

FINANCE · WORKSHEET

Pricing Worksheet

A working document for early-stage SaaS teams to define pricing assumptions, test ideas, and track changes over time.

How to use this: Fill in each section as a team, revisit it whenever a pricing change is considered, and add to the change log every time list price, tiers, or discount policy actually change.

Current Pricing Assumptions

Write down what the current pricing structure assumes to be true. These are the beliefs that, if wrong, mean pricing needs to change.

Who is the primary buyer for each tier, and why would they choose it over the others?

What value metric is pricing tied to, and why was it chosen?

What do we believe about how much customers are willing to pay relative to the value delivered?

What competitor or alternative are we implicitly pricing against?

What assumption, if it turned out to be false, would most change our pricing?

Tier Structure

Tier Name	Target Customer	Price / Value Metric	Why They'd Outgrow the Tier Below

Discount Policy

Set this before the next negotiation, not during it.

Maximum discount a rep can offer without approval

What must be traded for a discount above that threshold (e.g. annual prepay, case study, longer term)

Who approves exceptions beyond the standard policy

Where discounts given will be logged so the whole team can see them

Pricing Experiments to Consider

Not all of these should be run at once. Use this as a running list to prioritise from.

- ☐ Test a new price point on net-new customers only (never repriced existing customers without notice)
- ☐ Introduce or adjust a tier boundary based on observed usage patterns
- ☐ Test bundling an add-on into a higher tier instead of selling it separately
- ☐ Test an annual prepay discount against current renewal rates
- ☐ Interview churned customers specifically about price versus value perception
- ☐ Compare win rates and deal size across reps to see if informal discounting is happening

Before Changing Pricing

- ☐ Confirm the change is based on a specific assumption being tested, not a single deal's pressure
- ☐ Decide whether the change applies to new customers only or existing customers too
- ☐ Draft how the change will be communicated to existing customers, if it affects them
- ☐ Confirm sales and customer success are briefed before the change goes live

Pricing Change Log

Add a row every time pricing, tiers, or discount policy actually change.

Date	What Changed	Reason / Assumption Being Tested	Result Observed (fill in later)

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