

— FOR AGENCY OWNERS AND FREELANCERS BUILDING A TEAM

The package and **pricing worksheet.**

A workbook to turn the services you sell into a few clear packages, each with a scope, phases, revision rounds and a payment schedule. The prices are yours to write.

TIME

Two working sessions

FOR

Agency owners, sales leads

EDITION

October 2026

HOW TO USE IT

Sell packages, not hours.

When every proposal starts from a blank page, every price becomes a negotiation, every scope is a little different and nobody on the team can sell without the owner. Packages fix that: the client chooses between a few clear options, and your team delivers the same steps every time.

This worksheet does not tell you what to charge. It walks you through the decisions behind a price: what is included, what is not, how the work is split, how many revision rounds, and when the money arrives. Write your own figures in the blank fields once the rest is clear.

Session 1	Sections 1 to 3: list what you sell, group it into packages and write the scope of each one.
Session 2	Sections 4 to 6: phases, revisions, payment schedules, your prices and your minimum engagement.
Before you use it	Section 7 and the table at the end. Read the packages to one salesperson and one client you trust, then adjust.

01

Everything you sell today

Start from the work you actually did, not from your services page. The list is usually longer and messier than you expect.

List every kind of project you delivered in the last twelve months.

Include small jobs, favours and the extras you added without charging.

Which of these took the most time, and which brought the most money?

Use your invoices and your memory of the team's weeks, not a feeling.

What do you want to stop selling, or sell only inside a larger package?

Work you dislike, work you do badly, work that never leads to a second project.

☐ I have checked the list against my invoices, not only against my services page.

☐ I know which services clients ask for first, and which ones they buy after.

The first one is your entry package. The second ones are your next steps.

02

Group them into packages

Three to five packages are enough for most agencies. Each one answers one need a client can name.

Name each package and say who it is for, in one line.

Example: "Launch: for a small business that needs its first proper website." Use words your clients use.

Which package is the usual first purchase, and which one comes next?

A path from first package to monthly work keeps clients longer than a menu does.

Which package is monthly: support, care, growth work?

Monthly packages smooth your cash flow; a client often starts one after a build.

☐ Each package solves one need a client can describe without our help.

☐ No two packages overlap so much that a client cannot choose.

If you have to explain the difference at length, merge them.

☐ We have an entry package that is small enough to say yes to quickly.

A paid discovery or a short first phase lets both sides test the relationship.

03

Outcome and scope, package by package

Write the scope as a list of deliverables. Promise what you control; measure the rest with the client.

Package 1. What does the client have at the end? List the deliverables.

Pages, screens, files, accounts, documents, training. Things you can hand over, not results you hope for.

Package 1. What is not included?

Content writing, photos, translations, hosting, ad budget, extra languages. Writing it here saves an argument later.

Package 1. What must the client provide, and by when?

Logo files, texts, access, a decision maker who answers within a set number of days.

Packages 2 and 3. Deliverables, exclusions and client inputs.

Repeat the three questions above on a separate sheet if you need more room.

☐

Every scope is written as deliverables, not as promised results.

"A website with five pages and a contact form", not "more clients".

☐

Every package lists what is out of scope.

04

Phases, milestones and revision rounds

A package your team can deliver the same way every time is a package you can price with confidence.

Split each package into phases. Name the milestone that ends each phase and the week it usually lands.

Example: brief approved (week 1), design approved (week 3), site live (week 6).

How many revision rounds are included at each milestone?

Two rounds per stage is a common starting point. Write what a round is: one consolidated list of comments.

What counts as a change request instead of a revision?

A new page, a new feature, a changed direction after approval. Changes are quoted in writing before work starts.

Which tasks does each phase contain, and who on the team does them?

This list is how you check your price against the time the work really takes.

☐ Each milestone ends with a written client approval.

☐ Our proposals and agreements say how many revision rounds are included, and what happens after them.

05

Payment schedule per package

The schedule matters as much as the price. Aim to be paid before the work, not after it.

Write the payment schedule for each one-time package.

Common shapes: half at signature and half at launch; three parts tied to milestones; a short discovery paid in full at the start.

How are monthly packages paid?

In advance at the start of each month is common; an annual option can include a discount you decide.

When does work start: at signature, or once the first payment arrives?

What happens when a payment is late?

A reminder schedule, then a pause on the work. Write it in the agreement so it is never personal.

☐ Every one-time package starts with a deposit before any work.

☐ Each payment is tied to a milestone the client approves, or to a date, never to "when it's finished".

06

Your prices and your minimum

Now write the figures. Start from the time the work takes and the margin you need, not from what a competitor charges.

Package 1: your price, in each currency you invoice.

Blank on purpose. Check it against the phases and tasks in section 4.

Package 2: your price, in each currency you invoice.

Package 3: your price, in each currency you invoice.

How did you reach each figure? Hours per phase × your cost per hour, plus your margin and a buffer.

If you cannot explain a price to your team, you will struggle to defend it to a client.

Your minimum engagement: the smallest project you accept.

Below it, refer the client to a partner, or offer the entry package.

☐

Prices are written in one place and only the people who need them can see them.

Delivery staff need the scope; they rarely need the fee.

☐

We review prices on a set date each year, using the time we really logged.

07

When a client says “too expensive”

It is usually a question about value, scope or timing. Answer the question; don't drop the price first.

When the client says the price is too high

Thank you for telling me, [first name]. Can I ask what you are comparing it with? The [package] includes [two or three key deliverables], [number] revision rounds at each stage and [support after launch]. If the budget is the limit, we can look at a smaller first phase, [entry package], and plan the rest for later. Would that help?

When the client asks for a discount

I understand. Our prices follow the time each package takes, so we don't lower the price for the same scope. What we can do is adjust the scope: for example, remove [item] or move [item] to a second phase. Would you like me to send that version?

When the client wants to wait

That makes sense. So you can plan, the proposal stays valid until [date], and our next start date is [date]. I'll check in on [date]; if anything changes before then, just reply to this message.



Everyone who sells has these answers, and nobody gives a discount without changing the scope.

Your three packages on one page

PACKAGE	OUTCOME AND PHASES	PAYMENT SCHEDULE
1		
2		
3		



— GO FURTHER

Learn the whole method in **Qafza Academy**.

Qafza Academy is the method we use to sell, deliver and keep clients, written down as twelve lessons for agency owners and their salespeople. Two of them go deeper into what this worksheet starts: turning services into packages, and the pricing logic behind payment schedules. Each lesson comes with a checklist to apply in your own agency.

- Turning services into packages: phases, milestones, revisions
- Pricing logic: payment schedules that put cash before the work
- Discovery calls, proposals clients sign, and the follow-ups
- Onboarding, delivery, change requests and getting paid

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Qafza designs and builds brands, websites and software, and teaches agency owners the method it runs its own agency on through Qafza Academy.