

Qualitative Research Guide for Optimizing Your Pricing Strategy

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This guide was written by expert behavioral scientist [Chris York](#) in collaboration with the behavioral science firm [Irrational Labs](#). Need pricing help? Reach out [here](#).

This is a qualitative pricing template. If you're looking to run quant WTP research, [here](#) is a template.

Pricing is more than a number

Pricing is never just about picking the right number.

It's one component of a set of stimuli and context that shapes the behavior of purchasing, upgrading or discontinuing a service over time. When considering all factors, the actual dollar amount may not even be the most impactful aspect of the overall experience that drives the purchasing journey.

Most B2B companies will need to figure out the structure of different plans and value metrics, the optimization of the monthly vs. yearly vs. quarterly, the buyer's decision-making process, the sales motion and positioning. Consumer teams, on the other hand, will need to figure out the setup around freemium vs free trial, what features are enabled vs. not, upsells and cross-sells and effective communication strategies.

Unfortunately, the Van Westendorp, feature preference matrices, or other quantitative pricing methods fall short in addressing these crucial psychological aspects of pricing and the buying experience.

After all, buying is a complex behavior embedded in an ever-evolving experience. It's not a one-off, rational decision grounded in economic cost-benefit analysis. And no one knows the "real" price that something should be, or can perfectly quantify the value it provides. People often rely on heuristics to evaluate what something "should" cost.

What's more, pricing isn't always about maximizing immediate value or growth. It involves strategies for longer-term value creation that can drive net revenue retention.

Pricing can significantly change people's behavior. We see this everywhere from peak-hour rates in transportation to surcharges for premium entertainment. So it should come as no surprise that variable and usage-based pricing happens regularly in tech companies. OpenAI recently announced that for certain plans, they'll charge different rates or allow different usage caps during peak and off-peak times. Much like public transit, they rely on the idea that when pricing changes, behavior changes, too.

Pricing matters.

[Zapier](#) previously offered a free plan limited to 5 workflow automations. [As of an early 2024 pricing refresh](#), free plans now have unlimited automations. Removing this usage cap enables people to experiment widely to find a workflow that's valuable to them, which will likely increase the platform's long-term value for them.

In 2023, [Coda transitioned](#) from charging a per-seat rate to everyone in a company to charging a single higher rate for document "makers" while providing free editing and viewing access. This change resulted in increased adoption across companies, as free document editors started using Coda for core business processes. This shift significantly improved product expansion metrics. Although the average team's initial contact value with Coda may have decreased, the lifetime value likely increased due to greater total usage within the company.

The pricing strategy for a product can profoundly shape its usage patterns. In this guide, we'll dive into important considerations, methods, and best practices to fully leverage qualitative pricing research to help optimize the long-term value of your product and optimize user engagement.

APPROACHING QUALITATIVE RESEARCH



Inputs for Your Question Topics

Approaching qualitative research for pricing can be tricky, but it's a crucial aspect of exploring a new pricing strategy. If you only do quantitative work, you're missing out on the purchase and use stories that underlie decision-making.

While there are many questions you should ask almost regardless of your product or service, the vast majority of them should derive from two things:

1. Your specific business objectives with respect to your pricing.
 - a. For instance, if you're trying to maximize upgrades or add-ons or conversion from free trial to paid versus trying to address retention, you would interview different cohorts and likely ask different questions.
2. Existing data/research is your customer data set or communications.
 - a. For a self-serve or direct-to-consumer company, this will often simply be the usage patterns of the product and any previously collected qualitative data, such as those in parts of a survey or during the cancellation flow.
 - b. For B2B products with a sales process, the content of sales calls, including upfront contacts with the prospect, all the way through the renewals, upgrades, downgrades, additions, and interactions with customer success or account management can be very fruitful data sources to find insights worth exploring more thoroughly in a structured interview process.



Recruiting Channels & Cohort Selection

In terms of recruiting participants, it's crucial to get the most representative sample possible. Typically, the best channels to recruit participants for qualitative research will be

those you already have, such as interviewing current customers from different segments, interviewing past customers who either turned or failed to convert from freemium or a free trial, interviewing leads from your various sales and marketing channels, and so on.

Generally, with qualitative, it's better to spend more time with a smaller number of people, for example, five one-hour interviews with one or two cohorts, rather than, say, 20-minute interviews with 15 people.

Usually, after about 5-8 people in a given segment, 80-90% of the content that you hear will be very repetitive, so it's rarely necessary to do more than this number of interviews, typically 30-60 minutes each. Unless there are many segments that you need to interview, or the buying process naturally entails a number of different personas, such as a product-led growth motion ending with a CFO conversation, you won't need to interview dozens and dozens of people.

That said, if this does apply to you, you'll often have to interview that number of people times the number of personas in the target company process times the number of companies or archetypes of companies that you're attempting to sell to.

Each segment may need a somewhat different script for the most part, and due to the factorial nature of the work here, it can become very resource intensive unless you scope things very tightly or only go deep on a few ICPs/segments/personas at a time.

So for example, five to eight individuals who project as the super user versus a more moderate user, or five to eight individuals each from a middle-aged female demographic that behaves differently than a much older male demographic, or five to eight individuals from the hospitality industry versus the transportation industry or government and so on.

For a simpler self-serve product, or a direct-to-consumer product, often you only need five to eight individuals for each different ICP or persona, and can generate a ton of insight from just 15 or so calls.

Often, you'll find you don't get to the most insightful parts of the conversation until toward the end when a strong rapport has been established, and you've developed enough context about the interviewee to ask the right questions. Motivational interviewing provides a great and evidence-based framework to rapidly get interviewees comfortable with the interviewer and delve deeply into exploring their problems and how they create cognitive schemas around addressing them.

While there isn't space to go into the details of motivational interviewing techniques here, we can provide a few links for further reading.

- [Invision Guide](#)
- [Testing Time Guide](#)
- [UX Design Guide](#)



Crafting the Script

Qualitative interviewing is a very company-and-problem-specific endeavor. These questions are hard to standardize, and at least 80% should be tailored to your company's specific data and objectives.

For example, why do people with these characteristics tend to convert on feature add-ons, while a group that's similar on most dimensions almost never does? Developing robust questions can enable you to address structural issues in aspects of the pricing experience, such as how plans are named or presented, or the structure of a referral program. Perhaps you need to introduce incentives that are different for different IBPs/ICPs.

But you'll need to focus on crafting these questions from the data you have to really zero in on the current issue. While it's okay to craft a hypothesis about why someone isn't converting in a certain cohort, or that shifting your value metric from one to another would be better, it's important not to get too heavy handed with the questions here and leave it very open-ended.

Regardless of the question topic, avoid asking people to predict their behavior. When asked to predict our future behavior, we tend to think about the ideal version of ourselves and discount the opportunity cost of our decisions.

Focus qualitative questions on getting people to React or Reflect.

1. **React** to something specific in the present (like a proposed pricing model or example feature add-on, or describing how they quantify the value of another SaaS product they use). You can also get them to compare multiple versions of

something and discuss tradeoffs.

2. **Reflect** on things from the past (e.g. their own purchase behavior, their company's purchase behavior or another company's pricing change process or announcements).

Here's a flavor of the category of questions you may want to ask. Specific versions of these questions are listed in the catalog below.

1. **Comprehension: Do they get your pricing and product?**

- a. Do people understand your value metric and value-based pricing strategy? Ask them to describe it to you.
- b. Show them pricing plans. Have them explain the different pricing plans to you to gauge understanding.
- c. Get them to unpack the time spent deciding between plans. Figure out if and where they struggled to choose which one to get.
- d. Ask them to show you how they refer or describe how they refer and the challenges they have in describing the product to those they are trying to refer.
- e. Ask them how they have described the products internally, to understand how the user communicates the value they get from the platform to others in the organization. So for example, how a designer communicates the value of figma or a subscription to their team leader or CFO.
- f. Have them show you how they use the product and talk through how they arrived at the moment of understanding the product early on.

2. **Attention: Do people know the options?**

- a. Assess if they're aware of your plans, upgrades, and add-ons. Ask them to reflect on how they've evaluated them or have them show you the process they used or would use.
- b. Figure out if people are aware of the referral program, their progress against certain milestones and how excited they are about the various incentives they might get

3. **Decision-Making: How does the sales process happen?**

- a. Have them explain how a discussion within a company operates for products with a partial self-serve and formal sales process, issues with activation in a free trial or freemium context. Have them map out how

people evaluated the process of renewing, downgrading or upgrading their plan.

- b. Ask how people benchmark or anchor the product and its pricing versus other products that they are choosing to buy. One great example is asking the purchase decision maker to compare the value that they get to their most expensive or highest perceived value software, benchmarking that to 100 and asking them to compare how yours stacks up.
- c. Get people's experience with understanding and evaluating pricing for other products, especially those that they've upgraded or downgraded are spending a lot of money on.

4. Actual Behavior: What specifically happened with pricing and product?

- a. Capture people's actual experience with differential pricing or usage caps and how these influence their behavior.
- b. Capture people's experience using or not using a certain feature.
- c. Get people to reflect on their experience with pricing changes on other products, especially how these were announced. Get them to explain how significant changes to the value metric or way plans were built influenced their behavior (e.g, if they had to restructure how they used a product based on the changes in the billing structure and so on).

PRICING RESEARCH CHEAT SHEET / DO'S & DON'TS

- Use a B2B enrichment app like [Clay](#) or hire a research or executive assistant to pre-populate information about each interviewee so you can ask targeted questions about other products they use (e.g. from BuiltWith or manual research) and get more concrete feedback; you can also create cohorts this way by finding interview candidates who all experienced a recent pricing change from a commonly-used product (e.g. DBT, Zapier, etc) by filtering on this column/parameter.
- Set up your scripts to pull information from Clay, LinkedIn or Twitter scrapers, or manual research so you can start the conversation with a point of common ground for each interviewee and personalize the script, when possible (e.g. we went to high school in the same city, we used to work at the same company, my mom lives in the city of your company's HQ, etc; white lies are also acceptable here to drive rapport and improve answer depth/quality); this can be done via concatenating a generic script in Google Sheets/Airtable/Notion/Coda with interviewee-specific values like location, common ground strings, product usage data, length of time using the service, etc.
- Always automate a follow-up email (bonus: personalize the email via an LLM drawing from the interview transcript), and mention the interviewee can email with additional thoughts/feedback.
- Use a service like Dovetail, EnjoyHQ, Grain, etc or manually recreate this with a custom transcript → LLM workflow (e.g. Firefly → Airtable or Notion AI columns for data tagging/insight extraction).
- Never, ever have the same person doing the interview and taking notes at the same time.
- Aim to begin your scripts by prompting the interviewee to be as honest/brutal as possible; great ways to do this often entail saying things like "I didn't design the product/create the pricing, so you don't need to worry about offending me if you hate on it" or "My last interviewee was a little too nice, and the more criticism you bring, the more it helps me and the team—plus we have thick skin" or "Personally, I

think [our tagline/our dashboard UI/our logo/etc] is terrible, and other people on the team have actually appreciated when I've pointed it out" (pro-tip: you can lie about being uninvolved with the product or pricing, or about a recent interview, or about something you dislike, if necessary).

- Be very careful how you order your questions, since it can dramatically impact the responses (assume early questions with less rapport will get less detail, answers get better toward the end but can deteriorate towards the end of the interview time slot, asking about positive/negative experiences can influence subsequent questions accordingly, and significant context switches will detriment answer quality on the new subject).
- Start with something relatively easy to answer to get things going; don't jump directly into a very complex or abstract topic.
- Don't be afraid to jump around the script topics or disproportionately explore one topic with someone who has a ton of data on that specific area; the goal isn't to be 100% homogenous but rather to extract the most insight possible — interviewees can have VERY heterogeneous experiences, greater willingness to talk about some things vs. others, or dramatic differences in insight on certain topics.
- Generally prefer 1-1 interviews, always avoid focus groups since social dynamics create unfavorable/unreliable data, and consider interviewing in dyads (i.e. one interviewer and two unrelated interviewees); in some research scenarios, interviewees provide much better data when piggybacking on another person's insight or experience, yield more in-depth answers when their criticisms/experience is normalized by another person, or feel more comfortable with the dynamic when they outnumber the interviewee.
- Don't ask leading questions; keep it open ended (often the best questions aren't even questions, but prompts like "Tell me about a time when..." or "It looks like you were impacted by Company X's recent pricing overhaul.")
- The best questions are almost always follow-up questions that double-click on a specific insight or thread the interviewee has offered; don't be afraid to keep the script mostly general and plot out a few different "branches" of follow-up questions for each major topic, rather than scripting every interview the same.
- Don't interrupt people if there is a short silence; make sure to give them space to think things through and find the right way to describe their experience/thoughts.

- Absolutely interrupt people if they get into subject matter that isn't useful; give them a moment to get back on topic, but make sure to course-correct to something important since time is limited and interviews are expensive.
 - Be specific when attempting to elicit details about an experience; e.g. ask about their recent upgrade and mention the sales/account person they talked to by name, ask about a specific product they use that recently overhauled pricing, etc... or ask them to think of an example of something with very clear parameters, and then go deep into that examples (e.g. "When was the last time you canceled a [type of service] or [subscription with cost of X]. ... Tell me how that process went down.")
 - Avoid asking many super general/theoretical/philosophical questions. E.g. don't ask "How do you typically think about whether a product's pricing is aligned with the value it creates?" Instead, ask about their specific experience in a real, ideally present or recent situation implied by the question. E.g. "What was the last product a department asked to purchase where you decided against it? How did that play out?" A couple broad questions are okay, but these should be the minority—used mainly to elicit concrete details to explore in greater depth.
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MEGA REPOSITORY OF QUESTIONS BY RESEARCH OBJECTIVE

CAVEAT LECTOR

These questions and prompts are meant to inspire you and illustrate how you could approach specific research goals. They're not intended as a plug-and-play script. You should craft your questions based on specific patterns in your customer data set, previous sales or customer success call themes, actual details around your product and buyer experience, and company objectives vis-a-vis pricing or targeted user behaviors.

Remember, these questions or nudges are merely to get the interviewee talking, and the best insights will typically be yielded by follow-up questions you come up with in real time, or asking things like "What else?" or "Tell me more about that."

These are examples of the kind of questions or prompts you might use to generate insights, not the actual language you should use. When crafting actual language, customize it to your product. Overall, the questions are aimed at eliciting reaction and reflection. Remember to avoid focusing on abstract things and prediction questions.



Objective: Elucidate the anchoring process and valuation schemas around a product.

- What's the most expensive product that you pay for, or your team pays for?
- How valuable do you think it is? Assuming it's a 100 on the value scale, or if not, go with another product that you think is more valuable but costs less.

- What's the second most valuable product out of a 100? What makes you say that?
- It looks like you also use product Z. On a scale of 1–100, how valuable do you think it is compared to products X and Y?
- Where would you put our product in terms of its value versus those? What makes you say that?
- Is there anything we could do that would add 10 or 20 to that number?
- Out of all the other products you use, what product do you think ours is the most similar to, in terms of how valuable it is?
 - How much do they charge and what does their billing structure look like?
 - Do you think they are overpriced, underpriced, or about the same?
 - If you could change their pricing, how would you change it other than simply making it cheaper?
 - How do you feel the value our product helps you or your team create compares to that product?
- If you had a super tight budget and had to cancel three of the products you currently pay for, which ones would you pick?
 - Why?
 - Any others?
- Imagine that all the pricing people at all the companies whose products you use listened to a podcast about raising prices at the same time, and they've all decided to double their pricing in the same quarter.
 - Which companies would you still use their product even if the pricing doubled?
 - Which ones would you cancel immediately?
- If you had to describe our product to a colleague who wasn't familiar with it using a metaphor like, for example, it's like Salesforce for X, or it's like a cross between

Airtable and Zoom, or it's a cross between Google Sheets and Asana, how would you describe it?

- Can you think of an alternative way to describe it if they hadn't heard of that app or those apps you just mentioned?
- When you think of those products or apps you just mentioned, do you generally think they're super expensive, inexpensive or accessible, or somewhere in the middle? If you don't know or don't have a strong reaction, that's fine too.



Objective: Evaluate the value metric or usage-based pricing metric.

Best in class method: Mock up multiple pricing pages that show different options for your value metric when asking these questions. Getting people to react to something real and talk about tradeoffs will help people avoid abstract and wishful thinking commentary.

- As you know, our product builds based on the number of X (e.g. automations, emails sent, doc makers, users, call transcripts generated, hours of processing, etc). Explain why this metric makes sense for your company. Explain why it doesn't make sense for your company. Where do you lean and why?
- If you had not known that we charge based on the number of X, what would you have initially expected (other than per user)?
- If a law were passed that companies can't bill based on X anymore and we had to charge on another metric, what would make the most sense?
- Explain how you and your company projects how much the product will cost based on metric X? How confident are you in this projection?
- How much does metric X align with what's useful to your team or KPIs or how you create value in your business?
- Are there other products you use that build on metric X? Tell me about them.

- Are there products you've used where they've switched from metric X to something else? Do you prefer it before or after that switch?
- If you could get charged only when certain things happen or when a certain outcome or result is achieved, what would you price for?
- If another product bills on metric X or something similar and you could change its pricing other than simply lowering the cost, how would you change it?



Objective: Consider if a major feature should be a separate product or add-on rather than part of the core product.

- How do you or your team use Feature X? Describe your workflows.
- What does Feature X enable you or your team to do? Imagine you were explaining the feature to someone you just hired on your team who you're training to use the product.
- Considering all of the different features of product Y, what percentage of the value of the product do you think is represented by Feature X? For example, is it 1%, 10%, 90%, or what portion of the total value?
- If Feature X was a separate product, what do you think is the likelihood you would cancel the rest of the product and just buy Feature X?
- How does Feature X help you or your team hit your KPIs?
- How does Feature X or how do those KPIs help the company make money or deliver value for your customers?



Objective: Explore constraints or caps around the value metric, usage-based pricing metric, seat or role-based pricing, etc.

- On your current plan, we bill you X for every metric and give you up to Y uses or units of feature Z, after which you have to pay. What concerns or questions did you have about this before purchasing? What was confusing?
- In the past year, have you found this cap frustrating or has someone on your team talked about being limited on it?
- Are there certain things within the product that we charge as add-ons that you aren't using because they cost too much? Or what you feel should be included or free?
- Taking into account the metric X that we bill for, do you feel all of metric X are created equally? Do you think it would make more sense to pay for some of these but have others be free or pay a different price for some of these and a lower or higher price for other ones?



Objective: Determine if plans are correctly segmented and positioned.

- When you look at our current plans or a set of potential new proposed plans, is it obvious which one applies to you?
- Who do you believe should be using the other plans? Please describe them.
- What questions would you have about the usage caps before you purchase? Do the usage caps or cut offs and the features in each of the plans align with what you would expect?
- What changes would you make to how the plan is described or what the features and usage cut off caps might be?



Objective: Decipher factors, causes, and contexts that influence upgrades, add-ons, or other revenue expansion behaviors.

- When you made the decision to upgrade from plan X to plan Y...
 - What was going through your head at the time?
 - How did you make the decision?
 - Were other people involved?
 - What roles did they play?
 - Was this similar or not similar to other experiences you've had when you've upgraded the plan on another service?
 - Why or why not? Better or worse?
 - Was this easy or painful to figure out whether you should switch plans? Why?
- On date X, it looked like you went over the limit on metric X for your plan and got billed additionally or upgraded to another plan. How did you find out about this?
 - Do you think you were notified at the right time? Was it too late?
 - How could it have done better in terms of communication?
 - Was there any data you wish were included in the messaging?
- Think about another product you've upgraded recently.
 - How did you evaluate it?
 - What was the process?
 - Who else was involved?
 - How are you monitoring whether the service is worth it?
 - If that service can be upgraded further or has additional feature add-ons, etc... How are you approaching that?
- Think about the last time where you ran into a usage cap or needed to switch from a free to a premium version of another app or service you chose not to upgrade. Can you think of a specific example?

- How did your thought process go?
- What did you not like about their pricing structure?
- What did you like or not like about the way they communicated around the upgrade or sales experience?



Objective: Optimize the positioning of the service, communicate the value it generates, and teach the customer the right mental model for evaluating it.

- Imagine you're talking to a friend who has basically the same professional role as you in a similar company about product X. How would you describe it to them?
- If you had to talk to someone else on your team, such as your manager, department lead, or CFO, to get them to pay for the product, how do you describe it to them and justify the purchase?
- If a very junior person who just got out of school joined your team and reported to you and had never heard of product X, how would you describe it to them?
- Are there any products you use that you believe have amazing positioning or describe themselves perfectly?
 - Why do you think that's a great way to explain themselves?
 - Can you think of ways to improve their marketing or positioning, or how they talk about their product?
- What product do you use / pay for that you really like, but think they describe themselves terribly or where you didn't understand what the product was at first?
 - If you had to give some advice to their sales or marketing people on how to improve the way they describe themselves, what would you tell them?
- In terms of other products you use, which do you think are the most similar to product X, and why?

- What other products do you pay for that cost around the same or have a similar billing structure to product X?
 - Which ones of these do you think are more valuable or less valuable and why?
- What do you think is the most overpriced product you or your team uses and pays for?
 - Why do you keep using it or paying for it?
 - What do they charge?
 - How much do you think would be actually fair?
 - At what price would you actually consider canceling?
- Other than free services, what do you believe is the most underpriced product you currently use and why?
 - What do they charge?
 - How much would you pay for it?
 - At what price would you actually consider canceling?
 - What do you think is the most underpriced product you have?



Objective: Analyze the experience and mental models in evaluating products with complex pricing structures.

- What product do you pay for that you think has the most complex or difficult-to-understand pricing structure?
- How did you go about evaluating it or figuring out the cost or projecting it? Say more...

- Imagine they changed one thing about their pricing, and now it's much easier to understand. What do you think they'd actually change?
 - What would you change?
 - Is there anything else you would change about their pricing plans or billing structure?
- Are there products you've paid for where they've switched to an easy-to-understand pricing model to a complicated or hard to understand pricing model?
 - What did the before and after look like?
 - How well did they communicate it, in your opinion?
 - Does the more complex model make sense?
 - Were you surprised about how much it cost after the changes, either pleasantly or unpleasantly?
- Are there products you currently pay for where the pricing structure is a little bit complicated? For example, charging different rates for different types of users, charging a certain price up to a certain amount of a given usage metric, and more after that, or charging different rates for different integrations, and so on?
 - Do you think their pricing makes sense?
 - Could you easily understand their pricing the first time you saw it?
 - Are there products you use that have complex pricing like this where the more complex setup makes it more fair, or actually makes sense despite the complexity?
- It looks like you or your team might use products X, Y, and Z. I think the pricing structure for X looks like this.
 - Do you think their pricing makes sense?
 - What would you change about the different aspects of the structure?
 - Let's do the same for products Y and Z.

- What products do you pay for that you think have the most aligned pricing? For example, you pay basically 100% in proportion to how much value it generates, and don't pay for people that aren't using it, actions in the product that don't actually help your team create value, and so on.
- Where does our product fit in your team's workflows as far as connecting to your team's revenue/KPIs,
 - How does it fit in terms of connecting to the value provided to your customers?
 - If we could charge you only when our tool is helping you make more money or helping your customers get a direct benefit, what's the thing you think we could charge for?
- What's the most important metric or north star metric for your team/company and your product/business?
 - How direct vs. circuitous is the relationship between our product and that metric?
- What are the most important things people on your team have done to move the needle toward that north star metric in recent memory?
 - How did that unfold or play out?
 - What tools did your team use to help do the work that drove that outcome?



Objective: Ascertain how your product and its value is communicated from one persona to another in multiplayer scenarios.

- So it looks like different people with different roles on your team all use the product together.
 - Who (what roles) tends to like the product and dislike it?
 - Why do you think that is?

- What are the most common complaints from groups A and B?
- What are the things people like the most from groups C and D?
- How did person/role X try to convince you to pay for the product?
 - Were there a lot of Slack messages, emails, a formal evaluation process, meetings, etc?
 - What were the most important things they said that convinced you it was worth paying for?
 - What were the important aspects you considered in determining whether it was worth the cost?
- Can you think of a recent time where you tried to convince person X (the decision maker, e.g., teammates, manager, CFO, spouse, parent, etc) to pay for a product like ours, and you really wanted them to do so, but they decided no?
 - How did you make the case?
 - Why did they tell you they chose not to pay for it?
 - What do you think you could have done differently to change their mind?
- Think about the last time you successfully convinced person X to pay for something like product X.
 - How did you go about it?
 - What things do you think you did or said had the most impact on them agreeing to foot the bill?
 - How easy or tough was it?
- How did this process compare to other times you've gone through the same process?
- When you do an annual or quarterly review of the things you're paying for, how does that process look?
 - How do you decide what to keep or cancel?

- What were the last similar (or more expensive) products you canceled or switched from, and why?
 - Were there other reasons or considerations?
- What was a recent decision you made where you did renew a product, but it was a really tough call where you had to kind of grind your teeth a little bit?
 - What made this a tough thing to evaluate?
- What's an example of something you renewed or upgraded where it was a no-brainer?
 - Why was the decision so easy?



Objective: Disentangle the process for renewal or upgrading across multi-year relationships with other products.

- What products have you/your team been using the longest? (Bonus if you can determine this from research beforehand and name specific options for them to choose from)
 - Have they changed their price over time?
 - When they've changed their price or changed how their billing works, what was the process where you evaluated whether to keep it or cancel and switch to something else?
 - Did you look at other products?
 - How strongly did you consider them, and how did you try to compare them?
 - How much did cost factor into it?
- What product do you use that has the most painful upgrade or renewal process?
- What products do you use and pay for that have raised or changed their pricing significantly over the years, but you kept with them?

- If you had to bet \$1M on which product you're using now that you've used for a couple of years that you'd still be using in 5–10 years, what product would you bet on?
- Is there a product you've been using for the last several years and paying for where you had to make the opposite bet? i.e., you'll bet \$1M that even though you might still be using it this year or next year, you WON'T be using it in 5–10 years. Which would you bet and why?
- What product have you been using the longest that you pay a lot of money for? (Bonus if you can name-drop from research)
 - Do they have direct competitors?
 - Imagine I offered you a certain amount of money and you had to switch to their competitor and you could never switch back. How much would I have to offer you?
- Imagine a product you use and have been paying for over at least a couple years that you like. They're offering a lifetime deal. How much would you pay to have access to it forever?
 - At what point is it a no-brainer? Where'd you get that number from?
 - And at what point is it kind of a little bit tough? Why does that specific number seem like a tough price point to evaluate?



Objective: Demystify differences in behavior, outcomes, or mental models between otherwise similar cohorts.

- So your team seems to barely use feature X and it's really, really popular with other companies like yours. They tend to use it for Y and Z use cases or benefits.
 - Have you tried to use the feature?
- It looks like you were using feature X and then stopped using it.

- Are you using another product to do this? Or how are you getting that job done?
- Who do you believe feature X was designed for? Or for whom does using it make sense?
- How would you describe this feature to other people in the company?
- Have you heard complaints from other people in the company about this specific feature? What were they?
- Do you use or like any other products that have a similar feature? Why is it better?
- You or your team are one of the top power users of feature X.
 - What problem is it solving for you or how is it helping you out in your day to day?
 - Other than people or companies just like you, who do you think would benefit from feature X and why?
- If you've had to explain feature X or teach someone how to use it within your company or the reverse if someone had to explain it to you and teach it to you.... What did they say, or what did you say to them?
 - How did the rest of that process unfold?
 - Was there anything that you initially didn't understand, or that they initially didn't understand?
- Imagine that a product manager at our company really wants to remove this feature. What would you ask me to tell them to convince them to keep it?
 - If they did remove it, what would you do instead?



Objective: Break down the cognitive cost of comparing competing products.

- Has there been an instance recently where you had to pay for a product and tested more than one option which were very similar or designed for the same use case?
 - Was their pricing and pricing structure almost the same or very different?
 - How did you evaluate them?
- Have you evaluated our product versus any of our competitors, or multiple other products that could be bundled together and achieve a similar solution?
 - How did you assess the costs and trade-offs?
 - Was it easy to compare the price or cost for these solutions?
- When you've compared two similar products, what is the most important thing in making your decision?
- What was the last time you switched from one product to its direct competitor?
 - How did that process unfold?
 - What motivated the decision?
 - How much did cost or pricing play into it?
 - What could the products have done differently to make the comparison easier?
 - Did you regret the switch? Why or why not?
- Can you think of an instance where you had to compare two similar products, but the way they did pricing or billing was totally different?
 - How did you compare them?
 - Which pricing or billing model made more sense, and why?



Objective: Appraise the trade-offs between price predictability vs. scaling costs with usage or value.

- With our product X or similar products, do you worry more that you're paying for things people will not ultimately use, or do you worry more that people will go over the limits of the plan and cause overage charges?
 - Which of these is worse?
 - Is it a different story with other products? Walk me through an example.
- In your specific scenario, you paid as low as \$X in month 1 and as high as \$Y dollars in month 7 this/last year.
 - Does this variation make sense or is it surprising to you?
 - If we billed for things a different way where the pricing was more consistent, what would make sense to you?
- In your specific scenario, you pay the same rate every month, but you had usage metric X at volume Y in month 3 and volume Z in month 8. Would you have preferred to pay more in month 3 and less in month 8 based on your usage, or is the consistent pricing more palatable? Why?
- If you could wave a magic wand and change the way your current pricing plan works, how would you change it?
- How surprised would you be if you were still using our product on its current plan five years from now?
 - If you expect to switch to something else, why or why not?
- Are there other products where you've prepaid for multiple years to lock in a certain rate and avoid price increases?
 - How did you evaluate those decisions?
 - Are you happy with the decision you arrived at?

- If you turned down the offer to make a prepayment for multiple years, what led you to make that decision?
- What could they have done differently that may have changed the outcome?



Objective: Decode the activation or non-activation of usage on certain features of the product.

- Your team is in the top 10% of people who use Feature X.
 - Why is Feature X important to you?
 - Did you start using Feature X basically right away or did you only discover it later on?
 - If it was someone else on your team, who discovered it or popularized it, and when did they start using it or hyping it?
 - There are some people who use our product who actually don't even know Feature X is there. If you had to tell them about it, how would you describe it to them?
 - Who do you feel would benefit from Feature X? Like what type of person, what type of company, etc.
 - Was it easy to figure out how to use Feature X?
 - Did someone else involve themselves in helping get it set up?
 - Is there one person or a small number of people on the team who are responsible for almost all of Feature X's usage? (Bonus points if you know this from the data and can name that person/team).
- If Feature X was taken out of the product, what would you do instead?
- If you could make Feature X different or add more functionality onto it for yourself/the team, what would we change?

- Other than people like you, who do you think would benefit from Feature X?



Objective: Probe the user journey and communications within the product are outside the product.

- You guys got some emails from us and it looks like you opened about 30% of them. What do you think of our emails and communication in general?
 - Do you read them or are they more relevant for someone else on your team?
 - How does it compare against other products you use?
- Are things going on within the product that you wish you knew about or were notified about? Like teammates doing a certain thing or background processes with connected services, etc, which we don't currently communicate to you well?
- Do you think we do a good job letting you know how much people are using the product or its various features?
 - Why or why not?
 - Can you think of any other product that does a great job of communicating usage or value created?
- Have you ever been blindsided by any of the emails or messages from our team about how much you are using the product or how close your usage has come to usage caps or plan limits?
 - If not by our product, has this happened with other products? How did it go down?
- What product do you think has the best overall emails or communications?
- What product do you use where you feel that their customer success, account management, or other teams do the best job?

- What makes them different?
- What are some examples of things they do which you appreciate?
- Other than products that don't send any emails or account or client success/account teams that never reach out to you, who do you think does the worst job of any product you are currently paying for?
 - What do you think sucks about their communication?
 - What could they improve?
 - Whose emails or text messages or push notifications are the worst or whose client success or account teams are the most annoying or least useful?



Objective: Inform the creation or refinement of referral incentives.

- It looks like you've referred [x people or y organizations] in the past.
- How did you figure out or identify who in your network made sense to talk to about the product?
- How did you reach out to them? Was it email, slack, in person?
- How often do you talk to this person and how well do you know them?
- How did you describe the product to them or the value that the product creates for you?
- After you initially mentioned the product to them, do you know how long it took before they decided to try it or have a conversation with us?
- As you know, we compensated you with X, dollar amount or experience or perk for this referral or these referrals.
 - Did you consider this a good deal? Why or Why not?
 - Would you have made the referrals without an incentive?

- If you could pick another incentive of any kind, what would it be?
- Have you referred other people to other products?
 - What was the best, most memorable or most generous referral incentive you've gotten?
 - Are there any examples of referral incentives from other products that you thought were terrible or that basically didn't motivate you to make the referral in any way more than if they didn't incentivize at all?



Objective: Reflect on experiences with other companies where pricing was significantly changed and communicated.

- We try to look up what apps people use since often people use so many it's hard to remember and keep track of them. This is probably wrong, or outdated but here are a few that it seemed like you or your team might use now or have used recently: X,Y, Z.
- Have any of these or other products that you've paid for overhauled their pricing significantly in the recent past?
- What do you think of the pricing changes? (Bonus if you can provide specific details to refresh their memory)
- Did you review or discuss it with other people on your team?
- How did reviewing the changes and deciding to stick with it vs. cancel/downgrade play out?
- Who do you think communicated a pricing change very well?
 - What did you appreciate about their communication?
- Can you think of any products that communicated it very poorly?
 - What could they have done better?

- Have you been offered things like the ability to lock in pricing by pre-paying for multiple years, being grandfathered into an older pricing plan, or similar preferential treatment?
 - How did the companies go about offering it?
 - When did it make sense?
- Were there instances when you were going to cancel a product where they offered some sort of preferential treatment or discount?
 - Did you accept or decline? And why?

Who is Irrational Labs?

Irrational Labs is a leading behavioral economics consultancy. We've worked with hundreds of top companies to apply behavioral insights and drive business outcomes.

Clients include Google, Intuit, TikTok, Meta, Gusto, Procter & Gamble, Credit Karma, Chime, LinkedIn, Microsoft, The World Bank, Netflix, Airbnb, Fidelity, Lyft, Uber, American Family, Kiva, and AARP.



Some of the types of outcomes Irrational Labs has gotten:

- We redesigned and A/B tested the onboarding and booking flow for One Medical, resulting in a **20% increase in appointments booked**.
- We designed an onboarding campaign for Meta for new advertisers that drove a **4.8% lift on post revenue**.
- For a remote medical exam kit client we re-designed SMS, calls, website, emails & app which drove product **utilization from 56% in 9 months to 77% utilization in 3 months**.
- Designed a savings feature for a fintech app that was projected via an experiment to **increase the aggregate income of its users by \$1M to \$2.88M**.
- We designed an **intervention for TikTok** that decreased misinformation sharing **by 24%**.
- We recreated an onboarding program for Google that **increased retention by 14%**.
- Designed **intervention for a fintech app** that doubled the linking rate of bank accounts (key KPI for US fintech). **This performed better than a \$10 incentive.**

- Designed a Bank's **onboarding** and **reminders** for auto loan customers, including payment enrollment, that [decreased defaults by 69%](#).

To drive these outcomes, our team uses Behavioral Design and the [3B Model of Behavior Change](#).

We can help you run qualitative pricing research to determine Willingness to Pay. Reach out [here](#).