

Offer & Pricing — LetsDoSales

Launch pricing (first 2 clients only — the discount buys proof)

\$500 setup + \$750/month, on a 60-day paid pilot. Not free. A free client doesn't cooperate, doesn't measure, and gives you nothing you can publish.

In exchange, the client agrees in writing to: - a written testimonial at day 60, - permission to publish the before/after numbers, and - two referral introductions to other firm owners.

Pilot clients move to standard pricing at day 61. Do not grandfather the pilot rate.

We have no accounting client yet. Until one exists, the pilot rate *is* the offer — don't apologise for it, and don't invent a case study.

Standard pricing

Tier 1 — Document Chase (the wedge) - **\$1,800 setup + \$800/month** · up to 150 clients · live in ~1 week - Builds each client's expected-document list, detects what's missing, sends reminders naming the specific outstanding items, escalates to the partner on silence, logs every touch.

Tier 2 — Onboarding + Chase - **\$3,200 setup + \$1,200/month** · up to 300 clients - Everything in Tier 1 plus new-client onboarding: engagement letter, checklist, collection confirmation, and a file marked ready before a preparer ever opens it.

Tier 3 — Deadline Command Centre - **\$5,500 setup + \$1,900/month** · unlimited clients, multi-partner - Everything above plus every filing deadline across every client on one calendar (T1, T2, T4/T5, GST/HST, instalments), live ready / not-ready status, and an audit-ready export.

Why \$800/month clears the bar

The arithmetic is the pitch. Firms report **5+ hours a week** coordinating document requests during season. At a loaded senior rate of roughly \$70/hour that is about **\$1,500 a month** of the most expensive time in the building — spent on chasing paper. \$800 is a little over half of one month's waste, and it lands on the line where the pain already is.

Market reference: small-business automation retainers run **\$500-\$3,500/month**, with setup fees of \$1,500-\$5,000. Accounting firms are price-sensitive, so Tier 1 deliberately sits at the low end of the retainer band with the setup fee carrying the effort.

Rules

1. **Annual commitment, monthly billing.** Month-to-month churn kills agencies.
2. **Setup fee is non-refundable and paid before the build starts.**
3. **Usage costs (SMS, email volume, AI usage) billed at cost + 15%.** Never absorb them.
4. **One workflow per tier.** Anything new is a change order — "that's a great idea, here's what it costs", never "sure, I'll add it".
5. **No performance guarantees.** Guarantee the system works, not their revenue.
6. **First month is the proof month.** If the agreed numbers don't move, we work free until they do.

The data boundary — put this in the SOW, and lead with it in conversation

We track checklist status only. Client tax documents stay in the firm's own portal or

drive, and are never stored on our systems.

This is not a legal nicety, it's a sales weapon. It disarms the "are you PIPEDA-compliant?" objection before it's raised, it keeps the engagement inside Adil's own no-client-data rule, and it draws a clean line between us and a document-storage vendor.

What's explicitly excluded

- **Tax advice, tax treatment, filing positions** — we never touch the return
- Tax preparation or bookkeeping work of any kind
- Penalties, interest, or filing outcomes
- Their internal staff behaviour
- Third-party software licences (TaxDome, Karbon, Financial Cents, their portal)
- Document storage or archiving

The trap to watch for

Accounting firms will try to absorb us into delivery — "while you're in there, can you chase the *internal* review notes too?" That is bookkeeping work at automation prices. Every such request gets a price, or a no. We chase **clients**, not their staff.