Majority Media

PATHBUILD™ · SAMPLE DELIVERABLE EXCERPT

Offer Structure & Positioning

Two excerpts from a PathBuild™ engagement: the rebuilt offer lineup and the positioning and messaging framework.

ILLUSTRATIVE SAMPLE Northfield Ledger Co. is a fictional business. This excerpt shows the format and depth of the deliverable. It is not client work, and the figures are invented for illustration, not results.

The business at a glance

Business	Northfield Ledger Co. (fictional)
What it does	Bookkeeping and payroll for small trades businesses: contractors, landscapers, cleaning companies
Team	Owner plus two part-time contract bookkeepers
Clients	38 monthly clients, most billed hourly
Diagnosis	PathEval™: Change on positioning & offers and on operations & capacity; Keep on marketing & sales

1. Where the offers stood

The diagnosis found nine variations of the same service, mostly billed by the hour. Clients couldn't compare options, the team couldn't predict its workload, and extra requests were rarely billed.

What we found	Why it mattered	What changes
9 service variations, priced case by case	Every quote was a custom conversation	3 packaged tiers with fixed monthly prices
Hourly billing on 30 of 38 clients	Unbilled extras and unpredictable invoices	Monthly pricing with defined limits
Catch-up work bundled into monthly fees	Large one-off jobs priced like routine work	Cleanup sold as a separate project
"We do books for small businesses"	Sounds like every other bookkeeper	A clear niche: trades businesses

2. The new offer structure

Three tiers, each built around what the client gets, with clear limits so scope stays predictable.

Tier	Who it's for	What's included	Monthly price
Monthly Books	Owner-operators with no employees	Monthly reconciliation and categorization, up to 150 transactions, monthly P&L	$450

Tier	Who it's for	What's included	Monthly price
Books + Payroll	Trades businesses with a crew	Everything in Monthly Books, payroll for up to 10 employees, payroll tax filings	$650
Books, Payroll + Review	Growing businesses making decisions	Everything in Books + Payroll, a quarterly review call and a cash-flow forecast	$950

Add-ons and projects

Offer	When it's used	Price
Catch-up cleanup	New clients whose books are behind	From $1,200 (project)
Year-end package	Year-end close and accountant handoff	$600 (once a year)
Extra transactions	Monthly volume above the tier limit	$1 per transaction

Retired

- Hourly billing for monthly clients (existing clients move to a tier at renewal)
- The six custom service variations folded into the three tiers

3. Positioning and messaging framework

Element	Framework
Audience	Owners of trades businesses (2–15 people) who run the work and don't have time for the books
The problem	Books that are always behind, so pricing, payroll and tax decisions get made on guesswork
Positioning	The bookkeeping firm built for trades businesses: books that stay current, so owners can price jobs and pay their crews with confidence.
Why Northfield	Trade-specific setup (job costing, crew payroll), fixed monthly pricing, a named bookkeeper on every account
One-liner	Bookkeeping and payroll for trades businesses, at a fixed monthly price.

Message pillars

Pillar	What we say
Current, not catching up	Your books are reconciled every month, so you're never guessing what you made.
Built for the trades	Job costing and crew payroll set up the way your business actually runs.
No surprise invoices	One monthly price, with clear limits and no hourly billing.

Words to use, and to retire

Use	Retire
current books, job costing, your crew, fixed monthly price	full-service solutions, financial partner, synergy, "we do it all"

4. Buyer’s journey snapshot

Stage	What the buyer needs	What gets built
Notice	To recognize the problem as theirs	Trade-specific homepage headline and three pillar pages
Compare	To see the options and prices	A pricing page with the three tiers side by side
Decide	Confidence it fits their business	A 15-minute fit call booking page with an intake form
Start	A clear first month	Onboarding handed over to PathOperate™ (see that sample)
Stay	To see the value monthly	A monthly P&L email with a short plain-English summary

NEXT With the foundation in place, the diagnosis pointed to operations next. The PathOperate™ sample shows the onboarding and SOPs built for these tiers.