PRICING OPTIONS

List your three options starting with desired and rank accordingly. Then, list the required information about each position.

Low Option:

| VALUE | SCOPE | TIMING | FEE & TYPE |
|-------|-------|--------|------------|
| | | | |

Middle Option:

| VALUE | SCOPE | TIMING | FEE & TYPE |
|-------|-------|--------|------------|
| | | | |

High Option:

| VALUE | SCOPE | TIMING | FEE & TYPE |
|-------|-------|--------|------------|
| | | | |

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ONE LAST THING

What "one last thing" should we be prepared to give on?

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FUTURE OPTIONS

Using the information from step 2, further define future options and add them to your proposal.

NOW: (Making Buying More Smarter)

| VALUE | SCOPE | TIMING | FEE & TYPE |
|-------|-------|--------|------------|
| | | | |

LATER: (Position for Next Step)

| VALUE | SCOPE | TIMING | FEE & TYPE |
|-------|-------|--------|------------|
| | | | |

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BUILD EVERYTHING TOGETHER

Answer the following questions and discuss with the customer before putting into writing.

When is the best time to bring up these options?

What's the best way to present the pricing so that the customer can build it with you?