

Value-based pricing for accounting professionals

Initiate pricing conversations, present your services and build profitable proposals for you and your clients.

Visit: Sage.com/CA/SageValue

Getting started

1

Sign in process

Access Sage Value with your Sage Impact ID. This access is complimentary to accountants and bookkeepers.

2

Profile set up

Add in basic profile information for your firm and each of your clients to begin using the tool. This step also lets you rate each client.

3

Client interview

Start a conversation with each client to understand their needs and wants, then document this information using the Sage Value tool.

Building proposals

4

Service plans

Based on client discussions, create service plan options for the client to choose from. You can select up to five service plan options per proposal to send clients. For example, Silver, Gold, Platinum.

5

Value analysis

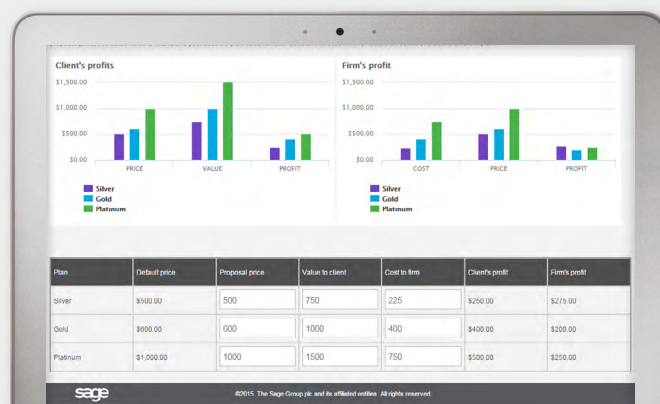
Quantify the value your client will receive from each service plan which is used to set prices. Then do a value analysis to ensure you can deliver the work and make an acceptable profit.

6

Proposal generation

A clear, concise side-by-side view of the service plans and pricing offered, along with projected revenue and profitability. Proposals can be saved and archived.

Firm view



Client view

