

COMMERCIAL PROPOSAL

A proposition built around what your customers value.

Understand what makes customers choose you.
Build the offer and the commercial model around it.

PREPARED FOR

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The
Impossible
» Club.

Help customers see why HearthPlan matters.

Avery, HearthPlan helps home-energy installers bring surveys, quotes and installation plans together. We need to understand which customer problems matter most, what buyers value and what would make them choose HearthPlan over the way they work today.

THREE THINGS YOU RAISED

Customer value.

Understand what installers need to do better: quote accurately, coordinate jobs or keep homeowners informed. Establish which problems they would pay to solve.

Reasons to choose.

Help buyers see what changes for their business and customers, and why HearthPlan is worth changing how they work.

Growing well.

Choose the customers and opportunities that make commercial sense. Shape the offer, price and support around what they need.

Let's establish what customers value before asking more people to buy. That understanding should shape the proposition, the offer and the price, then the way we take HearthPlan to market.

Customer Value & Pricing

Fee omitted from this
public example

A clear view of what customers value, why they would choose HearthPlan and what they would pay for. Turn that thinking into a proposition, packages and prices you can stand behind.

01 What do customers actually value?

Use existing customer evidence to identify the problems worth solving and what a better outcome looks like.

03 Why would they choose HearthPlan?

Work through the alternatives, including current tools, and the proof buyers need before changing.

05 What should HearthPlan charge?

Price points or ranges informed by customer value, alternatives and the cost of delivering the service.

07 How should onboarding and trials work?

What customers need to get started, what support is included and when payment or commitment begins.

02 Who needs it, and who makes the buying decision?

Distinguish the installer, office team and business owner. Understand what each needs from the product.

04 How should the offer be packaged?

Up to three routes: who each is for, what is included and when a customer needs more.

06 How should the price change as customers grow?

Clear rules for additional teams, job volumes and support needs, with practical limits on discounting.

08 What customer mix supports sustainable growth?

Illustrative revenue scenarios using customer numbers, packages and delivery costs. Not a sales forecast.

YOU'LL LEAVE WITH

A customer-value recommendation, clear proposition, packages and prices, a usable price card and an editable revenue scenario model. One working session to work through the decisions together.

Focused scope: existing information and light desk research; one 60-minute working session and one consolidated revision. New customer research, bespoke prospect pricing and substantial further modelling are separate.

We'll work through what you already have at the start and agree any assumptions needed for the recommendations.

90-Day Commercial Partnership

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Monthly fee · 3 months · Separate engagement

I'll work alongside you as your commercial partner, helping you understand what makes customers choose HearthPlan, strengthen the offer and progress the right opportunities. Five connected areas, prioritised together across the 90 days:

- | | | |
|----|--|--|
| 01 | Customer strategy & go-to-market | Define the priority installer businesses, their needs and who makes the buying decision. Build a ranked account shortlist and a 90-day plan around credible opportunities, direct and partner routes, and proof we can use with permission. |
| 02 | Market narrative & positioning | A clear value proposition: why buyers should change, choose HearthPlan and pay. Bring it to life in one editable sales deck, messages for two buyer groups and a case-study template that shows customer value. |
| 03 | Pitch coaching & commercial refinement | Rehearse buyer conversations, defend value and price, and handle objections with a practical guide. Refine pricing, packaging and positioning within the agreed framework as we learn who will pay, for what and on which terms. |
| 04 | Active support for important deals | Deal briefs, offer preparation and next-step plans for at least one priority opportunity each month where a suitable live deal exists. I'll join selected high-value buyer meetings as your external commercial partner. |
| 05 | Foundations for a dependable service | Build on your existing onboarding and email support arrangements. A practical operating plan covering account ownership, support and escalation, service availability and key dependencies, with clear responsibilities and prioritised actions. |

How we work: regular working sessions and practical delivery throughout the month, focused initially on two priority customer groups. We agree priorities and buyer meetings together. Substantial pricing-model rebuilds, technical assurance, implementation and ongoing service operations are scoped separately.

What we'll build over 90 days.

A practical sequence for the partnership, using the separate Customer Value & Pricing as our starting foundation. We'll agree priorities at the outset and adapt them as buyer evidence and live opportunities develop.

BY DAY 30

Choose where to win.

An agreed priority customer, the problems that matter to them and a ranked account shortlist. An initial value proposition and buyer story, with the evidence gaps clear. A first review of onboarding and support needs.

Decision: which buyers and opportunities deserve our focus?

BY DAY 60

Equip the sales effort.

A usable core sales deck, messages for two buyer groups, a case-study template and objection-handling guide. Pitch rehearsals and refinements to offers based on live buyer feedback and evidence of willingness to pay.

Decision: what should we retain, change or test next?

BY DAY 90

Make the approach repeatable.

Refined positioning, packages and sales materials; a practical service operating plan with responsibilities and prioritised actions. A review of opportunity progress, commercial learning and the next 90-day priorities.

Decision: where should we invest effort next, and what support is needed?

Throughout: regular working sessions, pitch preparation and active support for at least one suitable live opportunity each month, including selected joint buyer meetings. Milestones describe our work and outputs; customer decisions and sales timing remain outside our control.

Understand the value. Build from there.

Two complementary engagements. We begin with customer value, the proposition and pricing, then use that work in the buyer conversations and opportunities we pursue together. You can agree both now; the fees remain separate.

CUSTOMER VALUE & PRICING

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Customer value, a clear proposition, packages, prices and an editable revenue scenario model. A focused, standalone piece of work with a fixed fee.

90-DAY COMMERCIAL PARTNERSHIP

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Three months of commercial strategy, sales materials, coaching, selected deal support and service planning, with a monthly fee.

AS WE LEARN FROM CUSTOMERS

We'll use buyer conversations and live opportunities to test the thinking: what customers value, what they question and what they will pay for. If the evidence points us towards a different offer or customer group, we'll work through the implications together. Any additional research, delivery or commercial commitments will be agreed separately.

Let's talk through the proposal before you make any decisions, so we can agree what would be most useful, clarify the scope and discuss how the work would fit around your priorities.

Thank you.

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Illustrative adaptation of a proposal developed with Cleo. The company, person and industry context are fictional. Fees are omitted from this public example. No original client information is reproduced.