Choosing the Right Partner for a Pricing Transformation

A Practical Guide for SaaS, Tech, and AI-Native Companies

Contents

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Introduction

Pricing strategy is one of the highest-leverage decisions a SaaS, tech, or AI-native company makes. It shapes how value is understood, communicated, and captured. It influences product strategy, go-to-market economics, customer behavior, and long-term growth.

And because pricing sits at the intersection of product, finance, engineering, and sales, it requires a level of coordinated judgment that is difficult for internal teams to sustain while running the business day to day.

It is no surprise, then, that many companies decide to bring in external support when they face a pricing inflection point. But once that decision is made, a new challenge emerges: selecting the right partner.

Over the years, after working across several consulting firms, and after many conversations with leaders and investors who have evaluated pricing partners repeatedly, I have seen clear patterns in how these decisions are made. Whether or not it is ever formally written down, companies tend to have a set of criteria against which they compare potential partners. Some of these criteria are more important to the purchasing company than others.

While the relative importance of attributes does (and should) vary from company to company based on their unique needs, this weighting should not be dependent on preference alone. The presence of certain attributes reliably leads to better answers and more successful engagements than others. Anyone who has been around enough engagements can likely pull out the patterns.

But herein lies the challenge. Buyers typically do not know the actual relative importance. They make educated guesses. There are attributes that seem like they should be important, but actually do not move the needle. Equally, some criteria sound like “fluff” or overkill, but they are actually great indicators of quality.

Moreover, partner performance on some specific capabilities can vary hugely, with that performance difference greatly predicting the chance of success, but are treated as if they were simply “table stakes” - a partner either “does it”, or it does not.

A Four-Part Framework for Evaluating Pricing Strategy Partners

Through this guide I aim to educate buyers on what they should prioritize when choosing a pricing strategy partner by (a) listing the criteria that are commonly considered, and (b) grouping them into four categories:

1	2	3	4
Attributes whose importance is commonly overestimated	Attributes that are differentiable but often treated as table stakes	Attributes where importance is consistently underestimated	Attributes that are situationally important

In this context, “differentiation” refers to the spread in capability between firms - whether performing strongly on the criterion produces meaningfully better outcomes than performing adequately.

Each section outlines why the attribute matters, how to think about its real weight in a pricing transformation, and how to pressure-test any firm during evaluation.

My Perspective

Before I begin, I should acknowledge that I run a pricing strategy consulting firm, and a skeptic could reasonably assume that I would elevate the attributes my own firm happens to emphasize. In truth, the reverse is true.

My experiences led me to identify the attributes that consistently matter most in pricing strategy work, and I later attempted to build my own firm around those attributes.

My views have been shaped by working inside four major consulting archetypes: the internal strategy group at RELX, the operator-led commercial advisory firm SBI, the global strategy firm McKinsey, and the specialist pricing boutique I later founded. Working within these different models provided a clear view of their respective strengths, their limitations, and the structural dynamics that shape how they solve problems. That breadth of experience also made it easier to distinguish the attributes that consistently lead to strong pricing outcomes from those that matter far less than buyers tend to assume.

I have since compared these observations with those of private equity value creation leaders and operating partners who support their portfolio companies through similar partner selection decisions. Their independent perspectives align closely with the patterns described in this guide.

With that context, the remainder of this guide evaluates each commonly cited attribute using the four-part framework above.

CONTINUED:

A Four-Part Framework for Evaluating Pricing Strategy Partners

Category	Attribute	Importance	Differentiation	Context
Attributes buyers commonly overweight	**1.1 Industry expertise within a business model**	Overestimated	Low	Vertical familiarity provides comfort, but rarely changes outcomes after initial ramp-up.
	1.2 Operator-led solutioning teams	Overestimated	High	Operator background alone does not predict strategy design capability (even though operators can be excellent).
	1.3 Firm size and scale	Overestimated	Low	Pricing work is delivered by small teams; scale rarely improves quality except in rare multi-team rollouts.
Attributes that are differentiable but often treated as table stakes	**2.1 Quality of analysis**	Correctly important	High	Methods can look similar on paper, but rigor varies massively and shapes downstream decisions.
	2.2 Pricing expertise in the business model	Correctly important	High	Business model fluency accelerates decisions and reduces risk across metric, packaging, and rollout design.
	2.3 Quality and pragmatism of recommendations	Correctly important	High	Strong outcomes require both strategic quality and implementability in the client's operating reality.
	2.4 Senior involvement	Correctly important	High	Senior judgment matters most in framing, synthesis, and key decision moments.
Attributes that are genuinely underweighted	**3.1 Strategic decision-making**	Underestimated	Very high	Pricing rarely yields a single obvious answer; the best teams reconcile ambiguity into coherent recommendations.
	3.2 Clarity of written materials	Underestimated	Very high	Clear materials reduce cognitive load, accelerate alignment, and materially improve decision quality.
	3.3 Operator expertise in implementation and rollout	Underestimated	Moderate	Rollout is where strategies succeed or fail; operator judgment improves sequencing, systems, and adoption.
Attributes that are situationally important	**4.1 Staffing model and team focus**	Context dependent	High	Dedicated staffing can more than double output; part-time models can be fine if pacing is slower.
	4.2 Speed and timeline	Context dependent	Limited	Speed matters in real constraint cases, but artificial deadlines often create harmful shortcuts.
	4.3 Price	Context dependent	Limited	Price is rational when budget is binding, but small fee deltas rarely matter in high-stakes transformations.

1 Attributes Buyers Commonly Overweight

1.1 Industry Expertise within a Business Model

- → **Importance:** Overestimated
- → **Differentiation:** Low

Industry vertical familiarity, such as experience with marketing automation products within SaaS, is one of the most frequently cited reasons for selecting a partner. This should not be confused with business model expertise, such as experience with SaaS or retail pricing, which is a separate and more relevant category.

Vertical expertise provides comfort and a sense of safety. Buyers often feel that if a partner has navigated a similar challenge for a company that looks like theirs, then the partner will be better equipped to navigate it for them. Yet in pricing strategy work, the value of this familiarity is limited. Differentiation erodes quickly, and even when it exists, it does not count for much.

A capable consulting team can usually ramp up on a sub-vertical in as little as two weeks, which most firms do as a matter of necessity. By week three, there is typically no meaningful performance difference between a team with prior vertical exposure and one without it. The advantage is even smaller when only one or two team members have the prior experience, which is often the case. While those individuals can educate others, the time required to transfer the knowledge is not much different from the time a new team would spend gathering the same information through interviews and primary research.

Vertical expertise can appear particularly valuable when the firm has worked for a direct competitor. The assumption is that this experience provides unique insight into the competitive environment. **In practice, this benefit is narrowly constrained.** A firm with integrity will conflict out anyone who has worked with the competitor for at least two years, by which time the information is outdated. High-level, non-sensitive context may be shared, but even that is easy to replicate through guided expert interviews.

Moreover, regardless of prior experience, your consulting team will conduct primary market research specific to your category, your customers, and your value proposition. That work invariably becomes the real fact base, making any early advantage in vertical familiarity negligible by the middle of the project.

Most firms understand this dynamic. But because clients often overweight vertical experience, firms continue to highlight it heavily, which naturally advantages larger firms with long lists of prior engagements.

How to pressure-test it

Ask which of the cited case studies the proposed team personally worked on, and what they learned about the vertical from it that couldn't be learned from an interview with an industry expert. The answers are often illuminating.

Also consider asking what immersion activities the firm will not have to complete that they otherwise would by virtue of their familiarity with the space.

1.2 Operator-Led Solutioning Teams

→ **Importance:** Overestimated
→ **Differentiation:** High

Some boutique firms highlight that the team designing your pricing strategy is composed of former operators. This can sound appealing because it suggests seniority and practicality. It reflects a natural instinct to prefer someone who has "been in your shoes" over what can be perceived as a team of junior consultants from a blue-chip firm.

There is, however, a reason why strategy consultants are usually not operators. Operating well and designing strong strategies rely on different skills, and in practice it is uncommon to find both at a high level in the same individual. **Operating requires judgment accumulated through experience, a practical understanding of systems and constraints, and the ability to make many small decisions quickly based on heuristics**. These strengths develop through time in the role.

Strategy design requires a different set of capabilities. It demands structured thinking, synthesis, abstraction, and the ability to balance competing priorities in a coherent way. These skills are cultivated through repeated exposure to ambiguous problems, rapid pattern recognition, and disciplined problem solving. A junior consultant may not have operating judgment, but they may be far more adept at navigating the analytical and structural work that pricing strategy requires.

Great operators do not often make great consultants, and great consultants do not often make great operators. Each brings significant value, but they excel in different phases of the work. The value of the operator skillset is most felt in the implementation phase of the work (see the later attribute "Operator Experience in Implementation and Rollout"), with a light touch to check for "implementability" sufficient in the design phase.

The recommendation is not to avoid hiring operators for pricing strategy design, as there are many operators who do excellent work. It is to avoid hiring them for pricing strategy design on the basis of their operational skillset alone. The savvy buyer will test that they have the strategic design skillset to complement their operational knowhow.

In that sense, asking an operator to design a pricing strategy is not unlike asking a general contractor to design a skyscraper. They might do a good job, since – having expertly built many buildings others have designed – they have a lot of exposure to good design. But the stakes are high, so it is prudent to involve an architect who specializes in the design itself.

How to pressure-test it

Ask how the team would structure a pricing problem when qualitative and quantitative signals point in different directions. Listen for whether they describe a clear, structured approach for reconciling competing inputs, or rely primarily on personal experience and anecdotes that describe what they did rather than why. The distinction is revealing.

1.3 Firm Size and Scale

- **Importance:** Overestimated
- **Differentiation:** Low

Firm size is often treated as a proxy for capability or stability. It is not uncommon for global firms to tell enterprise clients that they have the scale and infrastructure required to support them.

For pricing strategy work, however, size rarely provides a meaningful advantage. Most engagements are delivered by small, focused teams. Global reach and thousands of consultants do not improve the quality of the work. If anything, larger firms may struggle with continuity because frequent rotation makes it harder to build and maintain deep functional expertise.

There is one legitimate exception. In rare cases, a multi-product or multi-business-unit enterprise may wish to transform pricing across large portions of the organization simultaneously. That scenario may require multiple teams working in parallel, and only a firm with significant scale can accommodate it. Even then, many companies choose to sequence the work rather than run several transformations at once, given how disruptive pricing change can be.

By all means choose a large partner if your business truly requires several teams operating at the same time. But do not assume you need a large firm simply because your business is large.

How to pressure-test it

Ask whether any element of the engagement requires more than one core team. If the answer is no, ask what practical value the firm's broader scale would add to this specific project.

2 Important Attributes Treated as Table Stakes (But Actually Differentiable)

2.1 Quality of Analysis

- **Importance:** Correctly important
- **Differentiation:** High

Clients almost always recognize the importance of analytical rigor. Pricing has an obvious numerical component, and few dispute the value of a robust internal and market fact base. As a result, the "insights" section of most proposals looks remarkably similar across firms. Many firms have learned what a fact base is expected to include, and the proposed methodologies often converge: Van Westendorp, conjoint, value driver evaluation, metric assessment, and so forth. From a buyer's perspective, the question often becomes binary: does the firm include the right analytical components or not?

What is far less visible is the degree to which rigor varies across firms, and how much that rigor shapes downstream decisions. The methodology labels may look identical, but the underlying work can differ substantially. The way survey questions are written to minimize bias, the care taken to clean and validate sample quality, the use of segmentation logic, and the synthesis of insights into hypotheses all contribute meaningfully to the reliability of the analytical output. These distinctions often determine whether insights are actionable, shallow, or misleading.

Even seasoned buyers struggle to differentiate between firms based on proposal materials alone. Methodologies can be explained convincingly by teams that have never run them well, or that have only a surface-level understanding of the analytical techniques they propose. In practice, analytics approached as a checklist activity produce surface-level findings. Analytics conducted with depth and discipline elevate the entire strategic direction.

How to pressure-test it

Ask how the team designs survey instruments to avoid bias, how they decide whether and how to cut insights by segment, and how they combine results from different questions to move beyond surface-level takeaways. The specificity of the response is often the clearest indicator of capability.

2.2 Pricing Expertise in the Business Model

- **Importance:** Correctly important
- **Differentiation:** High

Earlier, I argued that industry vertical experience is often overweighted. Expertise in the underlying business model, however, is correctly valued. Pricing a B2B SaaS platform, a consumption-based data product, a consumer subscription, or a retail catalog requires meaningfully different mental models. While the principles of good pricing travel across categories, the practical realities of designing strategies within different business models do not.

Within a business model, learning a new vertical takes weeks. Learning a new business model can take years.

Clients generally understand this distinction. What is less apparent is how differentiation manifests within the category. Buyers commonly focus on the number of projects a firm has completed in the space. Exposure matters, but repetition alone is not the most important factor. What matters most is the portion of the team that is genuinely fluent in the business model. A SaaS pricing team where every member is comfortable with SaaS pricing, for example, will move faster, make stronger day-to-day decisions, and require less senior intervention than a team where only one or two individuals have meaningful experience.

That fluency shows up in decisions large and small: how to design packaging logic, how to select pricing metrics, how to treat entitlements, how to think about land and expand dynamics, and how to model the commercial impact of alternatives. A team that is consistently on the front foot in these decisions produces better outcomes in shorter timeframes.

How to pressure-test it

Ask each proposed vendor how many pricing engagements within your business model (for example, SaaS or retail) each team member has completed in the past three years. Whenever you hear fewer than two, that individual is learning the model on your project. That may be acceptable for one team member, since consultants must train new recruits, but if it applies to the majority of the team, it is a meaningful risk.

2.3 Quality and Pragmatism of Recommendations

→ **Importance:** Correctly important
→ **Differentiation:** High

The quality of the recommendations is shaped by two equally important factors: the strength of the underlying strategy and the degree to which that strategy can be implemented within your organization. Good pricing recommendations must satisfy both conditions. A design that is theoretically elegant but operationally unworkable delivers little value. A design that is easy to implement but strategically shallow leaves significant value uncaptured. In practice, outcomes hinge on the integration of these two dimensions.

Most professionals can generate recommendations that sound reasonable. A smaller set can create recommendations that are strategically sound. Only the strongest pricing teams consistently produce strategies that balance commercial upside with operational feasibility. This requires not just analytical rigor, but a detailed understanding of product constraints, customer behavior, go-to-market capabilities, and the sequencing required to execute change without disrupting the business.

This integration matters. A well-designed, well-executed pricing strategy can produce material uplift in a short period of time. For a $100M ARR business, a fifteen percent uplift can translate into more than $350M in enterprise value when considering both incremental revenue and valuation multiple. Therefore, a partner that you believe is just 5% more likely to make a recommendation that will generate the desired impact would be worth $17M.

How to pressure-test it

Ask the team to describe a previous engagement. Ask them to explain (a) what options they considered before aligning on the solution and why, and (b) how the client's technical and commercial capabilities influenced the final recommendations.

2.4 Senior Involvement

→ **Importance:** Correctly important
→ **Differentiation:** High

Senior involvement is one of the most reliable drivers of quality in pricing strategy work. Experienced leaders bring stronger judgment, pattern recognition, and synthesis. These capabilities shape the framing, interpretation, and decision-making that determine the trajectory of the engagement.

The challenge is how different firms operationalize that involvement.

Clients frequently experience the classic "bait-and-switch" at large firms: partners and principals who are highly present during the sales process become far less involved once the work begins. They may attend steering committees, but without being embedded in the day-to-day analysis or solutioning. This gap between expectation and reality is a common frustration among buyers.

Some boutique firms respond by positioning a senior-only delivery model, with the team clients met in the proposal doing all of the work. While this avoids the bait-and-switch, it introduces a different set of challenges. When senior operators or senior consultants attempt to run every interview, conduct every analysis, or build every page themselves, two issues emerge. First, clients pay senior rates for tasks that do not require senior time. Second, a single senior resource cannot execute all analytical and operational work at the depth and pace required, which increases the risk that important details are missed or delayed.

Moreover, a buyer should know that in ostensibly senior-delivered models, there may be junior consultants – often contractors – hidden behind the scenes. This allows firms to present the senior people, and use less expensive resources for the analytical work. While there is no fault in this strategically, it does mean that the junior consultants in this scenario still exist, and may be at a lower capability level than those a firm would put directly in front of clients.

The most effective model lies between the two extremes. Senior leaders should be concentrated on the activities where their involvement creates disproportionate value: shaping the problem, guiding analytical design, interpreting ambiguous signals, stress-testing recommendations, and engaging with executives at key moments.

The day-to-day analytical and operational work should be driven by a focused junior team with the bandwidth and attention to detail that the work requires, which gives the senior team the leverage needed to operate effectively. This structure preserves the value of senior judgment without the inefficiencies of over-involvement.

How to pressure-test it

Ask how work will be divided across the team and how many hours senior leaders will commit each week.

- Fewer than 10 hours typically signals insufficient senior involvement.
- More than 20 hours often signals an inefficient model where senior time is substituting for necessary junior leverage.

3 Attributes that are Genuinely Underweighted

3.1 Strategic Decision-Making

- **Importance:** Underestimated
- **Differentiation:** Very high

Many buyers assume that once a firm has produced a solid fact base, the recommendations will follow naturally. That assumption is incorrect. Pricing strategy almost never presents a straight line from insights to answers. Internal analyses and market research narrow the field of options, but they rarely converge on a single, definitive solution. Signals frequently conflict, and the most important questions are often those for which the data is ambiguous.

In this environment, the differentiator is not the data itself but the quality of strategic decision-making applied to it. In this context, strategic decision-making does not simply refer to choosing between pre-defined options. It refers to the ability to structure ambiguous pricing questions into clear components, develop and evaluate real alternatives, and converge on a recommendation that is both commercially strong and operationally workable. In other words, it is as much about generating the right options as it is about selecting between them.

Strong strategic decision-making allows a team to break a complex pricing question into manageable components, establish guiding principles, make reasonable assumptions where ambiguity persists, construct real alternatives, evaluate them rigorously, and reconcile quantitative and qualitative signals into a coherent path forward.

The large global consulting firms tend to excel here. Their generalist model requires strong strategic decision-making disciplines, which is why they can operate credibly across so many fields, not just pricing.

A partner at Kearney once told me, “We do not have trained engineers or architects, but if I asked our team to build a bridge over the Hudson River, I have no doubt they would figure it out.” The point is not the example, but the underlying capability: disciplined strategic decision-making enables teams to tackle problems they have never seen before.

Many boutique firms place less emphasis on these processes because they believe deep expertise makes structured strategic decision-making less necessary. I disagree. Specialization without disciplined strategic decision-making encourages shortcuts. Teams become more susceptible to choosing a familiar solution rather than pressure-testing alternatives. Sometimes the shortcut works. Sometimes it misses the answer entirely.

Distinctive expertise and robust strategic decision-making together produce the best work. But if I were forced to choose only one, I would choose strategic decision-making. Most buyers of pricing consulting would not intuitively rank it that way, yet its impact on outcomes is profound.

How to pressure-test it

Ask the team to describe a time when the fact base was inconclusive and how they determined the path forward. Listen for whether they considered multiple options, evaluated them systematically, and converged on a recommendation based on clear principles rather than intuition alone. If you do not hear rigor, you are unlikely to get to the right answer with this team.

3.2 Clarity of Written Materials

→ **Importance:** Underestimated
→ **Differentiation:** Very high

Many buyers view the quality of written materials – most often PowerPoint – as "fluff" that can be trimmed when budgets are tight. This perception is especially common in smaller companies, where the reflex is to deprioritize anything that looks like formatting or polish. The sentiment is familiar: "We don't need fancy slides. Just give us the answer."

That framing misunderstands what clarity of materials actually is.

If clarity were merely about formatting choices, then the category would indeed reduce to tidiness, color schemes, and fonts. Those elements are aesthetic, and alone they do not meaningfully influence outcomes. But clarity is not formatting. It is a capability.

There is a fine art to structuring information so that it is easy to follow, absorb, and remember. It is one of the most difficult consulting skills to master, and one that takes years of deliberate practice. While AI will increasingly automate analytical work, it is hard to envision near-term automation of strategic communication at this level.

Pricing decisions are cognitively demanding. They require leaders to hold a large volume of information in mind while evaluating multiple options, each with different commercial and operational implications. Many pricing engagements stall not because the answer is unclear, but because the decision-making environment is too complex for stakeholders to process with confidence.

Clear and strategically constructed written materials reduce that complexity. They lower cognitive load, accelerate alignment, and help leadership teams absorb information accurately. This is not about aesthetics. It is about coherence: how facts are sequenced, how tradeoffs are framed, and how decisions are guided.

Finding the right answer is essential. But if stakeholders do not fully understand what the recommendation is, how it works, and why it is better than the alternatives, they will not align behind it. The value of the strategy is diminished before it ever reaches implementation.

Do not underestimate the importance of clear written materials. They are a core driver of decision quality, not a luxury.

How to pressure-test it

Ask for anonymized working materials from a prior pricing project. Not proposals. Actual working problem-solving documents. Evaluate how readily you can consume the materials and understand them.

3.3 Operator Expertise in Implementation and Rollout

- **Importance:** Underestimated
- **Differentiation:** Moderate

One of the recurring paradoxes in pricing work is where buyers choose to value operator expertise. As discussed earlier, operator-led teams are often overweighted in the strategy design phase, where their skills are least aligned with what the work requires. Yet when the engagement moves into implementation and rollout – the phase where operator judgment adds the most value – their involvement is often not prioritized.

Implementation is where pricing strategies succeed or fail. Even the strongest architecture will stall without the practical mechanisms that translate strategy into commercial reality: SKU creation, entitlement logic, packaging transitions, sales enablement, quota design, migration pathways, discount governance, and the sequencing required to land change without disrupting the business. These are not theoretical exercises. They are operational, cross-functional, and deeply execution-heavy.

This is precisely where seasoned operators – former heads of product, pricing, finance, sales operations – create disproportionate value. They understand how decisions flow through systems, where change typically breaks down, how stakeholders react under pressure, and what level of enablement is required for a rollout to stick. Their intuition about sequencing, risk mitigation, and field communication accelerates the change and materially improves the chance of success.

Most buyers do not seek this capability explicitly. They assume implementation support is a mechanical follow-on to the strategy work, or that their internal teams can absorb the recommendations without structured guidance. In practice, implementation is almost always more complex than expected. Without operator-level expertise guiding the rollout, even excellent pricing designs can underdeliver or fail to launch.

Operator expertise does not replace strategic problem-solving. It complements it at the moment when the strategy must be translated into behavior, systems, and revenue. It is an essential capability – and one that is consistently underestimated when buyers evaluate pricing partners.

How to pressure-test it

Ask who on the proposed team has directly owned or led a pricing rollout, what challenges they encountered, and how they overcame them. Look for specificity about systems, stakeholders, sequencing, and field dynamics rather than abstract principles or general statements about implementation.

4 Attributes that are Situationally Important

4.1 Staffing Model and Team Focus

- → **Importance:** Context dependent
- → **Differentiation:** High

Consulting firms operate with very different staffing models. At one end of the spectrum, junior team members are staffed full time on a project, as is common at larger firms. At the other, associates and analysts may split their time across two or more engagements, a model often used by boutiques.

There is no universally right answer. Different models fit different contexts. A full-time team accelerates the work and is indispensable when milestones are tight. A part-time model can be appropriate when the client expects decision cycles to be slow, and when the engagement is intentionally paced over a longer horizon.

But “no universally right answer” is not the same as “it doesn’t matter”. It does. And buyers often underestimate how much.

A fully dedicated junior team will usually drive more than twice the output as a team staffed at 50% within the same time period. Two factors drive this. First, context switching is costly for the people doing the ground-level analysis and synthesis. Senior leaders can often absorb context switching more easily because their involvement is higher-level. Junior consultants typically cannot. When they split their time, they lose the depth of immersion required to build and maintain the analytical logic of the work.

Second, consulting projects inevitably have spikes. Even with careful pacing, certain weeks demand extended hours to push analyses over the line or resolve late-breaking questions. A dual-staffed junior consultant cannot flex as easily. A spike on another project will cut into the hours they owe you, and their ceiling on total hours is fixed. Over the arc of an engagement, this materially affects quality and cadence.

None of this means full-time staffing is always preferable. It means you should know what you are buying. Some teams present as if they are fully staffed when they are not. If the model is part time, that should be explicit, because it should meaningfully affect your willingness-to-pay.

How to pressure-test it

Ask how many projects each team member is supporting and how many hours per week they are committed to your engagement. Low price levels often imply partial staffing.

4.2 Speed and Timeline

- **Importance:** Context dependent
- **Differentiation:** Limited

Speed matters in pricing work, but far less uniformly than buyers assume. Some situations genuinely require fast movement, such as coordinating with a major product launch, an investor process, or a concentrated renewal cycle. In those cases, the timeline should shape the structure of the engagement.

More often, however, urgency is tied to symbolic dates rather than real constraints. Teams anchor to milestones such as sales kickoff or the start of the fiscal year, and feel pressure to "have something ready". These deadlines feel important, but they rarely determine commercial success. In most SaaS and tech businesses, customers renew on a rolling basis, which means pricing can launch in February or April just as effectively as January. The exception is industries with fixed buying windows.

The bigger risk is that artificial deadlines lead to shortcuts. Rushing analysis, compressing problem-solving, or attempting to launch before the organization is ready often reduces impact. It is usually better to get the strategy right than to hit a date that carries no commercial advantage.

How to pressure-test it

Ask what elements of the engagement truly require a fixed deadline and which can flex without harming the outcome. Strong firms will distinguish genuine constraints from artificial ones and will be candid about the tradeoffs created by moving too fast.

4.3 Price

- **Importance:** Context dependent
- **Differentiation:** Limited

Value-based pricing purists would argue that price is consistently overweighted in partner selection. In theory, buyers should focus on the value a firm can create, not the absolute level of fees.

In practice, it is more complicated. As someone who thinks about willingness-to-pay professionally, I am very aware that while it is influenced by value, it is also constrained by budget. Budgets are often fixed in advance and cannot easily be increased, even when the expected value of the work is high.

Finding a $2M house that you love does not stretch a $500K budget. When that is the case, price becomes a real constraint, not a philosophical one.

There are also situations where optimizing for price is entirely rational. Some pricing exercises are narrow, routine, or low stakes. If the organization genuinely needs a "good enough" solution and is not relying on the outcome to drive a major strategic shift, selecting a lower cost firm can be appropriate.

The irrationality arises when buyers overweight small fee differences in high stakes situations where budget is not truly binding. Earlier, in the Quality of Recommendations section, I noted that for a $100M ARR business, a typical 15% pricing uplift can translate into roughly $350M of enterprise value when both incremental revenue and valuation multiple are considered. A partner who is only 5% more likely to deliver that uplift is, in expected value terms, worth about $17M more than the alternatives. Against that scale of impact, choosing a weaker partner because they are $50K–$100K cheaper is optimizing for a fraction of the value at stake.

Complicating matters further, buyers understandably treat price as a signal of quality. When one firm proposes fees of $1M and another proposes $500K, it is natural to assume the first will deliver a higher quality solution. Often, there is some truth to this. Firms tend to price at levels they believe they can defend, and sustained ability to command higher fees usually reflects some combination of brand, track record, and client satisfaction.

However, the relationship is far from perfect. Some firms price at a premium primarily to create a quality signal, even when their delivery model or track record does not clearly justify the uplift. Others carry structural overheads that require higher fees simply to make the economics work, regardless of whether the work itself is better. At the other end of the spectrum, newer or smaller boutiques with limited brand recognition and lighter overhead can offer very strong work at lower price points, either because they have not yet fully calibrated their pricing, or because they are intentionally pricing more aggressively to serve a particular segment of clients.

The flip side is that very low prices should invite equal scrutiny. If one proposal is materially cheaper than others that seem comparable, it is worth asking why. It may reflect a lean and efficient model. It may also indicate partial staffing, reduced analytical depth, or a lack of market power that stems from mixed performance. Price alone does not tell you which it is.

How to pressure-test it

Evaluate each proposal’s fee level alongside the other attributes in this guide: analytical rigor, business model fluency, problem solving, senior involvement, clarity of materials, staffing model, and so on. If a price feels unexpectedly high or unusually low, treat it as a signal to dig deeper, not a conclusion. Document the relative strengths and weaknesses across firms, compare the value each is likely to create, and, if budget is a real constraint, select the partner that offers the highest quality-to-cost ratio within those limits. The goal is not to minimize fees. It is to maximize the value you can afford.

Common Pitfalls in Selecting a Pricing Partner

Companies often overweight intuitive attributes such as industry familiarity, firm size, or operator backgrounds. They frequently underestimate the capabilities that determine the quality of the outcome, such as problem solving, analysis, clarity of communication, and team continuity. They may assume research and problem solving are largely the same across firms, when in practice these capabilities vary significantly.

The most effective buyers anchor their evaluations in the attributes that matter most to decision quality and execution confidence.

Closing Thoughts

Pricing transformations succeed when leaders can see the facts clearly, evaluate tradeoffs honestly, and make decisions with conviction. Those conditions depend less on the familiar selection criteria and more on the quality of problem solving, the clarity of communication, and the focus of the team doing the work.

Most pricing failures are not failures of logic. They are failures of clarity, alignment, or continuity. Selecting a partner who strengthens those foundations materially increases the likelihood that your pricing strategy will be both analytically strong and executed with confidence.

My hope is that this guide helps you understand which attributes matter most, and why. Every company will weigh these factors differently, and there is no universally “right” partner for every situation. What you can control is whether you are solving for the attributes that truly influence the quality and impact of the work. If this guide has helped you clarify those priorities and evaluate partners with greater precision, then it has served its purpose.