

■ FREE GUIDE · 1-PAGE OFFER TEMPLATE · 18 PAGES

Turn Your MSP Services into Products You Can Price

Answer 7 questions per offer, fill in one page, and launch your first productised service in 6 phases.

By Salesbuildr



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7

questions every offer must answer

1 page

product record per offer

6

phases to launch one v1

■ CONTENTS

What's inside

Seven questions, one page per offer, and the templates to package your first service.

01 Introduction

A portfolio is a promise you can keep

02 The P.R.O.M.I.S.E. framework

Seven questions every offer must answer

03 Why custom selling doesn't scale

The cost of vendor-led, bespoke selling

04 Choose the customer outcome & ICP

Jobs, triggers and constraints

05 Build the service blueprint

A one-page product record per offer

06 Design your portfolio architecture

Baseline + modules

07 Price the promise without losing margin

The price floor and the premium

08 Turn the portfolio into an operating system

From catalogue to billing

09 Sell the portfolio as a decision

The internal decision pack

10 Launch one v1 and learn

Six launch phases

A1-A3 Appendix: templates

Offer sheet, service catalogue entry, pricing worksheet

A4 Appendix: worked pricing example

The price-floor formula with every number shown

■ INTRODUCTION

A portfolio is a promise you can keep

A prospect asks for managed IT, Microsoft 365, security, backup, a new firewall, and maybe a migration. Sales assembles a bespoke quote from old templates and supplier portals. Delivery reads the signed PDF and asks what was included. Finance rebuilds the billing lines. Six months later, account management can't see what the customer doesn't yet have.

That is a collection of transactions.

Productisation is the discipline of turning recurring commercial promises into repeatable operational services that customers can understand, sales can sell, delivery can execute, and finance can bill correctly.

THE CORRECTION

Vendor stack → outcome-led tier → better selling and margin

Customer outcome → Defined promise → Commercial package → Operational design → Contract & billing → Evidence & evolution

■ THE CORE FRAMEWORK

The P.R.O.M.I.S.E. framework

Seven questions every productised offer must answer.

P

Problem

What customer situation, trigger, or business change makes this offer relevant?

R

Result

What outcome do you commit to enable: better, safer, faster, or more predictable?

O

Operating model

Which people, processes, tools, responsibilities, and service levels make the promise real?

M

Money model

What is recurring, one-time, variable, and subject to approval?

I

Inclusions & interfaces

Where does scope begin and end? What depends on the customer or a third party?

S

Success evidence

What proves onboarding success, service quality, risk reduction, or business progress?

E

Evolution

How does the offer version, expand, and retire over time?

■ CHAPTER 01

Why custom selling doesn't scale

The cost of vendor-led, bespoke, disconnected selling.

Bespoke selling taxes sales, delivery, billing, and growth for the entire life of the customer.

01**Sales**

Every deal is a one-off quote. Nothing repeatable to learn.

04**Procurement**

Supplier sprawl with no governed substitution.

02**Delivery**

Each signed PDF is re-interpreted. Scope drifts.

05**Account growth**

No one can see the gaps in the installed base.

03**Billing**

Finance rebuilds lines from the quote.

06**Positioning**

Selling a vendor list invites comparison.

Choose the customer outcome and ICP

Sell the job, the trigger, and the constraint.

SITUATION	TRIGGER	PORTFOLIO RESPONSE
Risk & resilience	Ransomware, insurer requirement, audit finding, new regulation	Security baseline, identity, backup/DR, monitoring, incident readiness
Workforce productivity	Hybrid-work friction, headcount growth, device inconsistency, M365 underuse	Modern workplace, device lifecycle, collaboration, endpoint management
Governance & compliance	Certification, customer audit, regulated vertical, privacy obligations	Compliance module, reporting, policy, vCIO / governance cadence
Change & modernisation	Acquisition, new site, cloud migration, incumbent replacement, aging estate	Discovery, remediation, migration, onboarding, project programme
Cost & operating discipline	Rising IT spend, vendor sprawl, internal IT overload	Standardisation, vendor rationalisation, managed-service foundation

The wedge: start with one ICP and one high-volume, high-margin outcome. Don't productise the entire MSP at once.

Build every offer as a service blueprint

A one-page product record turns productisation from branding into a reusable operating capability.

Secure Modern Workplace

WORKED EXAMPLE

TARGET CUSTOMER

Professional-services firms, 25–250 users, Microsoft-centric

CUSTOMER PROBLEM

Inconsistent devices & identity, rising cyber/insurance pressure

OUTCOME PROMISE

A secure, managed, measurable workplace, productive anywhere

INCLUDED SCOPE

M365 admin, endpoint, patching, helpdesk, identity, backup

EXPLICIT EXCLUSIONS

Major projects, legacy remediation, after-hours unless selected

COMMERCIAL RULES

Per-user minimums, term, setup fee, review terms, thresholds

SUCCESS EVIDENCE

Security baseline, onboarding milestones, SLA & reporting

VERSION

SWP 2026.1: owner + migration rules

The format is the productisation. The content is the current version of the promise.

CHAPTER 04

Design your portfolio architecture

Tiers are one pattern. Use a decision guide instead.

Clear standard baseline	One mandatory baseline package + outcome-led modules
Distinct maturity / risk profiles	Two or three clearly differentiated packages, each viable alone
Multiple verticals or customer types	Shared foundation + vertical solutions and evidence
Transformation / migration / change	Baseline + a separately scoped transition programme
Existing-customer growth	A capability roadmap: current vs target state
Standardise the minimum safe and profitable baseline. Modularise the legitimate sources of variation. Never turn critical controls into optional add-ons.	

CHAPTER 05

Price the promise without losing margin

Design from delivery economics. Price to value. You need both.

PRICE FLOOR

$(\text{Recurring delivery cost} + \text{required contribution}) / (1 - \text{target gross-margin rate})$

The number you are not allowed to go below.

COMMERCIAL PRICE

Price floor + value, risk, urgency & differentiation premium

Prevents pricing a meaningful outcome as a commodity.

PRICE EVERY COMPONENT EXPLICITLY

Recurring managed service

Per user, device, site, tenant, or workload

Third-party licences & hardware

Separate cost category and rule

One-time onboarding

Discovery, documentation, tool deploy, baseline

Consumption / overage

Out-of-scope, after-hours, variable cloud

Remediation / transformation

Technical debt, migration, security uplift

Risk & complexity premium

Legacy estate, regulation, transition risk

Never bury inherited complexity in recurring managed-service pricing. Identify it, scope it, price it, and resolve it as a transition or remediation programme.

■ CHAPTER 06

Turn the portfolio into an operating system

One offer definition must flow end to end, so a signature creates work.



If a signature forces your team to re-read the proposal to know what to do, the portfolio is not yet productised.

PORTFOLIO GOVERNANCE: TREAT IT AS A PRODUCT

MONTHLY Detect variance Margin by offer, discounting, support effort, SLA, exceptions	QUARTERLY Improve, version, retire Win/loss, utilisation, attach rates, feedback, vendor changes	ANNUALLY Review architecture & terms Supplier & labour costs, demand, positioning, indexation
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■ CHAPTER 07

Sell the portfolio as a decision

Productisation helps the buyer agree internally.

94%

of B2B buying groups rank their shortlist before they talk to a seller. A clear, named offer helps you get onto that list.

— 6SENSE B2B BUYER EXPERIENCE REPORT, 2025 · ~4,000 B2B BUYERS (NOT MSP-SPECIFIC)

A strong portfolio makes a strong, decision-ready proposal possible.

EVERY OFFER SHIPS WITH A DECISION PACK

- 1 Executive outcome & reason to act
- 2 Scope & operating model (IT / ops)
- 3 Risk, security & compliance story
- 4 Commercial model (finance / procurement)
- 5 Transition plan & dependencies
- 6 Evidence & success measures

Launch one v1 and learn

Six phases. Don't productise the entire MSP in a workshop.

1

Choose the wedge

One ICP, one high-margin outcome

→ Productisation charter

2

Discover the truth

Quotes, effort, revenue, discounting, exceptions

→ Economics baseline

3

Design the v1 offer

Blueprint, commercials, onboarding, evidence

→ Decision-ready offer

4

Pilot on new work

A few prospects or selected customers

→ Objection & handover learnings

5

Operationalise

Catalogue, templates, PSA, billing, reporting

→ Sell-to-deliver workflow

6

Expand deliberately

Modules, adjacent offers, vertical variants

→ Versioned roadmap

Start with one promise you already deliver repeatedly. Grow breadth only after v1 is profitable and stable.

■ CLOSING

Do not productise technology. Productise the customer promise.

A true MSP offering is a defined outcome with repeatable service design, protected economics, clear scope, executable handover, measurable success, and a path to evolve.

P.R.O.M.I.S.E.

Seven questions every offer must answer.

Baseline + modules

Never make critical controls optional.

Blueprint

One page per offer, versioned and owned.

V1 first

Version it like software, then expand.

ABOUT SALESBUILDR

Salesbuildr connects portfolio design to quoting, PSA execution, procurement, billing, and customer growth, so a signed promise becomes operational truth.

NEXT STEP

Book a Portfolio Readiness Review or the Productise One Offer workshop.

[Book a demo](#)

■ APPENDIX A1 • OFFER SHEET

Offer sheet template

One page per offer. If you can't fill a box, the offer isn't ready to sell. Sales, delivery and finance sign it off together.

P Problem

Which situation or trigger makes a client need this? (new site, insurer demand, staff growth)

R Result

What will be better, safer or more predictable after 90 days? One sentence the client would repeat.

O Operating model

Who delivers it, with which tools, at what service levels and hours?

M Money model

Monthly per user or device, one-time onboarding, usage items, licences. Which items need approval?

I Inclusions & interfaces

Included. Not included. What the client or a third party must do.

S Success evidence

What you will report: onboarding milestones, SLA, security baseline, review cadence.

E Evolution

Version number, owner, next review date, what triggers a new version.

— Offer name & target client

Name the offer by its outcome. Client size, vertical, platform.

Service catalogue entry template

Put each offer in your quoting tool and PSA exactly once, so every rep quotes the same bundle and finance bills the same lines.

FIELD	WHAT TO ENTER	EXAMPLE (FICTIONAL)
Offer name	Outcome-led name, as clients see it	Secure Modern Workplace
Version & owner	Version code, accountable person	SMW 2026.1 · service manager
Billing unit	Per user, device, site or tenant	Per user per month
Minimums & term	Minimum users, contract length, notice	10 users · 24 months · 90 days
Bundle contents	Each product and service line, with PSA code	Help desk, endpoint mgmt, M365 admin, backup, MFA
Shown to client	Bundle total only, or expanded lines	Bundle total, lines on request
Exclusions	What is quoted separately	Projects, hardware, after-hours
Add-on modules	Optional modules that fit this baseline	Compliance reporting, after-hours desk
Contract & PSA mapping	Contract type and billing lines it creates	Recurring contract, one line per user
Approval rules	Discounts or changes that need sign-off	Any discount over 10% → owner

Pricing worksheet

Work from the bottom up. Price one-time onboarding, remediation and licences on separate lines, never inside the monthly fee.

LINE	YOUR NUMBER	HOW TO WORK IT OUT
A · Labour per month		Hours per month to deliver × loaded hourly cost
B · Tools per month		RMM, backup, security tools per user or device
C · Other delivery cost		Storage, third-party services you pay for
D · Recurring delivery cost		A + B + C
E · Required contribution		Share of overhead and profit this offer must carry
F · Target gross margin		As a decimal, e.g. 0.45
G · Price floor		$(D + E) \div (1 - F)$
H · Premium		Value, risk, urgency, differentiation: as a % on G
I · Commercial price		$G \times (1 + H)$. Divide by units for the per-user price
J · Margin check		$(I - D) \div I$. Must be at or above F

The price formula with real arithmetic

FICTIONAL EXAMPLE

The Secure Modern Workplace offer from chapter 3, priced for a fictional 50-user client.

LINE	FICTIONAL EXAMPLE: 50 USERS	RESULT
A · Labour	25 hours × €48 loaded cost	€1,200
B · Tools	€6 × 50 users	€300
C · Other	Backup storage	€150
D · Delivery cost	A + B + C	€1,650
E · Contribution	Overhead share and profit	€450
F · Target margin	45%	0.45
G · Price floor	(€1,650 + €450) ÷ 0.55	€3,818 (≈ €77 per user)
H · Premium	Insurer evidence pack included: +10%	× 1.10
I · Commercial price	€77 × 1.10, rounded	€85 per user · €4,250 a month
J · Margin check	(€4,250 – €1,650) ÷ €4,250	61%, above the 45% target

Priced separately

Onboarding: 40 hours × €95 = €3,800 one-time.
Remediation of the old setup: scoped after the audit.
Microsoft licences: at cost on their own line.

All numbers are fictional and chosen to show the arithmetic. Use your own costs and margin target.

■ MORE FREE GUIDES

More free guides for MSPs

Keep going with the rest of the Salesbuildr library, written for MSP owners and sales leads.

PROPOSALS

Write MSP Proposals Buyers Can Approve

Structure, pricing and the decision pack that gets a yes.

SALES

The MSP Sales Playbook: From 2 Reps to 10

How to hire, train and run a growing sales team.

MARKETING

The 8-Step MSP Marketing Plan

A step-by-step plan for acquisition and expansion.

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