SmartPath

The Perfect Pricing Template

How to nail the perfect price for any tax client in 3 Simple Steps.

- Increase your margins with every tax client
- Get paid what you’re truly worth
- Easily give clients a simple price they’ll want to pay

Perfectly Price ANY Tax Client in 3 Simple Steps

Hi, I'm Will Hamilton, Founder of SmartPath.co

We help small **tax & accounting firms** improve their pricing so they can increase their margins and focus on work they enjoy.

This Perfect Pricing Template© will show you exactly how to find the perfect price for any tax client in 3-simple steps.

1,000's Tax firms across the US are already using this process to stop feeling anxious whenever it's time to talk to clients about fees.

The great thing is, you can use this template with new and existing clients. As soon as you start following these three steps:

- *You'll increase your profit margins for every engagement.*
- *You'll increase your revenue so you can pay yourself what you deserve.*
- *You'll give clients a price that makes sense and they'll be happy to pay.*

Let's dive in!

William Hamilton

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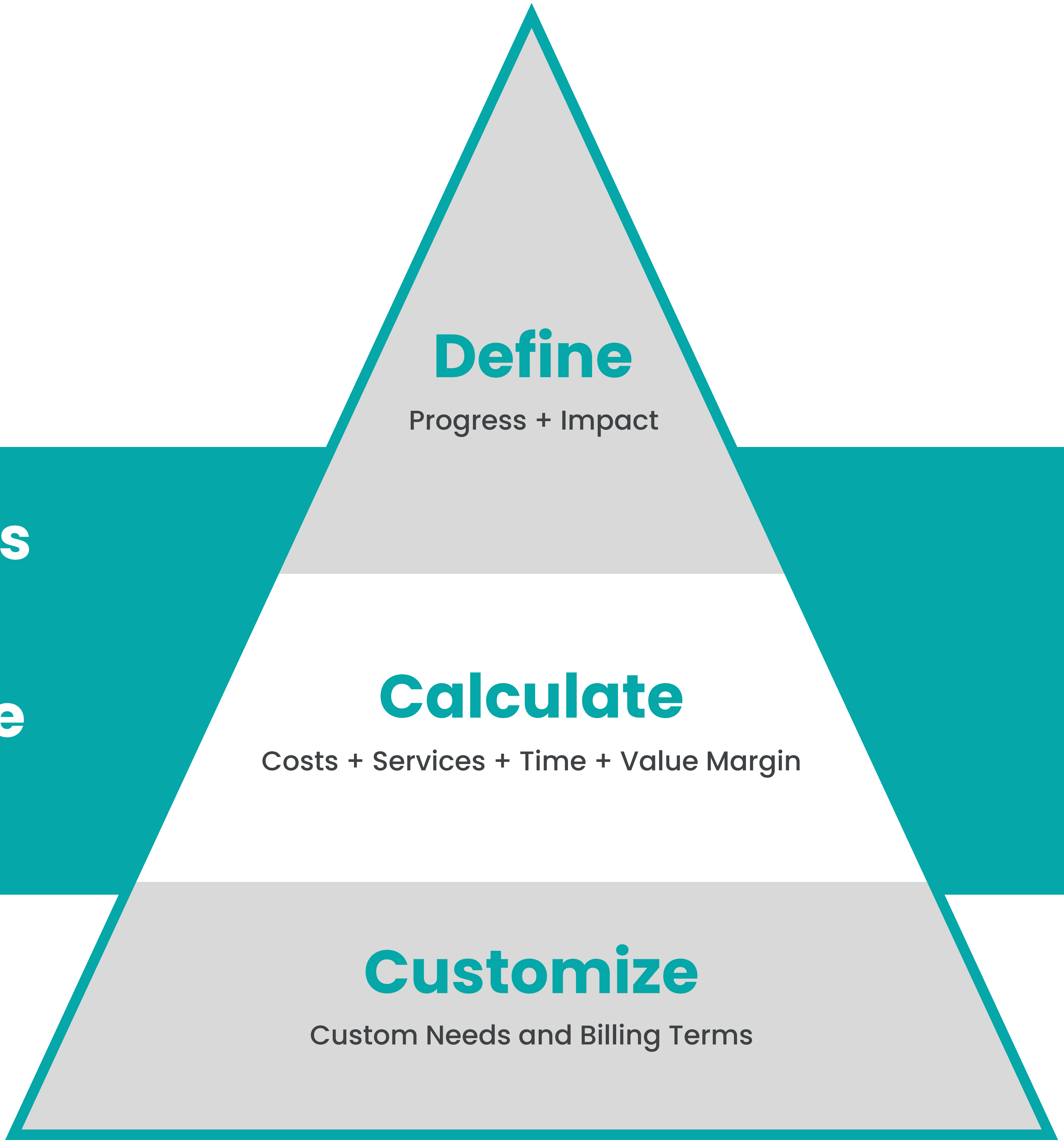
How to Find the Perfect Price

The Perfect Pricing Template© has three specific steps you'll need to execute to reveal the perfect price for any client:



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Define Results

Progress + Impact = High Value Engagement

What if you knew before giving a client their proposal, exactly how much they were willing to pay?

Would that eliminate anxiety around giving them a proposal?

Would you feel more confident having the pricing discussion with them?

Of course, it would! It would be an absolute game-changer.

Many firms are already getting this information from clients and it gives them a significant competitive advantage.

They never give clients a proposal **without knowing** how much they're willing to spend first.

The amazing thing is, **clients** will tell you if you ask in the right way.

There are **two specific questions** you need to ask the client:

What tangible progress does this client want to make in the next 12 months?

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B. What will the tangible impact be on their life/business?

Notes: see the ***Premium Discovery Quadrant*** training

There are 5 major categories of value clients are willing to pay for in today's environment:

Category 1

Setup Help (Helping someone set up their Quickbooks or S-Corp)

Category 2

Expert Historic Work (Tax Prep or Accounting Reconciliation)

Category 3

Done-For-You Management (Accounting, Payroll, or helping with IRS Issues)

Category 4

Tax Reduction Planning (Strategic Tax Planning, Reasonable Comp Analysis, etc.)

Category 5

Better Results Planning (Cash flow analysis, budgeting, business advisory, etc.)

Ask the two simple questions above to start to build a list of services the client would be willing to pay for.

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Calculate

Costs + Services + Time + Profit (Expertise)

Once you know what categories of services the client wants to pay for, you need to estimate the actual numbers around those services so you can identify a price range that will lead to a fair profit margin for you.

Costs	Services	Time	Value Margin

Estimated Total Contract Value $ ____________________

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Customize

Custom Needs + Billing Terms

The last step is to customize the terms of the Engagement to match the client's needs.

Does this client have any custom needs we need to account for?

Does this client have any custom needs that would increase their overall fee?

# 1	
# 2	
# 3	
# 4	
# 5	

Billing Terms ***(How do you want to get paid?)***

- ○ All Upfront
- ○ Half & Half
- ○ Quarterly
- ○ Monthly
- ○ Monthly + Custom Upfront Amount

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"The Perfect Price"

$ Upfront

$ Month / Quarter / Year

Pricing Options

Once you have the estimated total contract value, you can break that value into three options or terms the client can choose from:

Option 1	Option 2	Option 3

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Next Steps

Congratulations on taking the first step in getting paid what you deserve!

When you use this template to price and package your services you will immediately see:

Clients are happier to pay your fees.

Your margins are higher for every client you work with.

If you want to automate your pricing and Fee Schedule, we can help.

Schedule a demo of the SmartPath Engage Software.

- ***Our pricing engine recommends the perfect price for any tax client in seconds.***
- ***Send clients a Magic Link to see and select the services they want.***
- ***Gather all the info you need to onboard clients 3x faster.***
- ***Automatically manage scope and change requests.***

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