

Pricing Transformation

Identify the opportunity.
Build the evidence.
Execute the highest-value moves.

Based on size of prize / A
value-based engagement

What you receive

Five connected deliverables. Tom works directly with your portfolio company to turn a monetization opportunity into evidence, decisions and execution.

Five deliverables. One commercial goal

01	Size-of-prize financial model	Opportunity baseline, economic exposure and assumptions.
02	Buyer research and willingness to pay	Evidence about buyer needs, choices and price response.
03	Commercial design	Pricing, packaging, segmentation or monetization decisions.
04	Scenario economics and roadmap	Trade-offs, sensitivities and an order of priorities.
05	Direct execution support	Help testing and implementing the highest-value moves.

A commercial decision worth the work

01 The opportunity

A material pricing or monetization question with meaningful economic exposure.

02 The evidence

Buyer research and business economics to support a concrete recommendation.

03 The execution

A defined path to test the change and help your team put it into practice.

The scope follows the decision and the opportunity.

Evidence changes what happens next

01

Identify

Establish the baseline and the questions worth answering.

02

Build

Research buyer choices and design the commercial change.

03

Execute

Test the economics, prepare the rollout and evaluate results.

What changes when you choose Transformation

PRICING UPSIDE REPORT

Management-input assessment.
Conditional financial scenarios.
Priorities and a 90-minute review call.

PRICING TRANSFORMATION

Scoped buyer research.
Commercial design. Financial
model updates. Direct support
with agreed execution.

The larger engagement develops the evidence and supports the commercial change.

Follow one decision through five deliverables

01

Baseline

Define exposure and the initial opportunity.

02

Research

Study buyer needs and price choices.

03

Design

Specify the proposed offer and charging model.

04

Economics

Compare value, costs and realization.

05

Execution

Prepare a bounded test and review the result.

Each output gives your team a basis for the next commercial decision.

Establish the size of the prize

A financial starting point for the engagement, with commercial exposure, candidate opportunities and the assumptions that need evidence.

The starting point

\$100M

Annual revenue

\$20M

Annual EBITDA

Illustrative company: B2B workflow software, negotiated discounts, legacy plans and AI included without a charging hypothesis.

Initial opportunity hypotheses



Initial modeled opportunity: \$7.5M revenue / \$5.0M EBITDA. Hypotheses guide the research; the model is revised as evidence develops.

The assumptions behind a dollar estimate

\$20M

Affected revenue

7%

Net realized improvement

\$1.4M

Incremental revenue

Sample discount opportunity: \$1.26M incremental contribution minus \$280K allocated implementation cost equals \$980K incremental EBITDA.

Net improvement includes adoption, timing and customer response. The cohort allocation addresses overlap.

Define the revenue each opportunity can affect

OPPORTUNITY POOL	AFFECTED REVENUE	NET IMPROVEMENT	REVENUE UPSIDE
Packaging and tiers	\$30M	8%	\$2.40M
Renewal pricing	\$40M	5%	\$2M
Discount discipline	\$20M	7%	\$1.40M
AI and add-ons	\$10M	10%	\$1M

Example refined calculations. Affected cohorts and shared value are allocated before the contributions are summed.

The model develops with the evidence

INITIAL HYPOTHESES

\$7.5M

Revenue / \$5.0M EBITDA



RESEARCH-INFORMED SCENARIO

\$6.8M

Revenue / \$4.3M EBITDA

The research can narrow, change or rule out an opportunity.

See which assumptions need evidence first

MODEL ITEM	INPUT TYPE	WHAT SUPPORTS THE ESTIMATE
Affected revenue	Reported business input	Eligible customer revenue and contract terms.
Net realized improvement	Modeled assumption	Buyer response, adoption and rollout timing.
Contribution rate	Modeled assumption	Delivery and service economics.
Program costs	Modeled assumption	Research, engagement and rollout requirements.

The assumption register distinguishes business inputs from modeled improvement and identifies what would strengthen each estimate.

A baseline you can use to evaluate results

01	Current economics	Identify the relevant customers, realized prices and contribution economics.
02	Business as usual	State what revenue and earnings would plausibly look like without the proposed change.
03	The commercial change	Specify the customers, mechanism and period over which an improvement could occur.

The baseline separates the proposed pricing effect from other business changes.

Agree how the result will be measured

\$26M

**Observed quarterly
revenue**

\$25M

**Estimated revenue
without the change**

\$1M

**Estimated incremental
revenue**

The baseline names the period, affected cohort, measures and comparison. Demand, customer mix and other business changes remain part of the evaluation.

Fictional quarterly comparison. The estimate requires a defensible evaluation design.

An opportunity can leave the model as evidence develops

- | | | |
|----|-----------------------------|--|
| 01 | Buyer evidence | A proposed change fails to address a meaningful customer need. |
| 02 | Commercial economics | Delivery costs or customer response weaken the expected contribution. |
| 03 | Feasibility | Contract limits or operating requirements prevent a credible route to capture. |

Model updates keep attention on opportunities with evidence and a feasible next step.

What the financial model contains

01

Opportunity calculation

Affected revenue, commercial assumptions and allocated contributions.

02

Assumption register

Reported inputs, estimates, evidence gaps and sensitivity to change.

03

Model updates

Revised economics as research, design and pilot evidence become available.

Your team can see what must be true for the modeled upside to be realized.

Build buyer evidence

Research that examines buyer needs, commercial choices and willingness to pay, then connects the findings to the decision your company faces.

A research plan for the decision

20

Buyer interviews

300

Qualified survey respondents

Example design: current buyers and relevant prospects, with 100 survey respondents in each of three need-based segments.

Recruit the people who shape the buying decision

01

Users

Understand the workflow, the problem and what an improved offer would change.

02

Champions

Explore the alternatives, internal evaluation and reasons to support an offer.

03

Economic buyers

Understand approval, budget, commercial trade-offs and decision authority.

Recruitment follows the buying process and the decision the research must inform.

Questions that support a commercial choice

01 Buyer context

What outcome matters, what alternatives exist and who controls the decision?

02 Offer trade-offs

Which capabilities, limits and service levels change the attractiveness of an offer?

03 Price response

How do choices change when a defined offer is presented at different prices?

Recruitment and sample targets are agreed for the specific engagement.

A research instrument built around a defined offer

Consider the offer shown, including its capabilities, limits and terms. At \$900 per workspace per month, how likely would your company be to choose it at the next purchase decision?

Definitely choose

Probably choose

Undecided

Probably not choose

Definitely not choose

Example wording. Offer definitions, choice tasks and response scales are tailored to the research question.

A defined offer

Respondents evaluate the same capabilities and commercial terms.

A relevant decision

The question refers to a real buying role and purchase context.

A controlled comparison

Price and offer presentation follow the agreed research design.

Willingness to pay varies by need

Focused teams



\$200-\$350 middle range

\$250

Scaling teams



\$500-\$1,400 middle range

\$950

Enterprise operations



\$1,200-\$2,200 middle range

\$1,600

Illustrative monthly medians and middle 50% of stated responses for the offers tested. Balanced sample: n=100 per segment; not market-share estimates.

A balanced sample is not the market mix

Illustrative research design: $n=300$, with 100 qualified respondents per need-based segment.

100

Focused teams

100

Scaling teams

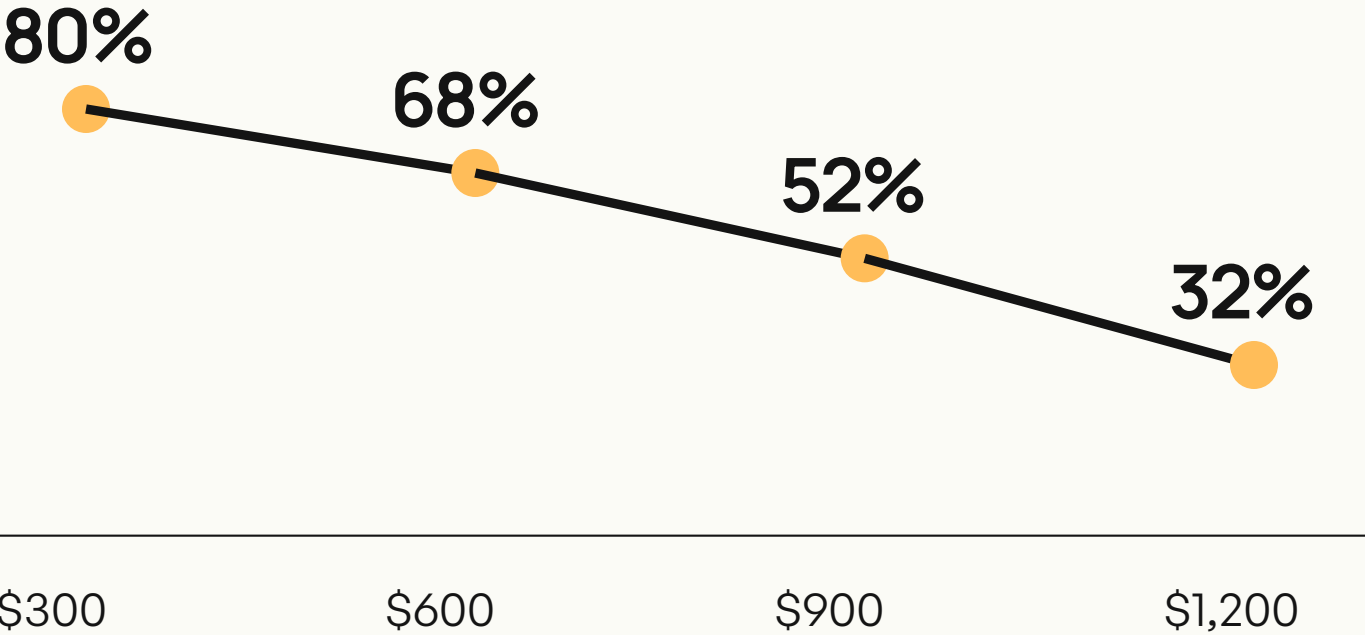
100

Enterprise operations

Equal sample counts let the three groups be compared. The market mix requires relevant population evidence before findings are weighted into a commercial forecast.

What price response can reveal

STATED PURCHASE INTENT / SCALING TEAMS, N=100

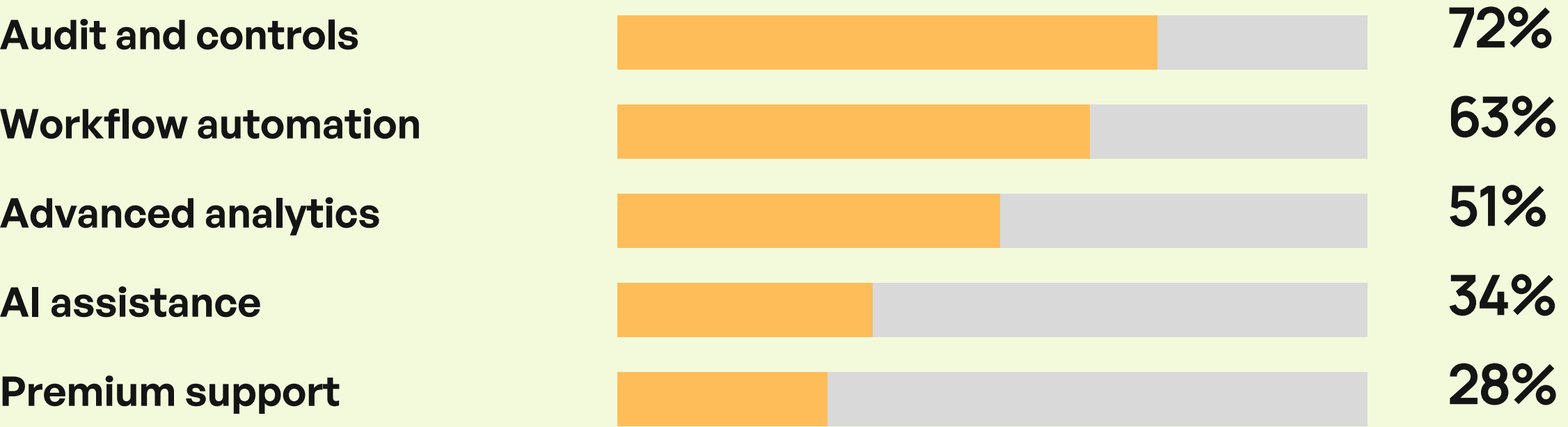


MONTHLY REVENUE PROXY PER PROSPECT

At \$300	\$240
At \$600	\$408
At \$900	\$468
At \$1,200	\$384

Proxy = price x stated intent. It omits delivery cost, retention and real purchase behavior; the commercial hypothesis still requires validation.

Capabilities that influence the choice



Illustrative share selecting each capability as a decision driver, n=300. Multiple selections allowed. Package boundaries require additional trade-off evidence.

Interviews reveal the reason behind the choice

SCALING-TEAM BUYER

“We are buying time back. Additional seats are not the reason we would upgrade.”

ENTERPRISE BUYER

“The approval depends on audit controls and confidence in the rollout.”

Illustrative quotes help explain which value propositions deserve testing.

The interpretation stays close to the evidence

01

Relevant respondents

Qualify buyer roles and use cases, and show who the findings describe.

02

Clear offer definitions

Study choices about a specific offer, with balanced wording and controlled presentation.

03

Multiple evidence sources

Compare survey findings, interview context and observed behavior where available.

Stated willingness to pay informs a hypothesis that behavior can test.

Separate stated preference from purchase behavior

52%

Stated purchase intent at \$900

What the response shows

How the tested offer was received by the sample of scaling-team buyers.

What still needs testing

Actual paid choice, realized contribution and retention after a commercial change.

Illustrative scaling-team sample: n=100. Stated intent supports a hypothesis for behavioral validation.

Trace a recommendation back to the finding

BUYER NEED

Time back

Scaling buyers describe automation and coordination as reasons to upgrade.

PRICE HYPOTHESIS

\$900

52% stated intent implies a \$468 monthly revenue proxy per prospect.

COMMERCIAL TEST

\$899

A Growth offer can be piloted with actual choice, contribution and retention measures.

Fictional example. The price-times-intent proxy guides investigation; the pilot evaluates the commercial hypothesis.

What the research deliverable contains

01 **Buyer and segment profiles**

The needs, alternatives, buying roles and commercial differences that matter.

02 **Price and offer evidence**

Choice patterns, willingness-to-pay estimates and the limits of the evidence.

03 **Commercial implications**

What the findings support changing, what remains uncertain and what to test.

The research supports a recommendation your team can examine.

Make the commercial choice

A recommendation for the relevant pricing, packaging, segmentation or monetization decision, with an economic rationale and a plan to validate it.

Segments that explain different offers

SEGMENT	NEED THAT MATTERS	COMMERCIAL IMPLICATION
Focused teams	A reliable core workflow.	A simple entry offer.
Scaling teams	Automation and team coordination.	A clear paid upgrade.
Enterprise operations	Auditability, approvals and rollout control.	A differentiated control offer.

These segments are hypotheses about buyer needs. The commercial design specifies how to recognize and serve them.

Illustrative package architecture

	CORE	GROWTH	CONTROL
Monthly price	\$249	\$899	\$1,499
Buyer need	Core workflow	Scale workflows	Control operations
Automation	Basic	Advanced	Advanced
Analytics	Standard	Advanced	Advanced
Controls	Standard	Standard	Audit + approvals

Sample price hypotheses per workspace per month. Offer limits, terms and a validation plan accompany the design.

An offer specification your team can evaluate

\$899

Growth / workspace / month

BUYER	Scaling teams.
JOB TO SOLVE	Automation and team coordination.
OFFER	Advanced automation and analytics.
VALIDATION	Evaluate actual choice, contribution and retention in a bounded pilot.

Illustrative offer hypothesis. Limits, terms, exception treatment and the validation plan accompany the agreed design.

Choosing the charging unit

CRITERION	SEATS	WORKSPACES	USAGE
Value alignment	Can lag value	Organizes the offer	Can track value
Budget predictability	Usually familiar	Stable base fee	Needs controls
Delivery economics	May miss usage	Needs safeguards	Tracks some costs
Administration	Existing count	Defined workspace	Requires metering

Illustrative evaluation. Buyer evidence, delivery cost and feasibility determine the recommended charging unit.

Choose which part of the offer should change

PRICE LEVEL

Revisit the amount charged for a defined offer. Evaluate buyer response, realized price and contribution.

OFFER DESIGN

Revisit package boundaries, charging units or upgrade paths. Evaluate which needs justify distinct paid value.

Buyer evidence and economics guide which commercial change deserves testing.

AI pricing includes delivery economics

\$200

Monthly add-on price

\$60

Direct monthly cost

\$140

Monthly contribution

5,000 AI actions x \$0.01 per action = \$50 usage cost.

Add \$10 direct service cost. Contribution margin = 70%.

Illustrative price hypothesis. The design also specifies allowances, overages, cost controls and validation.

Stress-test the AI delivery economics

MONTHLY USAGE	DIRECT COST	CONTRIBUTION	MARGIN
2,500 actions	\$35	\$165	82.5%
5,000 actions	\$60	\$140	70%
10,000 actions	\$110	\$90	45%

BARS SHOW CONTRIBUTION MARGIN

\$200 monthly price; \$0.01 per action plus \$10 direct service cost. No overage charges in this illustration. Allowances and cost controls affect the design.

A policy for deliberate discount decisions

01	Up to 10% / Sales lead	Record the reason and confirm the proposed terms meet the agreed guardrails.
02	10-20% / Commercial lead	Review the economics and the customer commitment offered in exchange.
03	Above 20% / Executive approval	Document the business case, the exception and its implications for future deals.

Illustrative approval bands; management agrees the actual policy.

A plan for existing customers

01 Define eligible cohorts

Identify contract terms, renewal timing and the customers affected by a change.

02 Explain the offer

Prepare the value rationale, transition options and treatment of exceptions.

03 Stage the transition

Start with bounded cohorts and evaluate response before expanding the change.

The commercial design includes how the recommendation reaches customers.

An upgrade has to solve a new customer problem

CORE

\$249

A reliable core workflow.

GROWTH

\$899

Automation and team coordination.

CONTROL

\$1,499

Auditability, approvals and rollout control.

Illustrative monthly workspace prices. The design defines the buyer need, offer boundary and commercial terms at each paid step.

The decision memo connects evidence to action

EVIDENCE

Scaling buyers value automation. The \$900 test price produces the highest stated-intent revenue proxy in the example.

RECOMMENDATION

Pilot a \$899 Growth offer with defined limits. Evaluate actual choice, contribution and retention before expansion.

A recommendation specifies the decision, rationale and remaining uncertainty.

Put a competitor price in the buyer's choice context

01

The alternative

Identify the offers buyers actually consider for the same outcome.

02

The comparison

Examine included capabilities, charging units, quantities, terms and service.

03

The decision

Use the differences to inform your own value proposition and commercial hypothesis.

The recommendation connects the competitive context to buyer choice and your economics.

What your team takes into the pilot

01

Offer specification

The relevant segment, package, charging unit, price and commercial terms.

02

Commercial rules

Discount guardrails, exception treatment and customer transition requirements.

03

Decision rationale

Supporting evidence, economic trade-offs and the validation required for rollout.

The scope covers the designs needed for the agreed commercial decision.

Choose the highest-value moves

Compare the economics, test the assumptions and prioritize the opportunities with a credible path to capture.

The refined financial case

+\$6.8M

12-month incremental revenue

+\$4.3M

12-month incremental EBITDA

Illustrative base scenario, refined after research and commercial design. The opportunity still depends on customer response, adoption, timing and delivery costs.

The earnings bridge

\$5.68M

-\$1.38M

\$4.30M



Incremental contribution

Program costs

Incremental EBITDA

Revenue contributions total \$6.8M. Contribution rates vary by opportunity. Program costs include the assumed engagement and rollout costs.

Revenue does not carry one earnings margin

OPPORTUNITY	REVENUE	CONTRIBUTION RATE	PROGRAM COST	NET EBITDA
Packaging and tiers	\$2.40M	80%	\$480K	\$1.44M
Renewal pricing	\$2M	90%	\$400K	\$1.40M
Discount discipline	\$1.40M	90%	\$280K	\$980K
AI and add-ons	\$1M	70%	\$220K	\$480K

Fictional refined scenario. Revenue totals \$6.8M; incremental contribution \$5.68M; program costs \$1.38M; net EBITDA \$4.3M.

Low, base and high scenarios

LOW

\$4.10M

Incremental revenue

\$2.20M EBITDA

BASE

\$6.80M

Incremental revenue

\$4.30M EBITDA

HIGH

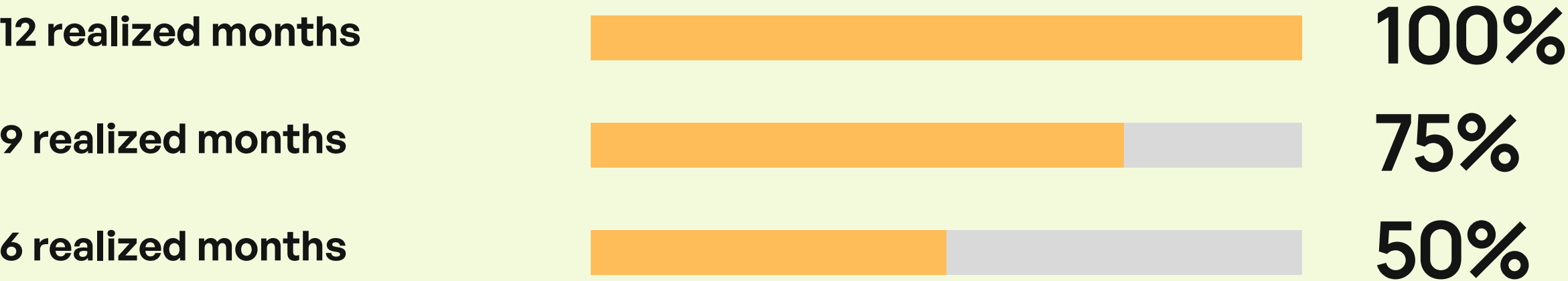
\$8.60M

Incremental revenue

\$5.70M EBITDA

Illustrative scenarios vary adoption, response, rollout timing and costs. They are conditions to evaluate, not assigned probability estimates.

Timing changes the value captured in the year

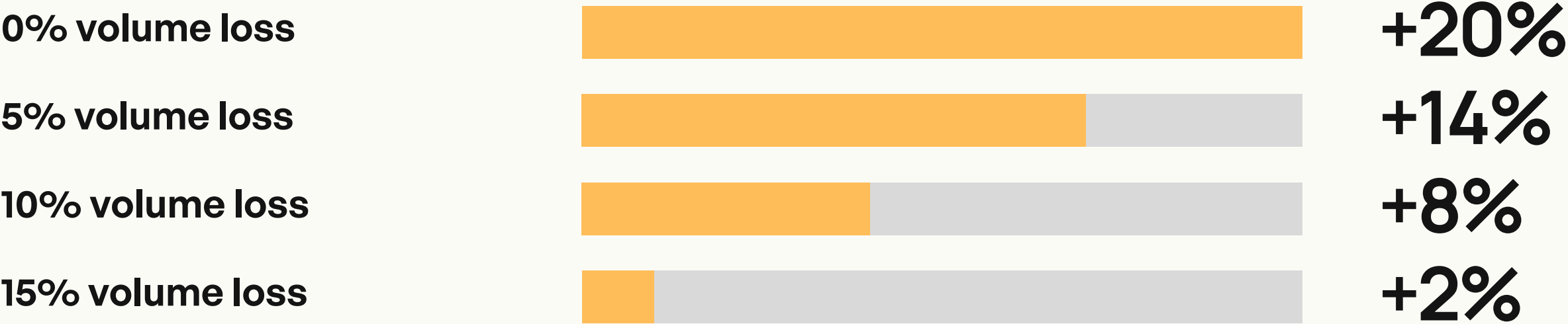


For the same constant monthly opportunity, fewer realized months produce less revenue in the evaluation period.

Illustrative index: no ramp, constant monthly opportunity, same end date. Actual forecasts also reflect adoption, response and cost timing.

Sensitivity to customer response

20% PRICE INCREASE / REVENUE CHANGE FOR THE AFFECTED COHORT



Revenue break-even: 16.7% volume loss. This arithmetic holds other factors constant and does not establish a profit or retention forecast.

Priority considers more than the headline upside

INITIAL ORDER

		REVENUE	NET EBITDA
01	Discount discipline	\$1.40M	\$980K
02	Renewal pricing	\$2M	\$1.40M
03	Packaging and tiers	\$2.40M	\$1.44M
04	AI and add-ons	\$1M	\$480K

Illustrative order balances financial opportunity, strength of evidence, dependencies and feasibility. Contributions are allocated to avoid duplicate value.

The roadmap names the next decision

01	Discounts	Agree the policy, pilot the guardrails, then review realized economics.
02	Renewals	Identify eligible cohorts and contract limits before a transition.
03	Packages	Complete offer validation, prepare sales, then test the new offer.
04	AI and add-ons	Confirm delivery costs, billing readiness and commercial demand.

Each workstream has an owner, prerequisite and decision gate. Calendar dates are agreed in the engagement plan.

Prioritize the bottleneck before the rollout

WORKSTREAM

PREREQUISITE

NEXT GATE

Packages

Buyer trade-offs and offer rationale.

—— **Validate the proposed offer.**

Renewals

Eligible contracts and renewal timing.

—— **Stage the customer transition.**

AI

Use-case costs and billing readiness.

—— **Test the charging hypothesis.**

Example prerequisites connect the priority order to the work required for capture. The engagement plan assigns owners and decision gates.

Put the decision into practice

Tom works with your portfolio-company team on the agreed tests and commercial rollout, with evidence, responsibilities and decision gates kept visible.

Support through commercial execution

01	Working sessions	Resolve commercial choices and the issues that affect implementation.
02	Pilot preparation	Specify the target cohort, offer, measures and decision rules.
03	Rollout readiness	Prepare commercial guidance, customer messaging and operating requirements.
04	Results and decisions	Evaluate what happened and whether to expand, revise or stop.

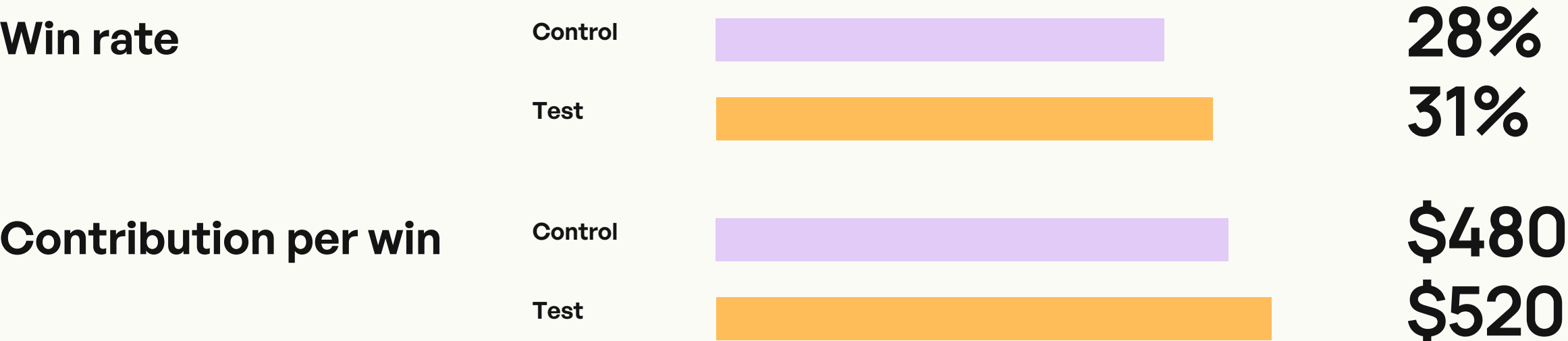
Define success before the pilot starts

MEASURE	WHAT IT DESCRIBES	WHAT TO AGREE
Win rate	Choice among eligible sales opportunities.	Eligibility, comparison and observation period.
Contribution	Economics after relevant delivery costs.	Cost treatment and the unit of comparison.
Retention	Customer behavior after the change.	Follow-up period and evaluation method.
Decision rule	Whether to expand, revise or stop.	Criteria and responsible decision owner.

Sample size, duration, eligibility rules and decision criteria are agreed for the specific test.

Review the pilot before expanding

ILLUSTRATIVE PILOT / 200 SALES OPPORTUNITIES PER ARM



Fictional totals: 56 control wins and 62 test wins. Review uncertainty, contribution and retention follow-up before declaring success or expanding.

Compare contribution per eligible opportunity

ILLUSTRATIVE PILOT / 200 ELIGIBLE SALES OPPORTUNITIES PER ARM

\$134.40 \$161.20 +\$26.80

Control / per opportunity

Test / per opportunity

Observed difference / per opportunity

56 wins × \$480 ÷ 200

62 wins × \$520 ÷ 200

Fictional pilot: 200 opportunities per arm. Descriptive totals require review of allocation, uncertainty, program costs and retention follow-up.

Commercial and operating readiness

REQUIREMENT	OWNER	STATUS
Offer and exception rules	Commercial lead	Ready
Sales and customer guidance	Sales + success	Ready
Billing and contract checks	Operations + legal	Review
Outcome monitoring	Finance + operations	Review

Readiness is a launch condition. The engagement plan assigns operating tasks and sign-off responsibilities.

Turn the pilot into a clear next decision

Expand

The evidence supports the commercial hypothesis and the operating conditions are ready.

Revise

The result identifies an offer, policy or operating issue that can be tested again.

Stop

The evidence or economics do not support proceeding with the proposed change.

The agreed criteria determine the decision. A favorable headline metric is one part of the review.

Evaluate results against a credible comparison

\$26M

**Observed quarterly
revenue**

\$25M

**Estimated revenue without
change**

\$1M

**Estimated incremental
revenue**

The comparison must account for the business changes that would have occurred anyway. The estimate depends on a defensible evaluation design.

A handoff your team can operate

- | | | |
|----|----------------------------|---|
| 01 | Working economics | The model, assumptions and the measures used to evaluate the change. |
| 02 | Commercial playbook | The approved offer, pricing rules, customer treatment and operating requirements. |
| 03 | Ongoing ownership | The responsible roles, review triggers and next decisions after the engagement. |

The work has a defined handoff and an agreed end point.

A defined engagement

Agree the opportunity and scope, build the evidence, make the commercial decision, then support the agreed execution and handoff.

Tom and your team work together

TOM / CURLY'S

Research design and analysis.
Financial modeling.
Commercial recommendations.
Pilot and rollout guidance.
Decision reviews and handoff.

YOUR COMPANY / SPONSOR

Business context and data access.
Buyer access and internal input.
Management approval.
System and operating changes.
Resources and ongoing ownership.

Specific responsibilities and working cadence are agreed in the scope.

What the engagement involves

01 **Scope and success criteria**

Agree the commercial decision, deliverables, boundaries and measures of success.

02 **Inputs and access**

Use management context, relevant business data and buyer access suited to the work.

03 **Working sessions and approvals**

Resolve choices with the responsible team and review evidence at decision gates.

Timing and management effort depend on the research and execution required.

A change in evidence leads to a clear scope decision

- | | | |
|----|------------------------------------|--|
| 01 | Buyer evidence changes | Revisit the offer hypothesis and the commercial work it requires. |
| 02 | Research access changes | Review recruitment, method and the evidence needed for the decision. |
| 03 | Operating readiness changes | Review dependencies, rollout sequence and responsibilities. |

Scope reviews make the effects on deliverables, timing, responsibilities and fees visible.

Direct work with Tom

Ammanuel “Tom” Selameab

Founder, Curly's Consulting

Led pricing at Carta and Sprout Social.
Completed more than 50 pricing engagements.

50+

Questions before you commit

Fit, research access,
management effort,
implementation
responsibilities, customer
risk and value-based pricing.

Fit and research access



Will this work for our business?

The research and commercial work are scoped to your decision, revenue model and constraints. The software examples here illustrate the deliverables.

We already know what to change. Is it useful?

The scope can focus on validating the economics and buyer response, sharpening the design or supporting execution.

Who handles customer research?

Tom leads research design, fieldwork coordination and analysis. Recruiting and buyer-access roles are agreed in the scope.

Execution and customer risk



How do we manage retention risk?

Review contract limits and customer sensitivity. Use bounded cohorts, clear communication and retention monitoring to guide rollout decisions.

Will Tom make changes in our systems?

Tom supports commercial implementation. System configuration and operating responsibilities are explicitly assigned in the agreed scope.

Are the financial outcomes guaranteed?

The model shows conditions and sensitivities. Actual results depend on buyer response, implementation, adoption and costs.

Scope and value-based pricing



What does “priced to the upside” mean?

A custom quote reflects the credible commercial opportunity and the work required. Scope, fee and pricing terms are agreed before the engagement.

Must we buy the Upside Report first?

The transformation includes an opportunity baseline. If you already purchased the \$5,200 Upside Report, its fee is credited toward the engagement.

What is agreed before we start?

The commercial decision, deliverables, research plan, execution support, responsibilities, timing, review points and fee.

Build the evidence. Make the move.

Pricing Transformation

Based on size of prize.

A defined scope and a custom quote.

View the offer: curlysconsulting.com/store/