

Raising margins. Strengthening your bottom line.

01 / DISCOVERY BEFORE DATA COLLECTION

Your existing pricing context

We use your existing pricing approach to find invoice-backed margin gaps and practical actions. This review does not design pricing strategy, new matrices or segmentation.

For the initial conversation: describe the business question, the area and period to review, and which records are available. No confidential figures or full extracts are needed at this stage.

01 How do your current pricing matrices work?

What do the rows, columns and rules represent: customer, segment, vendor, product family, branch or quantity? Which rule wins when more than one applies?

02 How do you arrive at vendor list prices?

Do you use vendor-published lists or an internal list? If internal, is it based on cost markup, target margin or another method? Where do FX, freight and rounding enter?

03 How are customers and products segmented?

What defines each segment, how is membership assigned and who reviews it? Do pricing tiers, discount levels or quantity breaks follow those segments?

04 How do agreements and exceptions interact?

How do contracts, promotions, matrix discounts and manual overrides interact? What exception or approval rules apply, if any, and where are decisions recorded?

05 Who maintains prices and when do they change?

Who owns list updates, matrix changes and segment assignments? How are effective dates, old versions, vendor increases and expired agreements handled?

06 Which actions could your team take?

Which customer commitments and practical constraints matter? Who can confirm a finding and act on it? Which corrections would be useful and manageable for your team?

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02 / SELECT ONLY WHAT THE QUESTION NEEDS

Records for the agreed review

This is a menu, not an upload requirement. After the discovery discussion, we agree the smallest useful set of records, scope, fee and delivery date. Missing items can narrow the review.

01 Existing price rules and matrices

Relevant current and historical matrices, lookup keys, rule precedence, discount tiers, quantity breaks, floors and effective dates. A redacted worked example can help explain an unfamiliar system.

02 Existing vendor lists and price basis

Vendor list and cost files, the internal list-building method, markup or margin definitions, FX rates, freight assumptions and rounding rules. Include versions and update dates where available.

03 Customer and product context

Stable customer and item IDs, segment definitions and assignments, product families, vendors, branches and relevant commercial classifications. Identify who owns these mappings.

04 Invoice lines, costs, returns and credits

Dates, invoice and line IDs, customer and item IDs, quantities, units, actual net prices, currency and known acquisition cost. Include linked returns and credits; agree the period, often 12-24 months where useful.

05 Agreements and transaction adjustments

Relevant customer terms, exception records, supplier support and rebate terms, eligibility, claim windows, amounts booked, freight and credit references. Approval records are requested only where applicable.

06 Source controls and maintenance history

Extract totals by period and currency, known data gaps, system definitions and available price-change logs. State who can confirm the rules and explain how updates reach the sales process.

Agree handling before sharing. Confirm confidentiality, transfer method, access and retention. Share only agreed fields; omit unnecessary personal information. Do not send confidential extracts with the first enquiry.

Keep gaps visible. Unknown values are not zeros. A price, cost or credit difference is a question to validate, not an automatic entitlement or realized gain.