

Pricing & Business Planning Tools

By: **DigitalProductHQ**

Table of Contents

Customer Question Tracker

Task and Deadline Tracker

Digital Product Pricing Calculator

Competitor Price Comparison Table

Cost and Profit Worksheet

Break-Even Calculator

Discount Impact Calculator

Monthly Revenue and Expense Tracker

Sales and Conversion Dashboard

Customer Question Tracker

Purpose of This Tool

Use this tracker to record the questions, frustrations, requests, and phrases you find during validation.

Do not rely on memory. Repeated patterns are much easier to recognise when the evidence is collected in one place.

Record the customer's words as accurately as possible, but do not collect private or identifying information without permission.

Product Idea Being Researched

Intended customer:

Research period:

From _____ to _____

Question and Comment Log

Date Source	Question, Comment, or Phrase	Underlying Problem	Action or Effort Shown
-------------	------------------------------	--------------------	------------------------

Possible sources

- Product review
- Marketplace
- Search suggestion
- Forum
- Online group
- Social media comment

- Email
- Customer conversation
- Informal interview
- Workplace discussion
- Other relevant source

Repeated Question Review

Which questions appeared more than once?

1. _____
2. _____
3. _____
4. _____
5. _____

Which question appeared most frequently?

How many times did it appear?

Where did it appear?

Frustration Tracker

What do people say is difficult?

What takes too long?

What do they keep delaying?

What are they worried about getting wrong?

What do they find confusing?

Current Solution Tracker

What methods or products are people already using?

Current Solution What They Like What They Dislike What Still Feels Unresolved

Customer Language Bank

Record useful phrases that describe the problem naturally.

“I do not know how to _____”

“I keep struggling with _____”

“The hardest part is _____”

“I have already tried _____”

“I wish there were _____”

“I am worried that _____”

“It takes too long to _____”

“I need something that _____”

“I do not want _____”

“I would rather _____”

Other useful phrases:

Desired Result Tracker

What outcomes do people repeatedly say they want?

1.

2.

3.

4.

Which result appears most urgent?

Which result appears easiest to explain?

Which result is realistic for a digital product to support?

Pattern Summary

Most common problem

Most common frustration

Most common failed or incomplete solution

Most desired result

Strongest sign that people are taking action

Important difference between customers

What this evidence suggests about my idea

Task and Deadline Tracker

Purpose

Large projects often feel overwhelming because they are seen as one enormous task.

Breaking the work into smaller actions makes it much easier to see what has been completed and what still needs attention.

This tracker helps you organise every task from the first draft to the finished product.

Section 1 – Master Task List

List every task that must be completed before launch.

Task	Priority	Estimated Time	Deadline	Completed
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐
	High ☐ Medium ☐ Low ☐			☐

Section 2 – Milestone Tracker

Every product reaches a series of important milestones.

Record yours below.

Milestone	Target Date Completed
Outline approved	☐
First draft completed	☐
Worksheets created	☐
Templates completed	☐
First review finished	☐
Editing completed	☐
Formatting completed	☐
Product tested	☐
Delivery files prepared	☐
Product ready for launch	☐

Section 3 – Priority Matrix

Not every task deserves the same amount of attention.

Place each task into one of these categories.

Important and Urgent

Important but Not Urgent

Helpful but Can Wait

Nice to Have Later

This exercise often reveals that some tasks can safely wait until Version Two.

Section 4 – Waiting For...

Sometimes progress depends on another person or another task being completed first.

Examples:

- Cover design
- Proofreading
- Feedback
- Printing test
- Software update

Waiting For Expected Date Follow Up Needed

Section 5 – Unexpected Tasks

Nearly every project creates work that was not part of the original plan.

Record those tasks here instead of trying to remember them.

Section 6 – Deadline Review

Before setting deadlines, ask yourself:

Have I allowed enough time for:

☐ Writing

☐ Editing

☐ Formatting

☐ Testing

☐ Corrections

☐ Exporting files

☐ Uploading products

☐ Final checks

Have I included extra time in case something takes longer than expected?

☐ Yes

☐ No

Are my deadlines realistic?

☐ Yes

☐ Probably

☐ Needs adjusting

Section 7 – Completion Review

When the project is finished, take a few minutes to reflect.

Which tasks took longer than expected?

Which tasks were quicker than expected?

What would I do differently next time?

Final Reflection

Looking back over the entire production process:

What am I most pleased with?

What have I learned that will make my next product easier to create?

Every completed product teaches something. Recording those lessons now means your next project can begin with greater clarity, better planning, and more realistic expectations.

Digital Product Pricing Calculator

Purpose

Use this calculator to develop a sensible starting price for your digital product.

It is not intended to produce one mathematically perfect answer. Pricing involves judgement as well as numbers. The purpose of this tool is to help you consider the main factors in a calm, structured way rather than choosing a price based only on instinct, fear, or what one competitor is charging.

Complete the sections using the information you currently have. You can return to the calculator after researching comparable products or calculating your costs.

Part A: Product Overview

Product name:

Product type:

- ☐ Ebook or guide
- ☐ Workbook
- ☐ Template
- ☐ Planner
- ☐ Spreadsheet or calculator
- ☐ Printable
- ☐ Toolkit
- ☐ Course or workshop
- ☐ Membership resource
- ☐ Other: _____

Who is the product for?

What specific problem does it help solve?

What result should the customer be able to achieve?

Part B: Usefulness Assessment

Rate each statement from **1 to 5**.

1 = Very low

2 = Low

3 = Moderate

4 = High

5 = Very high

Value Factor	Rating
The problem is important to the customer	____ / 5
The product saves the customer time	____ / 5
The product reduces confusion	____ / 5
The product helps prevent mistakes	____ / 5
The product provides a practical next step	____ / 5
The product is easy to use	____ / 5
The result is clearly defined	____ / 5
The materials can be used more than once	____ / 5
The product contains useful tools or templates	____ / 5
The product offers a more convenient solution than free information	____ / 5

Total usefulness score:

____ / 50

Interpreting the Score

10–20: Limited usefulness

The product may need a clearer result, stronger practical resources, or a more specific problem.

21–35: Moderate usefulness

The product may support a low-cost or standard price, depending on the market and what is included.

36–44: Strong usefulness

The product appears to provide a substantial practical benefit and may support standard positioning.

45–50: Very strong usefulness

The product may justify a higher standard or premium position, provided the customer, presentation, and market support it.

This score is a guide, not a rule. A simple product can still be valuable when it solves one important problem well.

Part C: Product Depth

Tick the description that fits your product most closely.

Focused Product

- ☐ Solves one narrow problem
- ☐ Can be used quickly
- ☐ Contains one main resource or a small group of resources
- ☐ Requires little explanation
- ☐ Is likely to be an entry-level purchase

Complete Product

- ☐ Solves a broader problem
- ☐ Contains guidance and practical tools
- ☐ Includes several related components
- ☐ Helps the customer complete a process
- ☐ Requires more time to use

Comprehensive Product

- ☐ Provides a complete system or extensive toolkit
- ☐ Includes multiple resources, examples, or templates
- ☐ Supports a significant personal or business result
- ☐ May include updates or advanced materials
- ☐ Offers substantially more than a simple download

The description that fits my product best is:

- ☐ Focused
- ☐ Complete
- ☐ Comprehensive

Part D: Market Price Range

After completing the Competitor Price Comparison Table, record your findings here.

Lowest relevant competitor price:

£/\$ _____

Highest relevant competitor price:

£/\$ _____

Typical price range for genuinely comparable products:

£/\$ _____ to £/\$ _____

Average or midpoint price:

£/\$ _____

Products with fewer features than mine generally sell for:

£/\$ _____

Products with similar features generally sell for:

£/\$ _____

Products offering more support or depth generally sell for:

£/\$ _____

Part E: Cost Floor

Use the Cost and Profit Worksheet to calculate these figures.

Estimated cost attached to each sale:

£/\$ _____

Estimated customer acquisition cost, where applicable:

£/\$ _____

Minimum profit wanted from each sale:

£/\$ _____

Minimum Sustainable Price

Per-sale costs

- customer acquisition cost
- minimum desired profit
= minimum sustainable price

£/\$ _____ + £/\$ _____ + £/\$ _____

Minimum sustainable price:

£/\$ _____

This is not necessarily the price you should charge. It is the approximate point below which the product may become difficult to sell profitably.

Part F: Customer Affordability

My intended customer is most likely to view the following as:

Price	Very Affordable	Reasonable	Requires Thought	Too Expensive
£/\$ _____	☐	☐	☐	☐
£/\$ _____	☐	☐	☐	☐
£/\$ _____	☐	☐	☐	☐
£/\$ _____	☐	☐	☐	☐

What is the customer likely to compare this purchase with?

How urgent or costly is the problem being solved?

Part G: Pricing Range

Based on usefulness, positioning, comparable offers, affordability, and costs:

My lowest sensible price is:

£/\$ _____

My strongest standard price is:

£/\$ _____

My highest currently justifiable price is:

£/\$ _____

My preferred starting price is:

£/\$ _____

Why does this price make sense?

Competitor Price Comparison Table

Purpose

Use this table to compare products that solve a similar problem for a similar customer.

Do not compare products based only on their titles. Look at what the customer actually receives, the depth of the solution, the creator's positioning, and any support included.

Aim to review at least five offers. Ten will give you a broader picture.

Comparable Offer Criteria

Before adding a product to the table, ask:

- Is it intended for a similar customer?
- Does it solve the same or a closely related problem?
- Is the format reasonably comparable?
- Does it offer a similar level of detail?
- Is it a standalone product, bundle, subscription, or service?
- Is the displayed price the normal price or a temporary discount?

A product does not have to match yours exactly, but the comparison should be meaningful.

Competitor Comparison

Offer	Customer	Main Outcome	What Is Included	Normal Price	Sale Price	Position
1. _____	_____	_____	_____	_____	_____	Low / Standard / Premium
2. _____	_____	_____	_____	_____	_____	Low / Standard / Premium
3. _____	_____	_____	_____	_____	_____	Low / Standard / Premium
4. _____	_____	_____	_____	_____	_____	Low / Standard / Premium
5. _____	_____	_____	_____	_____	_____	Low / Standard / Premium

Offer	Customer	Main Outcome	What Is Included	Normal Price	Sale Price	Position
6.						Low / Standard / Premium
7.						Low / Standard / Premium
8.						Low / Standard / Premium
9.						Low / Standard / Premium
10.						Low / Standard / Premium

Detailed Comparison

Choose the five most relevant competitors and rate them.

Use:

- 1 = Limited
- 2 = Basic
- 3 = Moderate
- 4 = Strong
- 5 = Extensive

Comparison Factor	Product 1	Product 2	Product 3	Product 4	Product 5	My Product
Clarity of outcome						
Depth of guidance						
Practical tools						
Ease of use						
Design and presentation						
Number of related resources						
Customer support						
Updates included						
Specialisation						
Overall usefulness						

Market Observations

Lowest normal price found:

£/\$ _____

Highest normal price found:

£/\$ _____

Most common price range:

£/\$ _____ to £/\$ _____

The products at the lower end usually include:

The products in the middle usually include:

The products at the higher end usually include:

Common features customers appear to expect:

Features my product offers that some competitors do not:

Features competitors offer that my product does not:

Comparison Conclusion

Based on this research, my product appears to sit:

- ☐ Below the main market range
- ☐ Near the lower end
- ☐ Near the middle

- ☐ Near the upper end
- ☐ Above the current range

The most reasonable market-supported price range is:

£/\$ _____ to £/\$ _____

The competitor I consider most comparable is:

Why is this the most useful comparison?

What should I avoid copying without understanding?

Cost and Profit Worksheet

Purpose

Use this worksheet to understand what it costs to create, sell, deliver, and maintain your product.

Some expenses occur once. Others repeat monthly, annually, or with every sale. Separating them helps you understand how much profit the product may actually generate.

Part A: One-Time Creation Costs

Record expenses incurred while creating the product.

One-Time Cost	Amount
Research	£/\$ _____
Writing or content creation	£/\$ _____
Editing	£/\$ _____
Proofreading	£/\$ _____
Graphic design	£/\$ _____
Cover or product images	£/\$ _____
Templates or licensed assets	£/\$ _____
Spreadsheet development	£/\$ _____
Technical setup	£/\$ _____
Legal or professional advice	£/\$ _____
Other: _____	£/\$ _____
Other: _____	£/\$ _____

Total one-time creation costs:

£/\$ _____

Part B: Your Own Time

You may not pay yourself a wage while creating the first version, but recording your time helps you understand the real work involved.

Activity	Hours Estimated	Hourly Value	Total
Research	_____	£/\$ _____	£/\$ _____
Planning	_____	£/\$ _____	£/\$ _____
Writing or building	_____	£/\$ _____	£/\$ _____
Editing	_____	£/\$ _____	£/\$ _____
Formatting	_____	£/\$ _____	£/\$ _____
Testing	_____	£/\$ _____	£/\$ _____
Sales page preparation	_____	£/\$ _____	£/\$ _____
Other: _____	_____	£/\$ _____	£/\$ _____

Total hours:

Estimated value of your time:

£/\$ _____

You do not have to recover the full value of your time immediately. This figure is included to prevent you from treating your work as though it had no cost at all.

Part C: Ongoing Business Costs

Ongoing Cost	Monthly Amount	Annual Amount
Website hosting	£/\$ _____	£/\$ _____
Domain	£/\$ _____	£/\$ _____
Email marketing	£/\$ _____	£/\$ _____
Selling platform	£/\$ _____	£/\$ _____
Design software	£/\$ _____	£/\$ _____
File storage	£/\$ _____	£/\$ _____
Bookkeeping or accounting	£/\$ _____	£/\$ _____
Customer support	£/\$ _____	£/\$ _____
Contractors	£/\$ _____	£/\$ _____
Other: _____	£/\$ _____	£/\$ _____

Total monthly operating costs:

£/\$ _____

Total annual operating costs:

£/\$ _____

Part D: Costs Attached to Each Sale

Per-Sale Cost	Percentage or Amount Estimated Cost	
Payment processing	_____ %	£/\$ _____
Platform transaction fee	_____ %	£/\$ _____
Fixed transaction fee	£/\$ _____	£/\$ _____
Affiliate commission	_____ %	£/\$ _____
Tax collected or absorbed	_____ %	£/\$ _____
Customer support allowance	£/\$ _____	£/\$ _____
Refund allowance	_____ %	£/\$ _____
Advertising cost per sale	£/\$ _____	£/\$ _____
Other: _____	£/\$ _____	£/\$ _____

Estimated total cost attached to each sale:

£/\$ _____

Part E: Profit Per Sale

Selling price:

£/\$ _____

Minus estimated per-sale costs:

£/\$ _____

Estimated profit before shared operating costs:

£/\$ _____

Formula

Selling price

– payment and platform fees

– advertising cost

– affiliate commission

– refund allowance

– other variable costs

= estimated contribution from each sale

Part F: Profit Margin

Estimated profit per sale:

£/\$ _____

Selling price:

£/\$ _____

Estimated profit ÷ selling price × 100

Estimated profit margin:

_____ %

Part G: Monthly Profit Estimate

Expected Monthly Sales	Revenue	Per-Sale Costs	Shared Monthly Costs	Estimated Profit
10	£/\$ _____	£/\$ _____	£/\$ _____	£/\$ _____
25	£/\$ _____	£/\$ _____	£/\$ _____	£/\$ _____
50	£/\$ _____	£/\$ _____	£/\$ _____	£/\$ _____
100	£/\$ _____	£/\$ _____	£/\$ _____	£/\$ _____
Other: _____	£/\$ _____	£/\$ _____	£/\$ _____	£/\$ _____

Cost Review

Which cost has the greatest effect on profit?

Are any subscriptions unnecessary at this stage?

Is the product still viable if advertising costs rise?

Does the planned price leave room for discounts or affiliate commissions?

What cost should be reviewed again after the first three months?

Break-Even Calculator

Purpose

Use this calculator to estimate how many units you need to sell before recovering the money invested in the product.

Break-even is the point where the income generated has covered the relevant costs. Sales beyond that point begin contributing more directly to profit.

Part A: Choose What You Want to Recover

Tick the costs you want to include in your break-even calculation.

- ☐ Contractor costs
- ☐ Design costs
- ☐ Editing and proofreading
- ☐ Technical setup
- ☐ Launch advertising
- ☐ Software purchased for the project
- ☐ Your own time
- ☐ First month of operating costs
- ☐ All initial product costs
- ☐ Other: _____

Total fixed costs to recover:

£/\$ _____

Part B: Contribution Per Sale

Product selling price:

£/\$ _____

Variable costs attached to each sale:

£/\$ _____

Selling price – variable cost per sale

Contribution per sale:

£/\$ _____

The contribution per sale is the amount available to recover fixed costs and later contribute to profit.

Part C: Break-Even Sales

Fixed costs ÷ contribution per sale

£/\$ _____ ÷ £/\$ _____

Break-even number of sales:

_____ sales

Round the result up to the next whole sale.

For example, if the result is 42.3, you will need 43 sales to reach break-even.

Part D: Break-Even Revenue

Break-even number of sales × product price

_____ × £/\$ _____

Break-even revenue:

£/\$ _____

Part E: Time to Break Even

Average Sales Per Month Months to Break Even

5	_____
10	_____
20	_____

Average Sales Per Month Months to Break Even

30	_____
50	_____
Other: _____	_____

Formula

Break-even sales ÷ average monthly sales
= estimated months to break even

Part F: Test Different Prices

Selling Price Per-Sale Costs Contribution Per Sale Break-Even Sales

£/\$ _____	£/\$ _____	£/\$ _____	_____
£/\$ _____	£/\$ _____	£/\$ _____	_____
£/\$ _____	£/\$ _____	£/\$ _____	_____
£/\$ _____	£/\$ _____	£/\$ _____	_____

Break-Even Reflection

Does the required number of sales feel realistic for my current audience?

How many website visitors or subscribers might I need to produce those sales?

Would a lower price make break-even easier or harder once all costs are considered?

Would a higher price still feel reasonable to the intended customer?

What could reduce the number of sales needed to break even?

Discount Impact Calculator

Purpose

Use this tool before offering a discount.

A discount reduces the amount earned from every sale. To produce the same revenue or profit, you may need to sell considerably more units. This calculator helps you see that effect before making a decision.

Part A: Current Price

Normal selling price:

£/\$ _____

Per-sale costs at the normal price:

£/\$ _____

Profit or contribution per sale at the normal price:

£/\$ _____

Part B: Proposed Discount

Discount percentage:

_____ %

Discount Amount

Normal price $\times$ discount percentage

£/\$ _____ $\times$ _____ %

Discount amount:

£/\$ _____

Discounted Price

Normal price – discount amount

£/\$ _____ – £/\$ _____

Discounted selling price:

£/\$ _____

Part C: Profit at the Discounted Price

Discounted price:

£/\$ _____

Estimated costs attached to each discounted sale:

£/\$ _____

Profit or contribution per discounted sale:

£/\$ _____

Part D: Sales Needed to Match Normal Revenue

Choose a normal sales target.

Normal number of sales:

Normal price:

£/\$ _____

Normal sales × normal price

Normal revenue target:

£/\$ _____

Normal revenue target ÷ discounted price

Discounted sales needed to match revenue:

_____ sales

Additional sales required:

_____ sales

Part E: Sales Needed to Match Normal Profit

Normal sales $\times$ normal profit per sale

Normal profit target:

£/\$ _____

Normal profit target $\div$ discounted profit per sale

Discounted sales needed to match profit:

_____ sales

Additional sales required to protect profit:

_____ sales

Discount Comparison Table

Discount	New Price	Profit Per Sale	Sales Needed to Match Normal Profit
0%	£/\$ _____	£/\$ _____	_____
10%	£/\$ _____	£/\$ _____	_____
15%	£/\$ _____	£/\$ _____	_____
20%	£/\$ _____	£/\$ _____	_____
25%	£/\$ _____	£/\$ _____	_____
30%	£/\$ _____	£/\$ _____	_____
Other: _____%	£/\$ _____	£/\$ _____	_____

Discount Decision

Why am I considering this discount?

- ☐ Product launch
- ☐ Limited seasonal promotion

- ☐ Reward for existing customers
- ☐ Bundle incentive
- ☐ Subscriber offer
- ☐ Testing demand
- ☐ Slow sales
- ☐ Anxiety about the normal price
- ☐ Other: _____

Start date:

End date:

What should the discount help the business achieve?

How will I judge whether it worked?

Will customers understand that the normal price is genuine?

- ☐ Yes
- ☐ No
- ☐ Unsure

Final decision:

- ☐ Offer the discount
- ☐ Use a smaller discount
- ☐ Add a bonus instead
- ☐ Improve the product page first
- ☐ Keep the normal price

Reason:

Monthly Revenue and Expense Tracker

Purpose

Many small business owners only record sales. This worksheet helps you understand what the business actually earns after expenses.

Month

Revenue

Income Source	Amount
---------------	--------

Product 1	
-----------	--

Product 2	
-----------	--

Product 3	
-----------	--

Affiliate Income	
------------------	--

Other	
-------	--

Total Revenue

£_____

Expenses

Expense	Amount
---------	--------

Platform Fees	
---------------	--

Payment Processing	
--------------------	--

Advertising	
-------------	--

Email Software	
----------------	--

Website Hosting	
-----------------	--

Domain	
--------	--

Contractors	
-------------	--

Expense	Amount
Design	
Software	
Other	

Total Expenses

£ _____

Monthly Profit

Total Revenue

£ _____

Minus Expenses

£ _____

Estimated Profit

£ _____

Observations

What went well this month?

Biggest expense

Could any costs be reduced?

Sales and Conversion Dashboard

Purpose

Track the numbers that help explain how your business is performing. The goal is not to monitor everything—only what helps you make better decisions.

Month

Website Activity

Sales Page Visitors

Email Subscribers Added

Product Page Clicks

Sales

Products Sold

Revenue

£_____

Refunds

Average Selling Price

£ _____

Conversion

Sales Page Visitors

Sales

Estimated Conversion Rate

_____ %

Promotion Activity

Tick what you completed.

- ☐ Weekly Email
- ☐ Product Promotion
- ☐ Blog Post
- ☐ Pinterest Pins
- ☐ Social Posts
- ☐ Collaboration
- ☐ Paid Advertising
- ☐ Guest Content

Best Performing Activity

What Should Improve Next Month?
