

Pricing Upside Report

What you receive.

How it works. What is involved.

23 monetization levers + financial scenarios + a 90-minute review call

Everything included in your report

Nine deliverables that help management and the PE team understand the opportunity, choose priorities and decide what to do next.

One company. Nine deliverables.

01 Executive summary

The opportunity, priorities and decisions in one place.

04 Findings by lever

Your responses, the interpretation and next questions.

07 Prioritized recommendations

Where to focus attention and what to validate.

The 90-minute review call is included in the report price.

02 23-lever scorecard

Strengths and gaps in current monetization practice.

05 Revenue opportunity

12-month scenarios with explicit assumptions.

08 90-day action plan

Suggested sequence, ownership and decision gates.

03 Benchmark comparisons

Relevant references and the differences that matter.

06 EBITDA opportunity

Contribution, implementation costs and net upside.

09 90-minute review call

Review the completed report and agree on next steps.

From current practice to the next commercial decision

- | | | |
|----|-----------------------------------|--|
| 01 | Understand the opportunity | The executive summary, scorecard, comparisons and findings establish the starting point. |
| 02 | Assess the financial case | Revenue and EBITDA scenarios connect the findings to exposure, assumptions and potential upside. |
| 03 | Choose the next step | Recommendations, a 90-day plan and the review call help your team decide where to act. |

Each section ahead explains one deliverable and shows what it contains.

A management questionnaire is the starting point

1

Your team supplies context

One knowledgeable respondent describes the business and current monetization practices.

2

The assessment is produced

Responses are assessed across 23 levers and translated into conditional financial scenarios.

3

We review the completed report

A 90-minute call covers the findings, assumptions, priorities and next steps.

The opportunity in one view

A concise summary of the potential upside, the priorities, the important uncertainties and the next management decision.

The size of the prize appears at the start

Fictional company: \$100M annual revenue / \$20M annual EBITDA

+\$7.5M

12-month incremental revenue

+\$5.0M

12-month incremental EBITDA

Illustrative base scenario. The report also shows a range, the assumptions and what needs validation before execution.

The summary puts the next discussion in focus

- | | | |
|----|---------------------------|--|
| 01 | Initial priorities | List-price evidence, discount exceptions and package design. |
| 02 | Key uncertainties | Buyer response, rollout feasibility and financial realization. |
| 03 | Next decision | Which hypothesis deserves validation, and who will own it? |

A shared starting point for sponsor and management

FOR THE PE TEAM

A view of whether monetization deserves a place in the value-creation agenda.

FOR MANAGEMENT

A view of which commercial questions matter and what deeper work would involve.

The summary connects the financial case to a decision the team can make.

See the full monetization picture

A consistent assessment of current decision-making practice, with strengths, gaps and unknowns made visible.

All 23 levers appear in one scorecard

01	Customer segmentation	■ 1/4	13	Legacy-customer migration	■ 1/4
02	Willingness-to-pay evidence	■ 0/4	14	Price-related churn measurement	■ 2/4
03	List-price setting	■ 1/4	15	AI monetization readiness	■ 0/4
04	Competitive-price interpretation	■ 1/4	16	Pricing review cadence	■ 1/4
05	Value-metric alignment	■ 2/4	17	Pricing governance	■ 3/4
06	Packaging architecture	■ 1/4	18	Pricing experimentation	■ 1/4
07	Tier differentiation	■ 2/4	19	Customer economics	■ 2/4
08	Add-on monetization	■ 1/4	20	Monetization monitoring	■ 2/4
09	Discount discipline	■ 2/4	21	Expansion and cross-sell design	■ 1/4
10	Concession exchange	■ 1/4	22	Minimum charges and commitments	■ 2/4
11	Contract economics	■ 3/4	23	Paid services and implementation fees	■ 1/4
12	Renewal pricing	■ 2/4			

Illustrative scores: 0 absent, 1 informal, 2 documented but inconsistent, 3 consistent, 4 consistent and evaluated.

Qualitative practice and quantitative indicators

QUALITATIVE INPUT

Who makes the decision? What evidence informs it? Are policies documented and followed?

QUANTITATIVE INPUT

Approximate coverage, revenue exposure, review frequency and other figures management can report.

The report distinguishes reported figures, practice assessments and model assumptions.

The scorecard separates gaps from established practice

RED / 0-1

Absent or informal practice



13

YELLOW / 2

Documented but inconsistent



8

GREEN / 3-4

Consistent practice



2

Unknown and inapplicable answers are marked separately. A missing answer is not automatically a red score.

A practice score and a financial priority can differ

	PRACTICE SCORE	ILLUSTRATIVE REVENUE OPPORTUNITY	
AI monetization	0/4		\$500K
Discount discipline	2/4		\$900K
Contract economics	3/4		\$250K

Financial exposure, evidence and feasibility also determine the next action.

The framework covers five parts of monetization

Buyer and market evidence

Segmentation, willingness-to-pay evidence and competitive-price interpretation.

Offer and charging design

List prices, value metrics, packaging, tiers, add-ons and AI monetization.

Deal and service economics

Discounts, concessions, contract terms, minimum charges and paid services.

Customer lifecycle

Renewals, legacy migration, price-related churn, expansion and cross-sell.

Decision and execution quality

Review cadence, governance, experiments, customer economics and monitoring.

Put current practice in context

For applicable levers, compare management-reported practice with relevant peer evidence or a clearly stated practice reference.

See the reported position, reference and gap

List-price setting

Revenue covered by a documented review in the last year

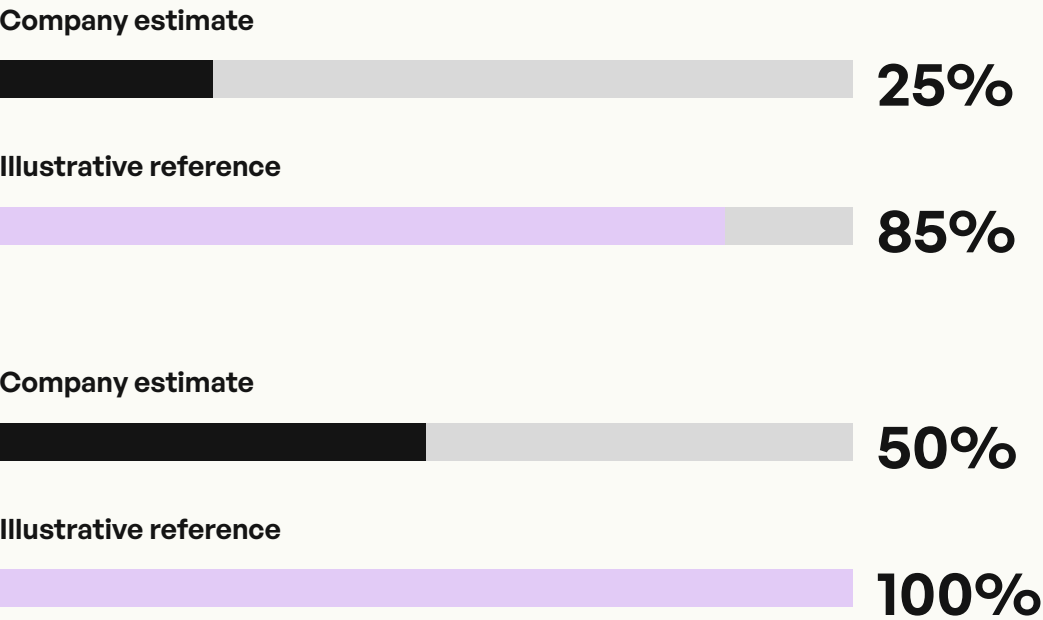
60 percentage-point gap

Discount discipline

Discounted offers requiring a recorded reason

50 percentage-point gap

Company estimates and reference values shown here are fictional. Comparison sources are identified in the actual report.



A useful reference must match the commercial question

01

Business model

A subscription offer and a transaction-based offer can require different comparisons.

02

Commercial complexity

Enterprise negotiation and a standard self-service offer create different decision demands.

03

Reference source

The report explains the cohort, source or practice standard used for the comparison.

Relevance matters more than a headline percentile.

The basis of each comparison stays visible

- | | | |
|----|-------------------------------------|---|
| 01 | Suitable peer evidence | Show the relevant cohort and observed comparison when the evidence supports it. |
| 02 | Disclosed practice reference | Use a stated standard when a suitable peer comparison is unavailable. |
| 03 | Insufficient evidence | Identify the limitation instead of assigning an unsupported percentile. |

A practice gap informs investigation. It does not establish the right price.

Understand what each response suggests

Findings connect what management reported to the commercial issue, the reference comparison and the next question worth investigating.

List-price setting: an outdated rationale merits review

WHAT MANAGEMENT REPORTED

“Our last broad increase was two years ago. Most prices reflect earlier decisions.”

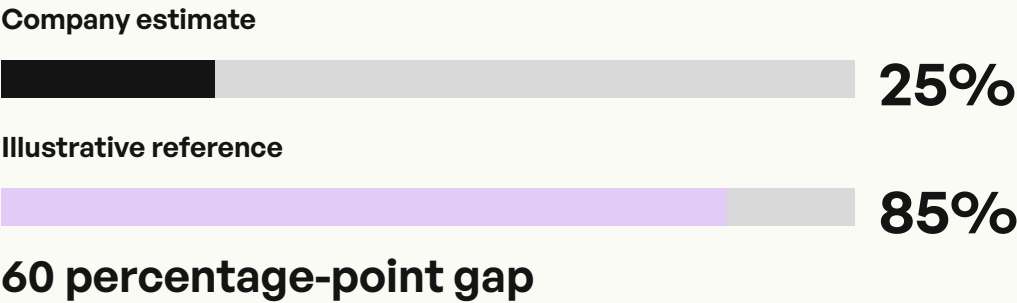
1/4 List-price setting

\$1.20M
12-MONTH REVENUE

\$912K
12-MONTH EBITDA*

WHAT THE COMPARISON SHOWS

Revenue covered by a documented review in the last year



Why it matters: prices may lag changes in value.
Next: what evidence would support a new price?
*EBITDA after allocated program costs.

Discount discipline: approval is only part of control

WHAT MANAGEMENT REPORTED

“Managers approve discounts above 20%.
Reasons are not consistently documented.”

2/4 Discount discipline

\$900K

12-MONTH REVENUE

\$684K

12-MONTH EBITDA*

WHAT THE COMPARISON SHOWS

Discounted offers requiring a recorded reason



Why it matters: exceptions affect realized revenue.
Next: which recurring exceptions need a policy change?
*EBITDA after allocated program costs.

Packaging: feature history may obscure buyer needs

WHAT MANAGEMENT REPORTED

“Most features were added to existing plans as we built them.”

1/4

Packaging architecture

\$650K

12-MONTH REVENUE

\$364K

12-MONTH EBITDA*

WHAT THE COMPARISON SHOWS

Packages with a documented buyer-needs rationale

Company estimate



Illustrative reference



75 percentage-point gap

Why it matters: packages shape what customers buy.
Next: which needs should define package boundaries?
*EBITDA after allocated program costs.

AI monetization: define a hypothesis before rollout

WHAT MANAGEMENT REPORTED

“AI is included in existing plans. We have not established a monetization hypothesis.”

0/4 AI monetization readiness

\$500K

12-MONTH REVENUE

\$280K

12-MONTH EBITDA*

WHAT THE COMPARISON SHOWS

AI capabilities with a documented monetization hypothesis

Company estimate



Illustrative reference



100 percentage-point gap

Why it matters: AI adds value and delivery costs.
Next: what outcome might customers pay for?
*EBITDA after allocated program costs.

Enabling practices support other opportunities

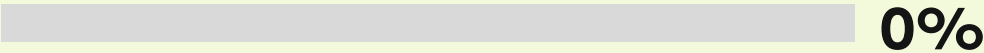
WHAT MANAGEMENT REPORTED

“Sales provided feedback. We have not conducted structured buyer research.”

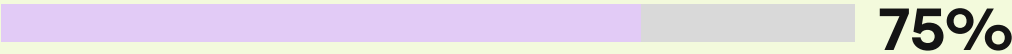
WILLINGNESS-TO-PAY EVIDENCE

Major decisions supported by structured buyer research

Company estimate



Illustrative reference



Supports list-price and packaging opportunities

The financial model includes this value within the commercial opportunities.

Size the potential revenue upside

A 12-month opportunity range, a breakdown of commercial contributions and the assumptions required to realize them.

The report shows a range, not just a single number

LOW CASE

\$4.80M

Incremental revenue

\$3M EBITDA

BASE CASE

\$7.50M

Incremental revenue

\$5M EBITDA

HIGH CASE

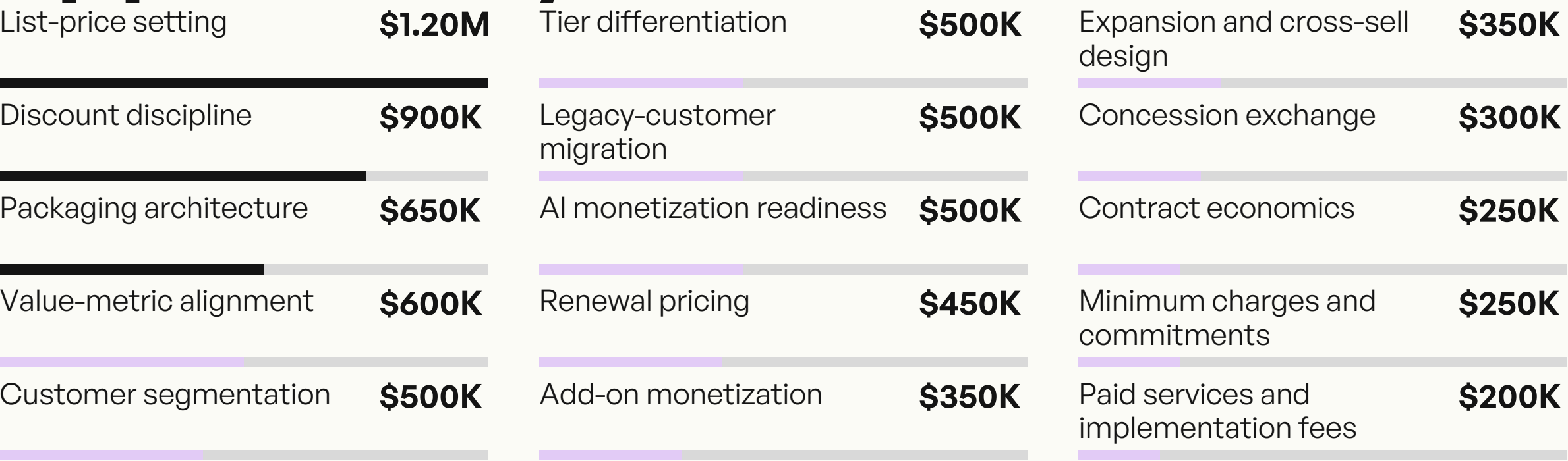
\$9.60M

Incremental revenue

\$6.40M EBITDA

Illustrative scenarios reflect different assumptions for customer response, adoption, timing and costs. They are not probability estimates.

See where the sample revenue opportunity comes from



Contributions are allocated after overlap. Eight enabling levers support capture without receiving duplicate financial credit.

Every estimate has a visible calculation

\$20M

2.5%

\$500K

Affected revenue

Net realized improvement

Incremental revenue

The assumed improvement reflects adoption, rollout timing, customer response and overlap with other actions.

Reported business inputs and modeled improvement assumptions are identified separately.

Overlap is addressed before opportunities are added

\$9.4M -\$1.9M \$7.5M

**Unadjusted opportunity
hypotheses**

**Illustrative overlap
adjustment**

**Allocated revenue
opportunity**

The same customer revenue can be affected by list prices, packages, discounts and renewals. The model allocates shared value before summing the contributions.

The financial case makes the conditions visible

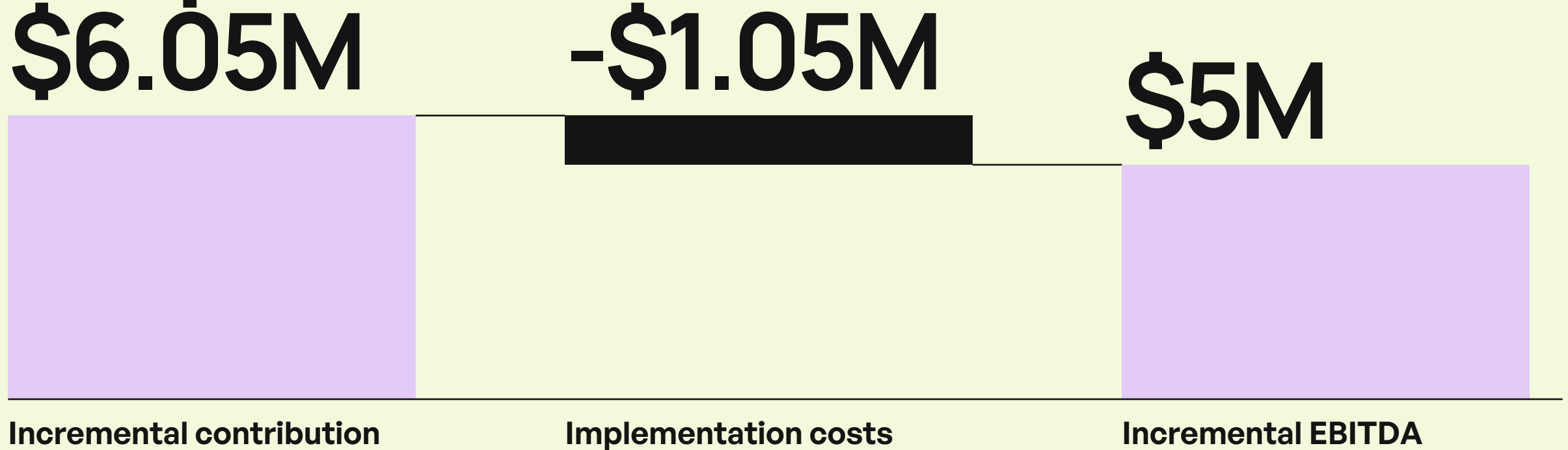
- | | | |
|----|--------------------|---|
| 01 | Exposure | How much revenue is relevant to the proposed commercial change? |
| 02 | Realization | What adoption, response and timing would produce the modeled improvement? |
| 03 | Constraints | Which contract limits, customer risks or operational dependencies could reduce the outcome? |

The scenario helps decide what to validate before committing to a rollout.

Translate revenue into earnings

A view of incremental contribution, the cost of pursuing the opportunities and the resulting potential EBITDA upside.

Contribution and program costs shape the EBITDA case



Illustrative contribution rates: 70%, 85% or 90% by lever. Total program costs are \$1.05M, allocated at 14% of incremental revenue.

Compare revenue and EBITDA by opportunity

ILLUSTRATIVE OPPORTUNITY

	REVENUE	NET EBITDA
List-price setting	\$1.20M	\$912K
Discount discipline	\$900K	\$684K
Packaging architecture	\$650K	\$364K
Value-metric alignment	\$600K	\$336K
Customer segmentation	\$500K	\$280K
Remaining commercial opportunities	\$3.65M	\$2.42M

The model separates inputs from earnings assumptions

- | | | |
|----|---------------------------------|---|
| 01 | Reported starting point | Management supplies approximate revenue, margin and relevant revenue mix. |
| 02 | Contribution assumptions | The scenario estimates how much incremental revenue remains after delivery costs. |
| 03 | Program costs | The model includes assumed implementation costs and shows their allocation. |

A high revenue opportunity can have a different earnings outcome.

Choose where to focus first

Recommendations connect the commercial finding to a proposed action, its financial relevance and what needs to be validated.

See a reasoned order of initial priorities

01	List-price evidence Establish the evidence needed to revisit outdated price levels.	\$1.20M
02	Discount exceptions Standardize reasons and assess recurring exceptions.	\$900K
03	Package design Investigate buyer needs behind package boundaries.	\$650K

Illustrative revenue opportunity. The ranking also considers evidence, feasibility and dependencies.

Priority reflects value and the path to capture it

- | | | |
|----|-------------------------------------|--|
| 01 | Financial exposure | How much revenue could the proposed action affect? |
| 02 | Evidence and uncertainty | Which assumptions have support, and which need a test? |
| 03 | Feasibility and dependencies | Can the team act, and what has to happen first? |

A large estimate can justify investigation before it justifies implementation.

Each recommendation points to a useful decision

- | | | |
|----|-----------------------|---|
| 01 | Finding | What the response and comparison suggest. |
| 02 | Action | What management could investigate or improve. |
| 03 | Validation | What would need to be true before implementation. |
| 04 | Accountability | Which role should own the next decision. |

Recommendations remain connected to your responses

REPORTED CONDITION

Discount reasons vary. Package boundaries lack a buyer rationale. AI has no charging hypothesis.

RELEVANT NEXT STEP

Review exception patterns. Investigate buyer needs. Test an AI commercial hypothesis.

The report recommends the work needed to support a commercial change.

Turn priorities into a sequence

A suggested plan for resolving important uncertainties, assigning responsibility and deciding which opportunities deserve further effort.

A practical sequence for the next 90 days

DAYS 1-30

Confirm the starting point

Review inputs, assumptions and major constraints.

Suggested owner: finance

DAYS 31-60

Evaluate priority hypotheses

Gather buyer evidence and design bounded tests.

Suggested owner: commercial lead

DAYS 61-90

Choose the next action

Review evidence, then expand, revise or stop.

Suggested owner: management

Decision gates keep the plan grounded in evidence

- | | | |
|----|-----------------------------|--|
| 01 | Before a test | Confirm the target customers, commercial hypothesis and success measures. |
| 02 | Before a rollout | Review customer response, retention risk, economics and contractual feasibility. |
| 03 | After implementation | Track adoption, exceptions and results against the original assumptions. |

The report proposes the plan. Validation and execution are subsequent work.

An action plan the team can take ownership of

WHAT THE REPORT PROVIDES

Suggested priorities, sequence, responsible roles and decision gates.

WHAT MANAGEMENT DECIDES

Named owners, available capacity, timing and which initiatives to pursue.

The plan helps you organize internal work or assess whether deeper support is needed.

Review the completed report together

A structured 90-minute call after the report is completed, included in the report price, to discuss findings, assumptions and next steps.

Use the call to work through the decisions

10 min	Confirm context	Align on the business inputs and current constraints.
20 min	Review the findings	Discuss the scorecard, comparisons and key gaps.
20 min	Examine the financial case	Review revenue, EBITDA, assumptions and sensitivities.
25 min	Choose priorities	Discuss recommendations and the 90-day plan.
15 min	Resolve questions	Clarify what to investigate and decide next.

Suggested agenda; emphasis can shift to the questions that matter most to your team.

Leave with a clearer understanding of what to do next

- | | | |
|----|-------------------------------|--|
| 01 | Interpret the report | Understand which findings are significant and which assumptions need more evidence. |
| 02 | Discuss the priorities | Pressure-test the recommended order against your commercial constraints. |
| 03 | Clarify next steps | Identify the decisions, validation work and internal ownership required to move forward. |

The review call helps your team use the report and clarify the work that comes next.

What is involved

A survey-based assessment followed by a written report and a 90-minute review call. Your team supplies the context; the report organizes the opportunity.

From purchase to the completed report and review

- | | | |
|----|----------------------------------|---|
| 01 | 1 / Purchase | Select the Pricing Upside Report for one company on the pricing page. |
| 02 | 2 / Questionnaire | Choose a knowledgeable respondent to complete the management survey. |
| 03 | 3 / Assessment and report | Responses are assessed, financial scenarios are built and findings are prioritized. |
| 04 | 4 / 90-minute review | After completion, review the report, assumptions and next steps together. |

Approximately 30 minutes of management input ~30 minutes

Business context

Revenue model, approximate financial totals and relevant revenue mix.

Current practices

How prices, offers, concessions and monetization decisions work today.

Known constraints

Contract limits, customer sensitivity and operational capacity.

No transaction exports or customer-identifying records are required. Internal clarification may add time.

A clear scope for the initial commercial assessment

INCLUDED IN THE REPORT

Management-input assessment.
Disclosed reference comparisons.
Conditional financial scenarios.
Recommendations and action plan.
90-minute review call.

SUBSEQUENT WORK

Buyer research.
Verified transaction analysis.
Final prices and package design.
Commercial testing and rollout.
Implementation support.

The report is a standalone purchase. A larger engagement is a separate decision.

Questions before you buy

Fit, evidence,
management effort,
the report scope, the
included review call
and the next step.

Will the report fit our company?

Our business is unique. Will this apply?

The assessment uses your revenue model, customer mix and constraints to identify applicable levers and references.

We have done pricing work before. Is this useful?

A prior project is useful context. The report assesses current practices and helps identify the next decisions.

We already know some problems. What does it add?

A consistent view across 23 levers, financial scenarios and a reasoned order of priorities.

How reliable is a survey-based assessment?



Can a questionnaire establish the right price?

It can diagnose reported practices and size conditional opportunity. Buyer response and final commercial changes need validation.

What if we do not know an answer?

Unknowns are made visible. Missing financial inputs can limit or prevent a supported company-specific dollar estimate.

What if relevant peer data is unavailable?

The report states a practice reference or identifies the evidence gap. It does not assign an unsupported percentile.

What is included in the price?

What does the report cost?

\$5,200 for one company, including the nine deliverables and a 90-minute review call after completion.

Does it include implementation?

The report includes recommendations and a suggested action plan. Research, testing and implementation are subsequent work.

Do we have to buy a larger project?

No. The report stands alone. If you choose a Pricing Transformation, the full \$5,200 report fee is credited toward it.

What happens around the review call?

When does the call happen?

After the report is completed. The included session lasts 90 minutes and covers the findings, financial assumptions and next steps.

How should we prepare?

Read the executive summary and note questions about the inputs, priorities and constraints. Include the people who own the next decisions.

What happens after the call?

Your team decides which opportunities to investigate or pursue. Use the recommendations and action plan to organize the next work.

See the offer. Choose your next step.

**Pricing Upside Report
\$5,200 for one company**

**23 levers. Nine deliverables.
A 90-minute review call included.**

View pricing: curlysconsulting.com/store/