



## 2 Days - Business Strategy & Pricing Hands-on Seminar *Virtually*

### Background

- The client company had a technical SaaS and AI solution ready for use by early adopter customers.
- It had been QA tested and posed a low risk of adoption in terms of user experience for B2B market.

### Objective

- To determine the critical business and sales objectives and ensure the CEO, Sales Team, Tech Team, and Marketing are all aligned

### Output

- **Defined business strategy and execution plan** to acquire new customers
- **Established pricing model** (with flexibility to adjust in the future)
- **Path Forward:**
  - What are the next steps?
  - How will you maintain alignment across teams moving forward?

The following page outlines a sample agenda for the 2-day hands-on seminar.



### DAY 1: Monday, Jan 9th 9AM-3PM

Agenda			Time
	Coffee & Get settled	0.5 hr	9-9:30am
<b>Business</b>	Client presents the current use cases and customers.	1 hr	9:30-10:30am
<b>Technology</b>	Client walk through the product demo	1 hr	10:30am-11:30pm
	Lunch Break		11:30am-1pm
<b>Business</b>	Business Objective & Strategy Definition <ul style="list-style-type: none"> <li>- What is critical for the business</li> <li>- What is the strategy to achieve that?</li> <li>- What is the next step to achieve that?</li> </ul>	1-1.5 hrs	1pm-3pm

### Day 2: Tues, Jan 10<sup>th</sup> (Half-Day: 9am-2pm)

Agenda			Time (EST)
<b>Business</b>	Pricing Subscription or Fee Model Discussion	1-1.5 hrs	9-10:30am
<b>Business</b>	Business Strategy Execution <ul style="list-style-type: none"> <li>- What is the Strategy?</li> <li>- What are the next steps to achieve that?</li> <li>- How are we following up?</li> </ul>	1 hr	10:30-11:30am
	Next Steps & Assign Follow-ups	1 hr	12-1pm

## Business Strategy & Pricing Model Brainstorming Notes

### Notes

1. What are the business objective? (Example: Acquire X customers or partners by X date)
  - a. How? (Example)
    - Gaining tractions by going to professional events.
    - Increasing leads through conference, networking, contacts
    - Convert leads to potential customers
2. What is the strategy to convert leads to potential partners/customers?  
(Example: Give first customers X discount or partner with X)
3. Pricing Model Structure
  - a. Subscription based (monthly or yearly) or 1 fix fee
  - b. Pro & cons of both
  - c. Select the Pricing Model to move forward with
4. Pricing Model Validation
  - a. Understand the # of users
  - b. Competitor's pricing
  - c. Is high price acceptable?