

Chapter 4: Solution Design & Pricing That Scales

From Chaos to Calm

Let's talk about the client. When they first come to you, they aren't just confused; they are, as the source material notes, "overwhelmed and lost (deservedly so)".¹ The AI landscape is pure, deafening chaos. Their inbox is full of hype, their leadership is asking questions they can't answer, and their instinct is to look for a hero—or at least a guide.

Your job, first and foremost, is not to add to the noise. It is not to show them 15 more flashy tools. Your job is to be the one person they "come to for calmness, not agitation or friction".¹ This sets the entire foundation for our work. You are not a vendor selling a product; you are positioning yourself as a "PARTNER, not a dollar sign relationship".¹

This calm doesn't come from just being a soothing person. It comes from having a rock-solid, undeniable *system*. This brings us to the single most important idea in this chapter.

The Confidence Principle:

"The more systematic you are, the more they derive confidence from YOUR confidence about the process."¹

This is everything. Read it again. The client isn't just buying your AI knowledge; they are buying your *process*. They are buying your map. The source material states it perfectly: "Even if they're not 100% sure how well you'll do, a solid systematized plan gives them confidence to move forward".¹

Your primary product, in this initial stage, is *anxiety reduction*. They are lost in the woods, and you are selling them a clear, well-lit path. The rest of this chapter *is* that path. This framework is your most valuable asset.

And that path begins by playing detective.

Part 1: The Murder Mystery Framework: Diagnosing the Current State

I call this "The Murder Mystery Framework".¹ Forget "auditing"—that's boring and sterile. We are *investigating*.

Think of it this way: "Someone murdered time. Someone murdered efficiency. Your job: Find out who, what, when, and why".¹ To do that, you need a forensic kit. That kit consists of four worksheets.

Worksheet 1: Map All Current Tools

This is the first part of your kit. You need to map *all* their tools, not just the AI ones.¹ Create a simple worksheet with these columns:

- **Tool/Platform Name**
- **Type of Tool** (AI or non-AI)
- **Use Case** (why they're using it)
- **Department**
- **Number of Users**¹

That last column, "Number of Users," is your secret weapon. This isn't just a number; it's your "ammo for prioritization".¹ When it's time to choose a project, you can confidently say, "If we fix this process first, it will affect 500 users. That's a third of your company".¹ That's how you get a "yes."

Worksheet 2: Find Knowledge Sources

Now the detective work gets granular. Where are the bodies buried? Where does the knowledge live? You must map "every single knowledge source possible".¹

Your list should include:

- The sources (Notion, Slack docs, Confluence, Jira, internal wikis)
- Type of document
- Connected AI tools (even their "quick and dirty RAG setups")
- Where it's stored
- **How often it's updated** (this is "critical for RAG viability" ¹)
- Size and volume ¹

This worksheet is not just a list; it's your project's technical go/no-go. The "size and volume" and "data types" will be the first technical decision you make.

The Detective's RAG-Decision Questions

When you're looking at their knowledge sources, you *must* ask these two questions:

1. "What data types? PDF, doc, image, video?"
2. "How big? How many?" ¹

The answers tell you everything. They tell you: "Can we dump this in a large context window, or do you need proper RAG?".¹ If it's the latter, the answers *then* determine the *level* of RAG required: "Quick and dirty? Hybrid RAG? Agentic RAG (10,000 pages \rightarrow 100 page cheat sheet)?"¹ A consultant who skips this will promise a simple solution for a problem that demands an agentic one, and the project will fail.

Worksheet 3: Document Processes

This is where you spend "1-2 hours" mapping the human element.¹ What are the "decision points"? What are the "operational procedures"?

Most importantly, what is the "tacit knowledge they forget to mention"?¹ Be warned: "Even if they think they understand their own process, once you get into solutioning, tacit knowledge gaps will appear".¹ This worksheet is your first attempt to find them.

Worksheet 4: Identify the Owners (The Suspects)

Finally, you map the *people*. Who are the "suspects" in this mystery?

- Business owners of each tool/process
- Technical owners (as the source notes, "many companies have zero"—a critical finding)
- Who holds the money (CFO? Controller? C-suite?)¹

This is not a contact list; it's a political map. The source material is clear on "why this matters": it's for "understanding political allegiances".¹ It's to find out, "Do you like Gamma because you've used it for 2 years, even though Claude 4.5 Sonnet now does the same thing?".¹

This map tells you who to persuade, who controls the budget, and who might secretly want the project to fail. The lack of a "technical owner" is a giant red flag that tells you *you* will be responsible for 100% of the technical lift.

Part 2: Making It Tangible: The Baseline Assessment That Proves Your Value

Once you have the lay of the land, you *must* get a baseline. This is non-negotiable. Why?

"Otherwise people will say we spoke to an AI consultant and accomplished nothing because you couldn't make it tangible."¹

You have to prove your value before you even start. You do this by creating a "Before" snapshot and an "After" vision.

The "Before" Snapshot: Metrics That Matter

Capture these "Before/After measurements" 1:

- Time spent on manual tasks
- Error rates on processes (e.g., "50 out of 100 applications are edge cases")
- Cost per transaction/output
- Employee satisfaction score
- Customer satisfaction metrics (if client-facing)

The "After" Vision: Defining Target Outcomes

This is your promise. What are we aiming for?

- % reduction in manual processing time
- Accuracy improvement targets
- ROI and cost saving goals
- User adoption rate targets
- Output quality improvements¹

You then plug all of this into a simple, professional framework. This framework is your shield.

The KPI Framework Structure	
KPI Name	**
Baseline Value	<i>[e.g., 12 minutes per ticket]</i>
Target Value	<i>[e.g., 3 minutes per ticket]</i>
Measurement Method	**
Review Frequency	<i>[e.g., Monthly]</i>

This framework isn't just for the client. It's for you. As the source material says, "The numbers are here as anchors for you. When you're grilled by C-suite, this is what you hold onto".¹ It objectifies success and protects you from subjective, "I-don't-feel-like-it's-working" feedback.

And remember to add the human nuance: "Don't measure day-by-day... Fridays = less productive. Mondays = less productive. Humans are humans. Weekly or monthly is better".¹ This shows you're an experienced partner, not just a vendor with a stopwatch.

Part 3: The 3-Act Rollout: From Pilot to Optimization

Now you have your map and your destination. It's time to roll out the solution. This is a 3-act play.¹

Phase 1: PILOT (30-60 days)

This is the controlled test. You must be rigorous.

1. **Select pilot group** (and the advice is perfect: "count on one hand how many people")
2. **Train core users**

3. **Run for 30-60 days**
4. **Collect feedback**
5. **Analyze results**
6. **Document wins in metric format** ("tangible reporting")
7. **Document issues**
8. **Refine processes** (You'll always find surprises, e.g., "assumed people always do X, Y, Z
\$\\rightarrow\$ turns out only 60% of the time") ¹

Phase 2: SCALE

Once the pilot is a documented success, you're clear for takeoff.

1. **Train next cohort** (a "much bigger group")
2. **Deploy to entire department**
3. **Monitor adoption and adherence**
4. **Track metrics from pilot issues** ¹

Phase 3: OPTIMIZE (3-6-12 months)

This is the long-term game, and it's where you secure your long-term value. This is not just about maintenance; it's about evolution.

Goals for this phase:

- Track KPIs
- Identify bottlenecks (they "keep popping up")
- **Stay on top of model changes** (e.g., "3.5 Turbo deprecated mid-2026")
- Identify critical gaps
- Recommend next steps ¹

Pay attention to that "model changes" bullet. This is your built-in retention strategy. The source material is explicit: "As models change and deprecate, bottlenecks will continue. Your responsibility: Either YOU monitor this, or give the organization what they need to do it themselves".¹

This phase is how you create the business case for your next contract. You're not just finishing a project; you're proving that AI is not a "one-and-done" solution. It's an ongoing partnership.

This is how you transition a \$15K project client into a \$10K/month retainer client.

Part 4: The Centralized Strategy: Finding the First Domino

Now that we have the "what" (the framework) and the "how" (the rollout), we need the "where." Where do we point this powerful weapon first?

Before you pick a pilot, you need a pre-flight checklist. You must know:

- Where SOPs, customer data, and company knowledge live.
- Their tool structure (e.g., "using MCP servers? Which ones and why?").
- Their connectors, custom APIs, etc.¹

And you must follow the Golden Rule of Integration: *be a partner, not a purist*. The source material gives the perfect example: "If they use Zapier for 90% of things, does it make sense to say 'switch to N8N' just because you prefer it?"¹ The answer is no. You meet them where they are.

Finding the "Wind Under Your Sails": Prioritize Revenue

Here is the single most important filter for choosing your first project:

"Revenue-adjacent = highest value. Even 1% incremental positive change = tangible benefit = wind under your sails."¹

You want the fastest path to a provable, tangible win. That win gives you the political capital and momentum to tackle bigger, messier problems.

Focus your search on these four revenue-adjacent areas¹:

1. Sales Use Cases

- Lead research

- Email drafting
- CRM updates
- Qualification
- Follow-up sequences
- Meeting prep

2. Support Use Cases

- Ticket summarization
- Response templates
- Knowledge search
- Escalation routing
- Customer history
- Auto-drafting replies (with human-in-the-loop approval)

A real example given is for an e-commerce client: "Low-level informational tickets = autonomous response. Edge cases ('I ordered in Slovenia, now in Australia') = human intervention".¹

3. Marketing Use Cases

- Content creation
- SEO research
- Social posting
- Ad copy
- Campaign analysis

4. Operations Use Cases

- Process documentation
- Data cleanup
- Report automation
- Workflow optimization

Part 5: The Ecosystem: A Pricing Strategy That Scales

This is the commercial engine that powers the entire partnership model. It's designed to have an answer for *everyone*, ensuring no lead is ever truly "lost." It all starts with a brilliant "downsell" strategy.

The "Community Downsell" Hack: Keeping Your Foot in the Door
Instead of losing a client after one or two paid calls, you offer them a "mini-community" (5-10 people) for \$10-20/month. This gives them "fractionalized access" to you (e.g., you answer all questions once a week).¹
Why do this? "Your foot stays in the door with people who otherwise wouldn't book another call".¹ It's the ultimate low-friction, long-term relationship builder.

From there, you build a ladder of engagement.¹

Engagement Options & Pricing Tiers		
Tier	Price	Key Services & Value
Tight Budget / Community	\$10-20/month	"Community / Fractionalized access." Foot in the door.
Medium Budget	\$250-500 per call	"Bundled sessions + emails." 15-min calls are popular.
Real Budget (Retainer)	\$2K-10K/month	"Weekly check-ins, Ongoing email support, Small builds (GPTs, automations), Team training."
Enterprise Tier	\$15K+ (Project-based)	"Full implementation, Multi-department, Subcontract developers, Change management."

This structure is your entire business model. You'll want to add the specific "color" that makes it work:

- **For Retainers:** Give clients a template for email support to avoid "Hobbit essays." The template is simple: "Problem, What You've Tried, Question".¹
- **For Enterprise:** Note that the "Public sector = way more expensive" but comes with "red tape/bureaucracy/audits".¹ This is your chance to displace the giants: "Instead of the Big Four getting it, why don't you get it?".¹

How to Frame Options When the Budget is Unknown:

The source material provides a perfect, no-pressure script. You simply let them choose:

"I have three ways we can work together:

1. **Most affordable:** \$20/month community
2. **Middle ground:** 30-minute or 15-minute call
3. **Premium:** Package of 4 one-hour calls for \$1200"¹

Part 6: The 60-Minute Close: A Structure for Success

This 60-minute call structure is the entire playbook, executed in miniature. It's how you *run* the diagnosis and close the deal, all in one systematic, confidence-building session.¹

- **0-5 min: Pain and goal** (This is Part 2: Baseline Assessment)
- **5-15 min: Real discovery** (This is Part 1: The Murder Mystery)
- **15-25 min: Diagnosing** (Also Part 1: The Murder Mystery)
- **25-35 min: Recommendation** (This is Part 3 & 4: Rollout & Strategy. Note the vital addition: "walk through why it might not be realistic for their business.")
- **35-40 min: Next steps** (This is Part 5: Pricing Tiers & Close)

This 60-minute call is a compressed, fractal version of your entire multi-month engagement. You prove your systematic approach by *executing* it in real-time.

Your 60-Minute Call Checklist ¹:

- Start with pain/goal
- Ask scale questions
- Map their stack (mentally if you think in workflows)
- Find knowledge gaps
- Give HONEST advice
- Warn of pitfalls
- Show alternatives (which are "quicker/cheaper")

- Offer pricing tiers

It's a lot, but "The more reps you get in, the more readily available this information will be for you".¹

Chapter Conclusion: The Brutal Truth About What Really Matters

This chapter has been about systems, frameworks, and pricing. But I want to end with the "why." It's not about the tools. It's not even about the knowledge.

"In the next 12-18 months, all knowledge for knowledge's sake will be worthless. Relationships will be paramount."¹

This is the brutal truth. Your system gets you in the door. Your relationship keeps you there. What does this mean in practice? It means you are "Pro relationship over nickel and diming".¹ The source material gives a real example: "Got email from former client about decision point. Two-sentence answer, one minute of thinking \rightarrow Didn't charge".¹

This is the final philosophy: **Be The Calm In The Chaos.**¹

When your client is spinning, use these phrases:

- "Ignore the noise"
- "Start simple"
- "You're not behind"
- "We'll build this correctly together"¹

The ultimate goal, the one that builds a practice that lasts, is to "Position yourself as a PARTNER, not a dollar sign relationship".¹

Works cited

1. Consulting Playbook Day 4_Solution Design & Pricing That Scales.txt