LoftyBiz Paid Pilot Agreement

Charge for the pilot, agree on three success measures and a decision date up front, and put the decision meeting in both calendars on day one.

From LoftyBiz 139 — Selling to Bigger Companies: Pilots, More Contacts and Deal Momentum. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

This week's task

Take your largest open deal. Write down every person who has a say in it, and circle the ones you haven't met. Check whether a next meeting is booked. If it's a free trial, draft a one-page paid pilot with a price, three success measures and a decision date. Put that page into Systex, so the routine is waiting for the next deal.

The parties and the pilot

Field	Your notes
Customer / company	
Our company and owner	
Pilot start date	
Pilot end date (fixed)	
Pilot price (example from the video, not a promise: $6,000 for 8 weeks)	
What “first value” looks like, and by when (example: drivers saw better routes within 10 days)	

Three success measures, chosen together

#	Success measure	How we will measure it	Starting point	Result at the end date
1	Example only: fewer miles driven per route			
2	Example only: more stops per driver per day			
3	Example only: fewer late deliveries			
	Your measure 1 (replace the examples)			
	Your measure 2			
	Your measure 3			

Decision meeting

Field	Your notes
Decision meeting date (booked in both calendars on day one)	
People who will sign, and who else has a say	
Next meeting after each call (never leave without the next one booked)	

Pipeline audit (before you add more leads)

Check	What to write down	Where it stands now
Volume	How many deals are in each stage	
Value	Their average size	
Velocity	How long deals sit in each stage (example: trial sat for 4 months)	
Conversion	What share moves to the next stage (example: only 1 in 5 moved on)	

The weakest stage	The one stage you will fix first	

A caution from the video: a paid pilot only works if you can deliver within the time you agreed. Promise a small, clear result, not everything at once.

In the video example (not a promise), a distributor signed a yearly contract worth about $54,000 after the pilot, and the average trial stage dropped from about 4 months to about 9 weeks.

Example figures. General education, not financial, legal, HR or tax advice. Results vary. These are examples, not promises.