Unpacking Token-based Pricing

Masterclass| February 26th, 2026

monevate

During today's session, we will cover four primary topics

01   **Understanding Token-Based Pricing**
Defining token-based pricing and exploring its growing momentum

02   **Designing AI Token-Based Systems**
Key design decisions, and the approach to set prices

03   **Unlocking the Full Strategic Potential of Tokens**
The difference between what token systems *typically* do, and what they *can* do

04   **A Warning on the AI Workload-based Token Bandwagon**
Why you should not blindly imitate the early AI token models

Understanding Token-Based Pricing

Defining token-based pricing and exploring its growing momentum

Token-based pricing is the latest pricing "fad" for AI products...

2019 – 2021
Per-Seat Models

As GenAI started gaining buzz, a lot of startups defaulted to simple and familiar per-seat models.

 Jasper

copy.ai

2022 - 2023
Per-Seat Models

ChatGPT Plus's $20/user/month fee reflected a shift toward predictable pricing over granular usage metering

ChatGPT

Copilot

2024
Hybrids - Usage-tiered licenses & Task-based

Monetizing tasks (e.g., per workflow, per API call) above a quota or threshold grew popular as the pure per-seat model fell out of favor, and vendors wanted to marry subscription flexibility with cost coverage

Microsoft   aws

2022
Consumption-Based Pricing

As AI usage grew, high compute costs undermined margins, allowing usage-based pricing and pay-as-you-go models to grow.

Vertex AI

Microsoft Azure

2023
Outcome-based Pricing

Tying prices to successful results aligned price to value and gave more confidence in ROI

Zendesk

INTERCOM

2024 - 2026
Token-Based Pricing

Flexible token systems gained popularity due to their ability to protect margins and encourage usage of multiple AI products.

salesforce

AssemblyAI

Tokens are not a new concept. They have been around for many years in many different forms.

Travel

Example: Airline Miles

Gaming

Example: Vbucks

Casinos

Example: Casino Chips

Finance

Example: Credit Card Points

They are known by many different names. "Tokens" is just one option of many.

XP

Robux

Units

Bones   Pulse   Energy   V-Bucks   Diamonds

Points   Seeds

Keys   Credits   Tokens   Miles   Orbs

Stars   Gems   Passes

Coins   Chips

Hearts   Mana

Tickets

Bucks   Allowance   Rewards   Bars

Gold

The fad seems to have staying power, with many companies adopting tokens across verticals

AI-Native Apps

OpenAI · Claude · Gemini · runway · IIElevenLabs · clay · Lovable · CURSOR

Traditional SaaS
with AI add-on

salesforce · Canva · Copilot · Adobe · Figma · HubSpot

Overheard just the other day…

"We have decided on our price metric.

*We are going to use **tokens**!"*
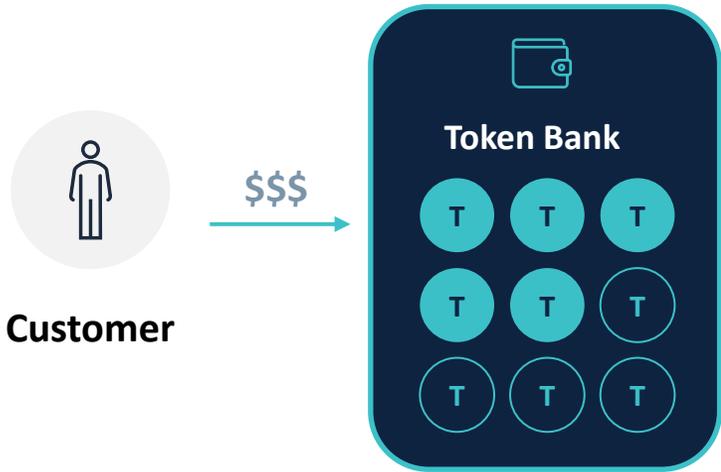
Tech exec

Tokens are NOT a price metric

Tokens are a virtual currency

A virtual currency a way of paying for another price metric

1 **Purchase Layer**
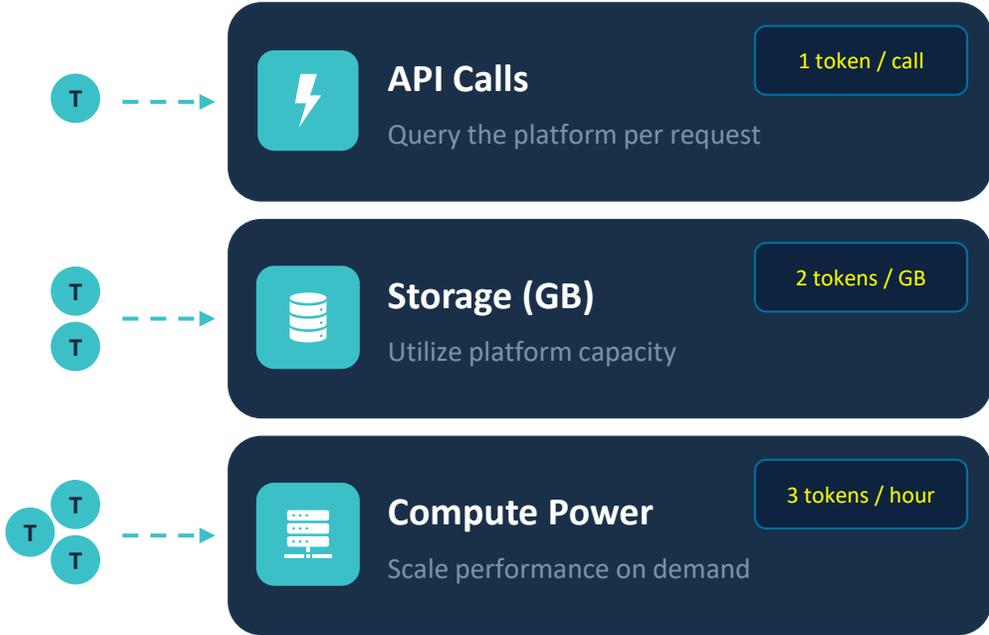
Customer Spends ($$$) to Purchase Tokens

2 **Consumption Layer**

Customer Uses Tokens to Buy Specific Things

Customer → $$$ → **Token Bank** (T T T / T T T / T T T)

API Calls
1 token / call
Query the platform per request

Storage (GB)
2 tokens / GB
Utilize platform capacity

Compute Power
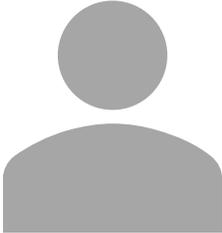3 tokens / hour
Scale performance on demand

Tokens separate purchase from consumption.

Customers commit spend up front, then allocate flexibly.

A decision to "set price based on tokens" is meaningless when taken literally

CUSTOMER

How much will I pay?

Ok. How many tokens do I need?

Well... what can I buy with them?

VENDOR

Depends on how many tokens you buy.

That depends what you're going to buy with the tokens.

I haven't got that far yet...

If you build a token system

you first need to decide on the underlying metric(s)

Perhaps the most important strategic pricing decision you will make

In AI products, tokens are mostly used to buy units of workload, so people have started to associate tokens with workload

AI Product	Customers Purchase…	What These "Tokens" Represent	
Lovable	Credits	Code generation requests	*AI prompts, weighted by code complexity (0.5–2+ credits per prompt)*
salesforce *Agentforce*	Flex Credits	AI actions	*Discrete agent actions (record update, case summary, etc.) at 20 Flex Credits per action*
OpenAI	Tokens	How much text is processed	*Sub-word text fragments (~750 words ≈ 1,000 tokens), billed per million with separate input/output rates*
Copilot	Copilot Credits	Tasks	*Individual AI actions in Office apps (1 credit each) or agent steps weighted by complexity (1–5 credits)*
Adobe	Generative Credits	Image, video, or text outputs	*Individual generative outputs (1 credit per standard image; premium video/audio scaled by length & complexity)*

The BEST
AI workload-focused token models

monetize the quantities of work required to deliver

tangible value or outcomes.

Designing an AI Token-Based System

Key design decisions, and the approach to set prices

To build a token system, you need to make several decisions

Design Decision	**What you need to ask**
Token Value	**How much is each token worth?** Is each valuable action with 1 token, 10 tokens, or 100 tokens?
Purchase Granularity	**Can I purchase the exact number of tokens I want?** Or do I have to purchase in specific increments or "bands"
Volume Discounting	**Is the price per token fixed?** Or does it decrease as the number of tokens increases? To what extent?
Revenue Model	**How do customers buy tokens?** Via recurring commitments tokens capacities? Blocks of tokens that can be "bled down"? Both?
Pool Distribution	**How are tokens distributed across the organization?** Does the entire organization draw from one shared pool, or do they get pre-allocated by team, project, or user?
Allocation Flexibility	**How can tokens be reallocated?** Can they be moved across different users or projects? Can they be reallocated monthly, quarterly, or never?
Token Permanence	**When do unused tokens expire?** Monthly, annually, or do they roll over indefinitely? **Can customers return unused tokens?** Are refunds issued, or are all sales final?

Many AI players are converging around consistent pricing models

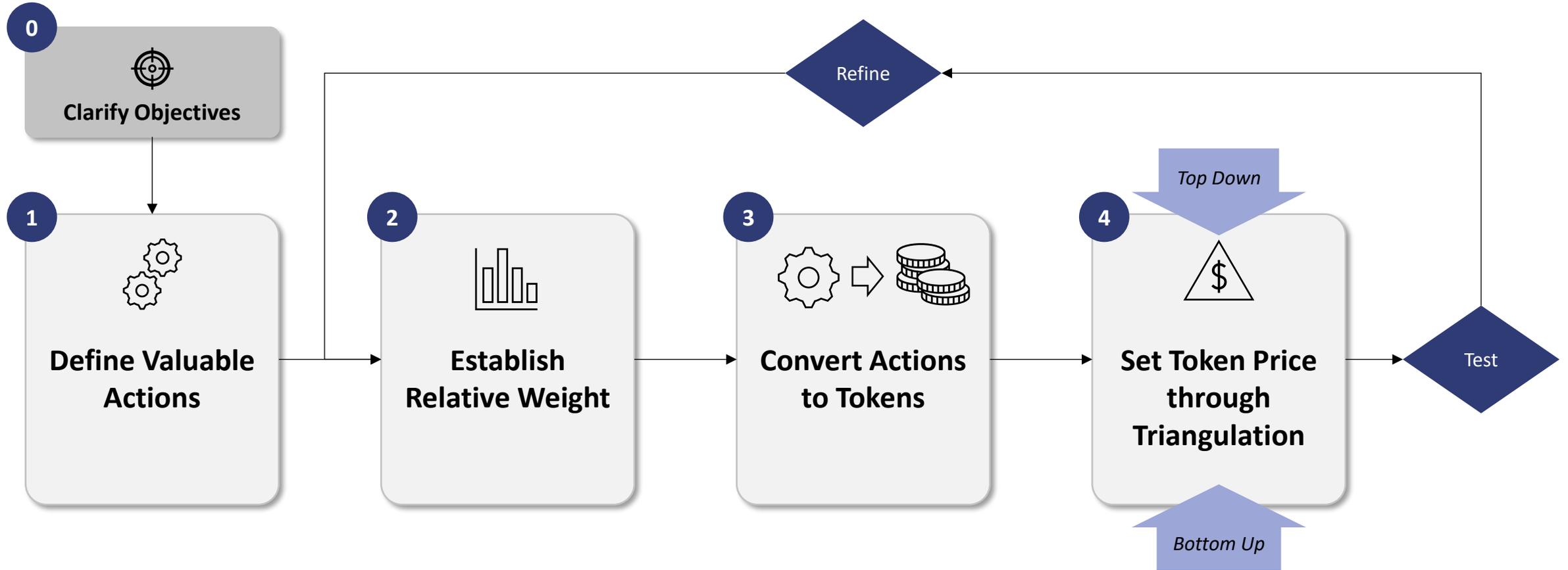| Company	Metric	Revenue Model	Discounting	Token Permanence
Lovable	AI prompts, by complexity	Subscription commit + optional top-ups	Higher tiers cheaper; top-ups premium	Monthly rollovers for 1 month; annual rollovers within term; top-ups valid for 12 months
salesforce	Agent actions by complexity *or* Each 24-hr conversation session	Contracted credit pool (or legacy $/conversation)	?	No rollover beyond contract term
OpenAI *ChatGPT Business/Enterprise*	AI prompts & outputs, by model tier and modality	Seat subscription + pooled credits	?	ChatGPT Biz credits valid for 12 months; Enterprise per contract
Copilot	AI Actions for Office & for Copilot, by complexity	Included credits (consumer) + packs / PAYG (Studio)	?	Resets monthly; no rollover (prepaid)
Adobe Firefly	AI outputs, standard vs. premium	Included monthly credits + add-on packs	Larger packs cheaper	Resets monthly; no rollover
clay	AI Actions, by complexity	Usage-led plans with credit allotment + top-ups	Higher tiers cheaper; top-ups premium	Rolls over up to a 2× monthly cap

? How do you actually build a token architecture, complete with prices and usage/metric conversion?

Monevate's Four-Step Framework for Designing Token Systems

0 Clarify Objectives

1 Define Valuable Actions

2 Establish Relative Weight

3 Convert Actions to Tokens

4 Set Token Price through Triangulation

Refine

Test

Top Down

Bottom Up

Step 0: Clarify Objectives

- **List all objectives you are trying to achieve with your pricing strategy**

- **Rank in order of importance**

- **Translate into more granular "design principles"** – importance-ordered guidelines that clarify the constraints your price structure and levels must be subject to, e.g.
  - *"Number of tokens must be manageable – thousands not millions"*
  - *"Margin must be 20%+ on average"*
  - *Prices must be defensible against Competitor X's prices"*

Objectives

1	Defend market share from free or low-price generic AI alternatives
2	Enable adoption and upsell with limited salesforce intervention
3	Achieve 75% active user penetration

Design Principles

- Actions achievable through generic alternatives will be priced near cost or not monetized

- Some tokens will be provided for free with purchase of platform
- Additional tokens can be purchased in small increments as needed

- Tokens will be pooled across users
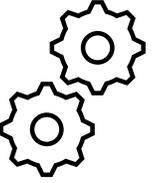
Step 1: Define Valuable Actions

- **List all potentially valuable actions** that a user can complete while using the tool

- Align on **which actions should be monetized**
  - Value
  - Cost risk
  - Availability of alternatives

- **Determine the average compute cost per action**, including likely input / precursor actions

>

Blog Writer Actions	Estimated Action Compute Costs	Monetiz-ation Flag	Estimated Total Compute Costs
Review Content History	$0.0005	No	-
Idea Generation	$0.002	No	-
Drafting	$0.04	Yes	$0.05
Analysis & Recommendations	$0.02	No	-
Apply Recommendations	$0.04	Yes	$0.06
Prep for Specific Platform Publish	$0.015	Yes	$0.015

For example, a user may brainstorm with the tool multiple times before drafting a blog – this iteration should be captured in cost calculations

Step 2: Establish Relative Weight
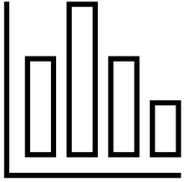
- **Rank monetizable actions in order of value**

- **Assign the most valuable action**
  - a *value* score of 100
  - a *cost* score of 100

- **Score the value and costs of the other actions** relative to those of the most valuable action

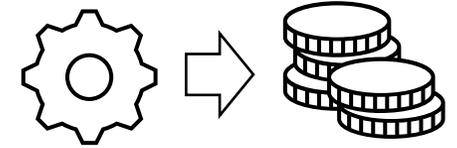- **Assign a final "monetization" score,** balancing value and cost risk**

** Only if cost is material relative to value

Action	Value	Cost	Monetization
Analysis Insight Summarization	100	100	**100**
Forecasting & Scenario Modeling	95	90	**95**
Data Analysis & Visualization	80	65	**80**
Raw Data Extraction	70	**130**	**90**
Data Aggregation & Cleaning	40	50	**40**

Step 3: Convert Actions to Tokens

- **Scale and round monetization scores into practical whole-number multiples**
  - More aggressive rounding = simpler system, less granular differentiation

- **Identify the smallest base unit that evenly divides all rounded weights**

- Set **1 token** = that base unit

- Express all actions **as integer multiples of tokens**

Action	Monetization Score	Rounded	Tokens
Action A	100	100	2
Action B	92	100	2
Action C	61	50	1
Action D	22	50	1

Aggressive Rounding, Limited Differentiation

Action	Monetization Score	Rounded	Tokens
Action A	100	100	5
Action B	92	80	4
Action C	61	60	3
Action D	22	20	1

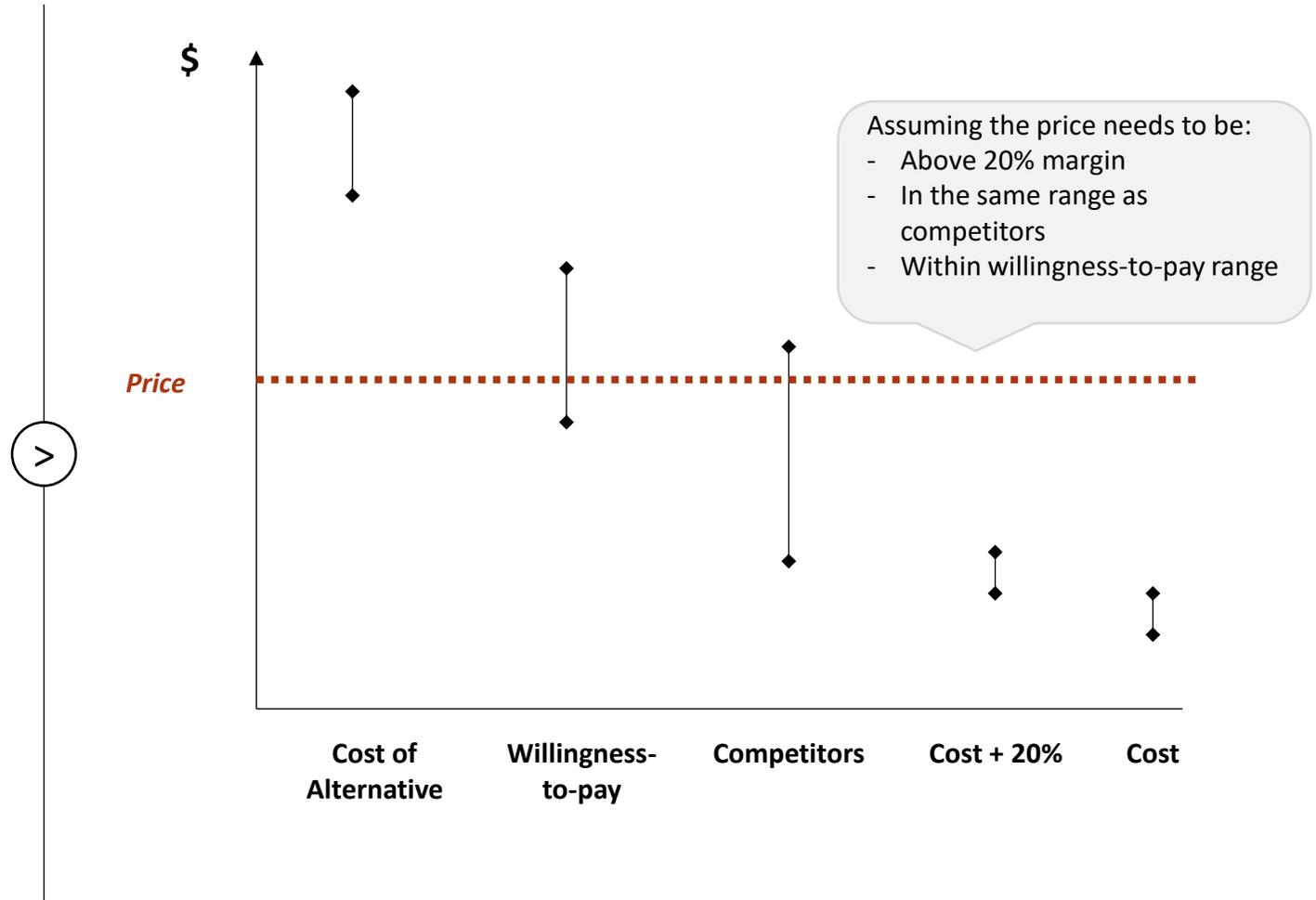*Limited Rounding, Higher Differentiation*

Step 4: Set Token Price through Triangulation
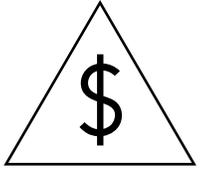
- **Pull multiple reference data points** (bottom up and top down) **for price setting into the same view:**
  - Economic floor, e.g.
    - Cost
    - Cost + X% margin
  - Market reference, e.g.
    - Competitor token prices
  - Economic ceiling, e.g.
    - Willingness-to-pay (top down? See next page)
    - Economic value created
    - Cost of non-AI alternative
  - ...

- **Set price level by** *applying design principles* **to data points**

$

Price ···

Assuming the price needs to be:
- Above 20% margin
- In the same range as competitors
- Within willingness-to-pay range

| Cost of Alternative | Willingness-to-pay | Competitors | Cost + 20% | Cost |

Deriving Willingness-to-Pay per token from macro Willingness-to-pay

Define Customer Archetypes

Define archetypes consistent with **your business's customer base**

(e.g., Industry A vs. B, AI-native vs. AI-nascent)

Estimate Macro Willingness-to-Pay

Use market research and available data to approximate what each archetype would be **willing to pay for *their* maximum usage**

Estimate Usage by Segment

Align internally – via usage data or other resources – on the **expected usage each archetype will use** in a given period.

Translate that to a number of tokens

Set Price per Token

Use Step 2 and Step 3 estimates to **arrive at a price per token that maximizes revenue** (or meets an alternative objective)
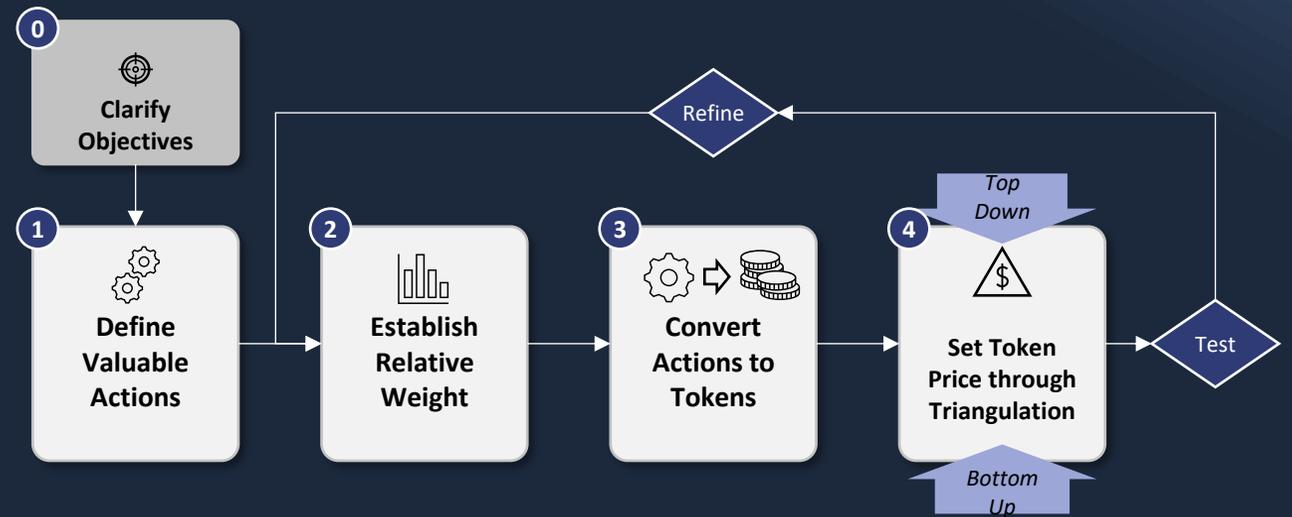
Test & Refine

- **Do not assume your token model is ready after you have run through the process once**

- **Run specific tests to ensure the model is well calibrated.**
  Do the prices make sense for:
  - Each action?
  - Specific customer archetypes (given usage assumptions)?
  - Those archetypes if they only run one type of action?
  - ...

- **If specific outputs do not look right, return to step 2-4 and make adjustments**

>

Refine

Test
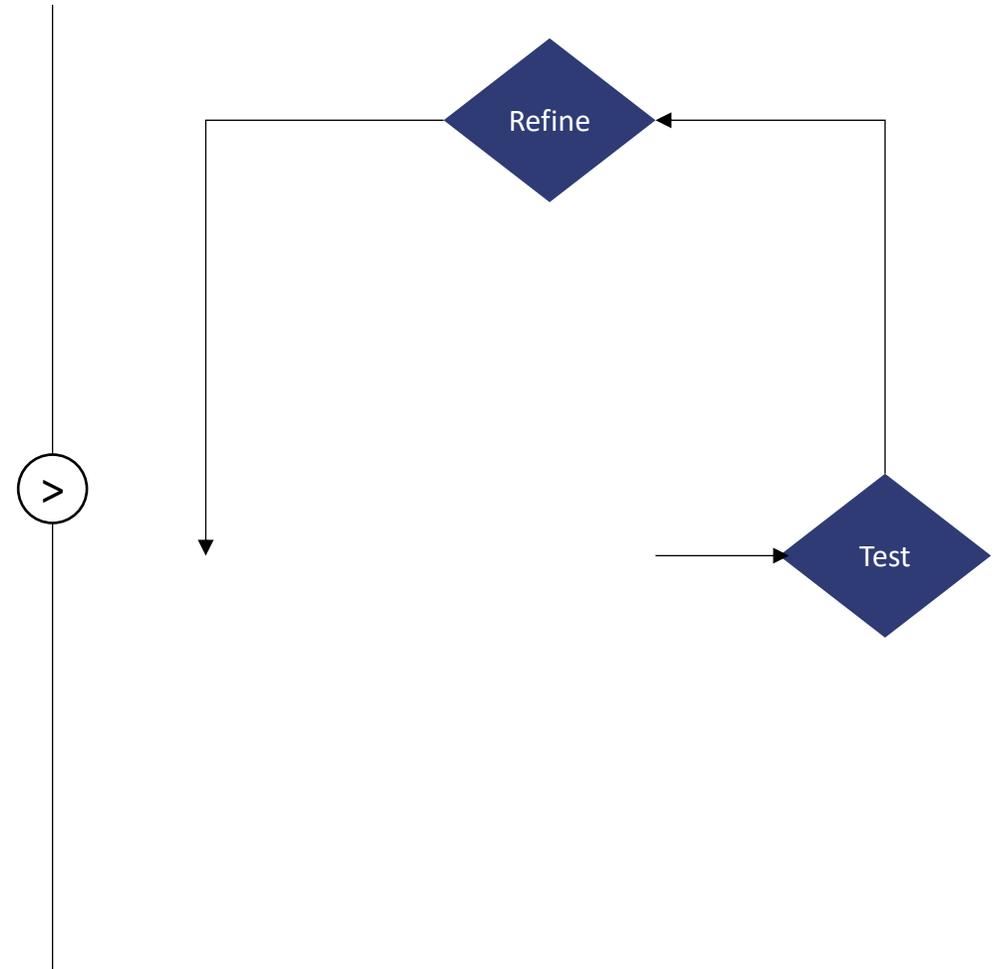
A Practical Process for Designing AI Token Models

This framework gives you

✓ **A structured way** to translate value into tokens

✓ **A defensible method** for setting token prices

✓ **Alignment between economics, usage, and strategy**

✓ A model you **can iterate and refine** over time

0 Clarify Objectives

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Top Down

Bottom Up

Refine

Test

One caution – implementing tokens is technically demanding

Action Instrumentation

- Track every monetized action in real time
- Handle retries, failures, partial completions
- Prevent double-counting or missed events

Conversion Logic

- Translate actions into token consumption
- Apply conversion ratios consistently
- Handle rounding rules and edge cases

Balance & Depletion Engine

- Maintain accurate token balance per customer
- Decrement balances instantly and reliably
- Prevent negative balances unless allowed

Billing & Replenishment

- Support purchases, subscriptions, top-ups
- Credit accounts correctly and immediately
- Handle refunds, expirations, rollovers

Customer Communication

- Surface remaining balances in-product
- Notify customers before depletion
- Avoid surprise shutoffs

Unlocking the Full Potential of Tokens

The difference between what token systems *typically* do, and what they *can* do

Token systems provide benefits at 3 different levels

Levels of Token-model Benefits

Level 1
Viability

1	**Reduce usage hesitation**	Spend separated from usage
2	**Make intangible metrics tangible**	1 token is better than 3,623 "tasks"
3	**Blur weak value-alignment**	Shift focus away from the underlying metric

Level 2
Optimization

4	**Accelerate cash collection**	Currency must be purchased before being spent
5	**Align fixed budgets with variable needs**	Subscribe to a capacity; not a particular service

Level 3
Enhancement

6	**Enable value-aligned multi-metric pricing**	Allocate spend across distinct value drivers
7	**Drive cross-sell via pooled capacity**	Reallocate spend across products over time
8	**Increase platform lock-in via pooled purchasing**	Prepaid ecosystem commitment

Case Study 1: Tokens for data management player

Situation

Company Context

Data management player.

Multiple related products applicable to most buyers.

Key Challenges

× Low cross-sell

× Customers tend to buy "point solutions"

× Granular packaging creates complicated sale

× Tough to scale prices down for smaller mid-market customers

Token Model

Overview

The product is sold as a unified, monolithic platform, but is structured into distinct sub-products.

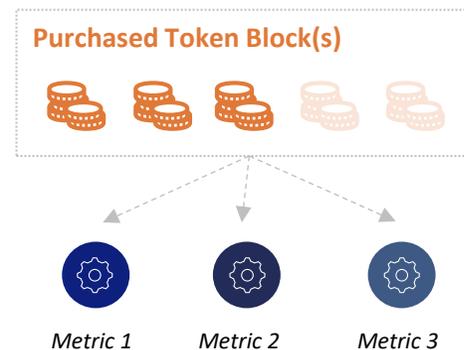Each sub-product is aligned to a different value-based usage metric.
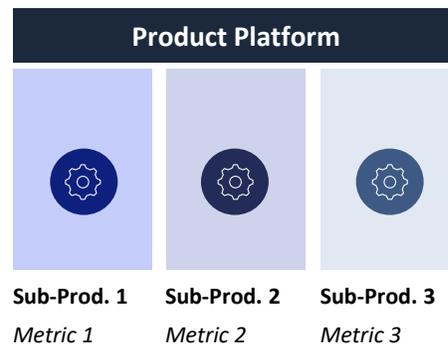
Customers subscribe to tokens that can be flexibly deployed to access platform capacity.

Tokens are sold in blocks to provide headroom beyond immediate needs, enabling customers to test or trial new products using "spare" capacity.

Allocations can be adjusted quarterly.

Product Platform

Sub-Prod. 1	Sub-Prod. 2	Sub-Prod. 3
Metric 1	*Metric 2*	*Metric 3*

Purchased Token Block(s)

Metric 1   Metric 2   Metric 3

Benefits

✓ **Increased adoption** via low entry price point

✓ **Higher price points** overall, via value-based metrics per product area

✓ **Drastically increased** cross-sell

Case Study 2: Tokens for market research vendor

Company Context

Market research service provider with "Qualtrics-like" research platform to supplement services.
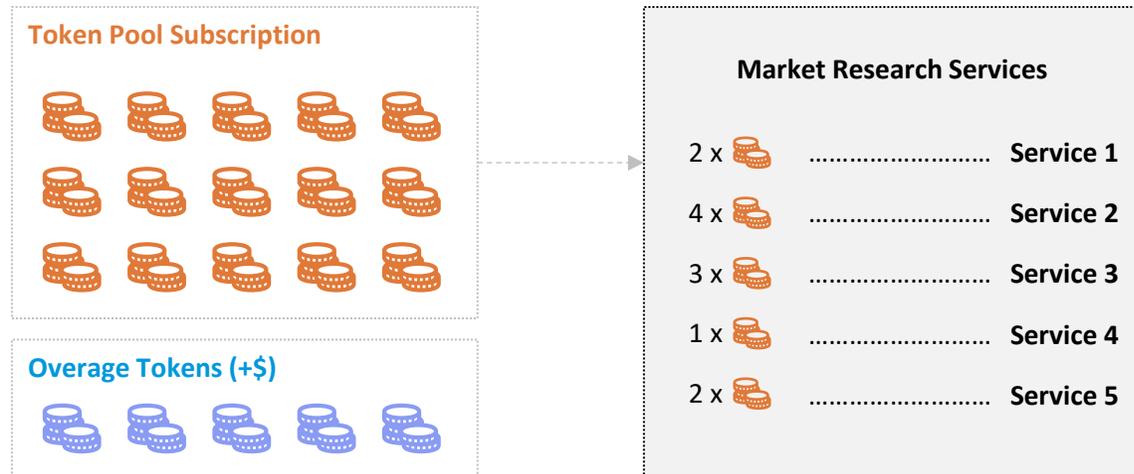
Key Challenges

× Transactional instead of recurring revenue

× Price competition, reduced margin & high churn driven by a crowded market and commodification of services

× Packages don't work – customer budgets stay fixed, but needs vary

Overview

Customers subscribe to a pooled allocation of tokens, with volume-based discounts tied to their minimum expected spend.

They use these tokens to access market research services priced in token units and can "top up" with additional, undiscounted tokens as needed to cover incremental usage.

Token Pool Subscription

Overage Tokens (+$)

Market Research Services

2 x .... **Service 1**

4 x .... **Service 2**

3 x .... **Service 3**

1 x .... **Service 4**

2 x .... **Service 5**

Benefits

✓ **Disaggregates purchase from spend,** making it less likely that the customer will question the price of their market research services

✓ **Leverages fixed MR budgets** while accommodating shifting spend needs over time

✓ **Drives greater share of wallet** by incentivizing larger token commitments and deeper platform adoption

Most AI token systems only operate at the lowest level

Levels of Token-model Benefits

Most AI workload-based token systems

Level 1
Viability

1 Reduce usage hesitation	☑
2 Make intangible metrics tangible	☑
3 Blur weak value-alignment	☑

Level 2
Optimization

4 Accelerate cash collection	☑
5 Align fixed budgets with variable needs	☐

Level 3
Enhancement

6 Enable value-aligned multi-metric pricing	☐
7 Drive cross-sell via pooled capacity	☐
8 Increase platform lock-in via pooled purchasing	☐

This does not mean they are *"wrong"* or *"bad"*

But it means they could be doing *more*

If you're <u>not</u> getting meaningful benefits…

… tokens merely make your pricing strategy *more complex and more opaque* without any upside!

A Warning on the AI Workload-based Token Bandwagon ⚠️

Why you should not blindly imitate the early AI token models

I see issues with the way tokens are being used in the majority of AI pricing models

Issues

① **Tokens are used to approximate workload, which is not always linked to value**

② **Tokens are often designed to cover the cost to serve rather than sources of value**

Not Value-based Pricing

Given the trend of pricing fads, I think we will see companies copying the token models of successful companies

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salesforce
AssemblyAI

Loveable is one of the early breakout successes with an AI workload-based token model

- Culturally-dominant **vibe-coding platform**

- **Highly successful**
  - Unicorn status: $6.6B valuation (Dec 2025)
  - Reached $100M ARR within 8 months of launch. Now at $330M

- Uses a **workload-based token model**:
  - Tokens spent on **prompts**; more complex prompts = more tokens
  - Subscribe to monthly tokens at a discount
  - "Top up" transactionally at a premium
  - Tokens attractively priced

The contradiction

Loveable's measure of workload is **prompts.**

That is an **intermediary** – **not a valuable outcome.**

Prices are **very low** relative to the value it is possible to create.

This does not sound like the value-based pricing guidance… and yet they are highly successful.

It would be understandable to revere Lovable. Why not copy their pricing?

There are specific strategic reasons why a competitively priced workload-based model works for Lovable

1.

Workload, while cost-based, is value-aligned externally

✓ Alternative to Loveable? Hiring a developer

✓ Developers bill hourly, which is a function of tasks

✓ Loveable is *significantly* cheaper per task than a developer

✓ Charging per task serves to reinforce the savings you realize vs a developer

2.

As a developer platform, Lovable *wants* usage to be inexpensive…

✓ Customer does not realize value until the product is built

✓ Lovable wants you to be able to use it freely and inexpensively until you create something of value

3.

… and *cannot* charge for outcomes (at least not up front)

✓ Outcome- or value-based pricing will always be more lucrative than workload-based pricing (if you can do it)…

✓ … but Lovable doesn't know what you are building, how it will generate value for you, or how much value it will generate

✓ Outcome-based pricing is **structurally infeasible** for Lovable

4.

Lovable

They have an *enormous* market opportunity, and they are aiming for adoption

✓ Developers

✓ Buyers of developer services

✓ Companies/professionals that never would have thought about building software, but now can

They may decide to monetize deployed products at a later date…

It would not make sense for most AI products to adopt Loveable's model

2 AI monetization scenarios – Workload-based or Outcome-based?

	Lovable	BD Rep Agent
Value created by	Building a software product	Generating a lead
Value of outcome	Large	Small (but meaningful)
	Variable	Consistent
	Intangible (up front)	Measurable
	Delayed	Timely
Viability of Outcome-based pricing	**LOW**	**HIGH**
Role of workload	Make progress towards the outcome	Generate the outcome
Value of workload without outcome	Meaningful	Zero
Viability of workload as a value-proxy	**HIGH**	**LOW**
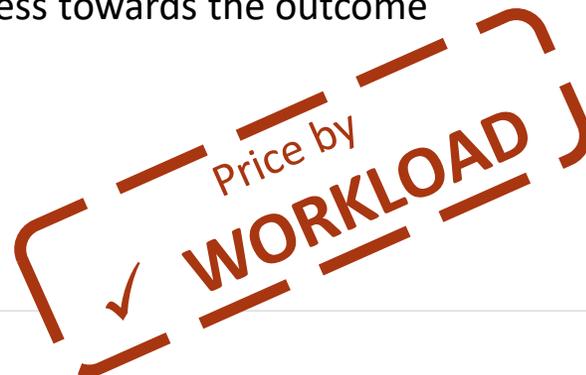
✓ Price by **WORKLOAD**

✓ Price by **OUTCOME**

There could be negative consequences for the AI industry if similar pricing models were used at scale

Lack of Value-based pricing

→ **Short term**
Under monetized products

→ **Long term**
Systemic reduction in willingness-to-pay for AI

Wrapping Up

Final Takeaways

The Future of AI Monetization Is Not About Tokens.

It's about:
- ✓ Understanding structural context
- ✓ Choosing the right value metric
- ✓ Designing for strategy, not just cost recovery
- ✓ Avoiding copying pricing fads

Tokens can be powerful — when used deliberately.
Use them to unlock strategic advantage, not to compensate for weak value alignment.

When tokens are the right approach, follow the 4 step framework to build out your model

Questions?

James D. Wilton

About Monevate

monevate

A monetization-centered consulting firm serving XaaS, tech, AI and other visionary companies

Who We Are

- **A world-class boutique consulting firm** – we provide *"McKinsey-level consulting for boutique prices"*

- **Specialists in pricing and monetization,** with unparalleled expertise in driving step-change growth through pricing transformation

- **Disruptors to traditional management consulting** – founded in 2021, we bring a fresh perspective on consulting:
  - ✓ **Flexibility**: We provide strong recommendations, but adapt to client preferences and capabilities to ensure we always **"land the plane,"** and outputs don't become shelfware
  - ✓ **Creative Pragmatism:** We balance creativity and operational constraints to find the "Best Pragmatic Answer (BPA)" – the optimum solution that you can actually implement on your timeline

What We Do

- **We deliver value through Pricing-Fueled Growth** – go-to-market transformation with monetization at the core

  - ✓ **Pricing Strategy Development, Optimization, and Transformation**

  - ✓ **Product & Offer Strategy**

  - ✓ **Go-To-Market Strategy**

  - ✓ **Sales Effectiveness and Commercial Excellence**

  - ✓ **Commercial Due Diligence**

Who we Serve

- **B2B XaaS** (incl. SaaS, DaaS, HaaS etc.) **and AI** – including both:
  - **Product-Led Growth (PLG)**
  - **Sales-Led models**

- **B2C SaaS and Subscription**

- **Consumer Retail and eCommerce**

- **Other** – including Professional Services, Industrials etc.

Pricing-Fueled Growth aligns pricing with GTM, product, sales effectiveness and background ops to maximize commercial impact

GTM Strategy

Defining who to sell to, how to reach them, and **how to position**
- TAM Analysis
- Market segmentation & ICP definition
- Value proposition definition
- Buyer persona creation
- Expansion Strategy

Product & Offer Strategy

Organizing, **positioning,** and **defining the product** prior to monetization:
- Product vision definition
- Product taxonomy creation
- Feature testing & development road mapping

Commercial Due Diligence

Supporting PE & VC firms by assessing pricing power, value creation potential, and risks of acquisition targets

Commercial Excellence

Ensuring sales teams **get** the price you deserve through value selling and better discounting discipline
- Value messaging & value-based selling design
- Sales compensation and incentive design
- Discounting rules and governance
- Sales enablement and negotiation training
- Renewal pricing

Pricing and Revenue Ops

Aligning RevOps, pricing, and finance to ensure pricing is deployed and supported
- KPI definition and dashboard creation
- CPQ implementation
- Pricing Org. Design

Pricing Strategy

Determining the optimal packaging, price architecture, and price levels
- Pricing Strategy Transformation
- New Product Pricing
- Price Structure/Level Validation and Optimization

Our core focus is on B2B and B2C SaaS and subscription businesses

B2B XaaS & Subscription

XaaS Variants	Sales-Led Growth (SLG) (Enterprise)	Product-Led Growth (PLG) (SMB & MM)
AI (AIaaS)	✓	✓
Software (SaaS)	✓	✓
Hardware (HaaS)	✓	✓
Data (DaaS)	✓	✓
Platform (PaaS)	✓	✓
Sectors		
Cybersecurity	✓	✓
Fintech	✓	✓
Healthtech	✓	✓
DevOps	✓	✓
Martech	✓	✓

SWIMLANE · Alkami · Energy Exemplar · G2 · conga · Clarivate™ · hyperexponential · AUDITBOARD · HelpScout · R365 · duda · holistiplan · Baymard Institute

Consumer XaaS & Subscription
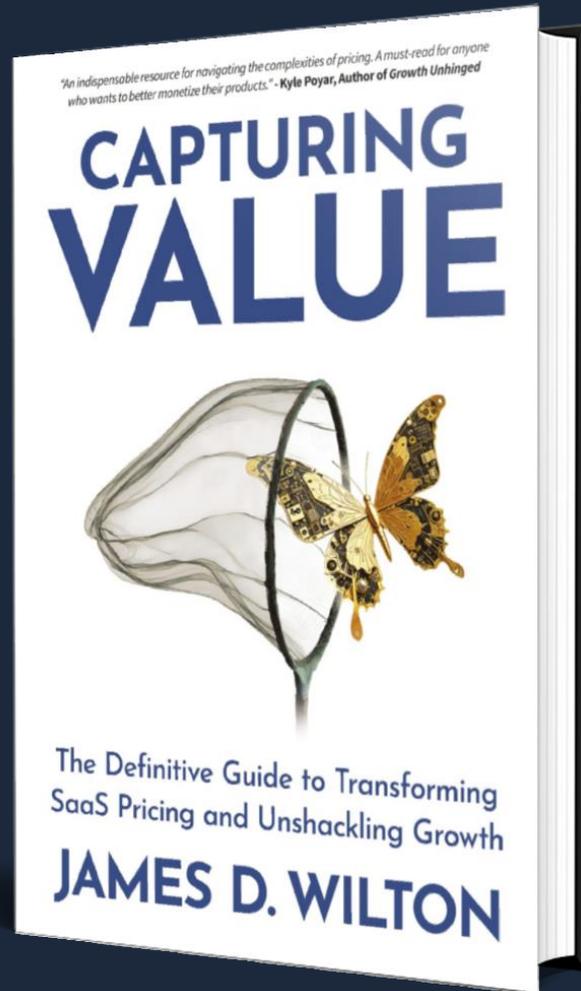
AllTrails · Google · Calm · CrossFit

Retail & eCommerce

minted.™ · HT

50+ Pricing-fueled growth transformations since 2021

We have written the definitive guide to pricing for subscription businesses

"Capturing Value provides an invaluable framework for building a pricing strategy, James D. Wilton's approach works."
Nick Francis, CEO & co-Founder, Help Scout

"An indispensable resource for navigating the complexities of pricing. A must-read for anyone who wants to better monetize their products."
Kyle Poyar, Operating Partner, OpenView

"Chock full of insights and case studies, Capturing Value should help executives optimize their pricing and grow their businesses."
Manish Goyal, Operating Partner, Berkshire Partners

"A goldmine of pricing wisdom for anyone running a subscription-based business. This should be the "go to" pricing manual for any SaaS founder or seasoned exec looking to unlock growth."
Brian Feinstein, Partner, Bessemer Venture Partners

"James D. Wilton is the SaaS pricing expert's expert. Essential reading – an instant classic!"
Godard Abel, CEO & co-Founder, G2

Why work with us?

We are specialists

We are solely focused on monetization and pricing-fueled growth, and no other firm has the depth of expertise we have in this niche. We've chosen this area because we think it's fascinating, and we seek to push the thinking of the industry.

This is all we do. We like it. We are very good at it.

We are creative

While analytics and science are essential for a strong monetization strategy, they are also insufficient. What makes the difference between a "check the box" pricing strategy and a great one, is creativity and innovation – the "art" side of pricing.

We bring design-thinking to every engagement, and we constantly challenge ourselves to design better, more original solutions.

We are bespoke

The right pricing strategy for your business is based on the realities of your business and so any approach needs to reflect your uniqueness. We have found efficient ways learn the nuances of your business quickly and customize our solutions to every client.

We ramp up on your business quickly to get to the right strategy for your objectives. No "cookie cutter" solutions.

We are honest

Client service is important for all small firms, but there's a difference between a servant and a sycophant. It's our job to deliver the best answer for you, and sometimes that means we need to tell you things you don't want to hear.

We can't promise that you will always like it (at least in the short term), but we promise to do it all the same.

#1

You are our top priority

We have consciously chosen to serve smaller companies like you. You are not a "hobby" for us. Our leadership will not skip meetings because something "came up" with our "core" clients.

You are our core. You are our focus. You will always have our full attention, and our best thinking.

Thank you!