

The AI pricing pivot: Why SaaS must transform again

Maximise the success of your agentic AI solutions with smart pricing and packaging strategies. This practical guide explores how monetisation and pricing transparency impact customer engagement, trust, adoption, and lifetime value. It also introduces the **COMPASS Framework**: a practical tool for identifying the right pricing model at any stage of your journey.



Fair pricing pays.

In the race to commercialize AI, how you charge for intelligence can be as critical as how you build it. For software companies delivering AI agent solutions, success isn't just about the technology. How you package and price your AI has become a critical factor that can make—or break—your business.

What is agentic AI?

Agentic AI is the next step in the evolution of generative AI.

- **Generative AI:** Creates new content (e.g. text, code, imagery, or summarising data).
- **Agentic AI:** Acts on behalf of the user—executing multi-step processes, making decisions, and delivering results autonomously.

Generative AI is an enabler. Agentic AI goes further, shifting from assisting humans to acting on their behalf.



Monetisation, and pricing transparency drive engagement, trust and adoption—and ultimately unlock lifetime value. SaaS pricing models must be reinvented. In a world of rapidly evolving capabilities, multi-step automation, and autonomous agents, old “cost per seat” formulas no longer reflect the value created or the costs incurred. Missteps in pricing or packaging risk slowing adoption and limiting revenue potential.

This guide shows how a strategic approach to pricing and packaging can unlock the full potential of AI agents. Drawing on insights from Zuora, Simon-Kucher, and AWS, it provides a framework to select the right pricing model at any stage—helping companies maximise adoption, revenue, and long-term customer relationships while adapting quickly to change.

Realising the agentic AI opportunity.

Agentic AI is moving rapidly from concept to commercial reality. For software companies, it represents a new wave of technical innovation and a profound business opportunity.

According to Forrester, the primary drivers motivating adoption of generative AI include:¹

Improving risk management 47%

Leveraging insights for decision-making 44%

Fostering innovation 42%

And enhancing business strategy 41%

Yet only a smaller subset of software companies has deployed full agentic AI solutions—AI agents that execute tasks autonomously to achieve outcomes—highlighting a new frontier for monetisation.

Bringing agentic AI to market is rarely limited by technology. As Kilian Ruess, Senior Solutions Architect and SaaS advisor at AWS, explains: “The technology is rarely the barrier. The real challenge for software companies is figuring out how to bring AI agents to market in ways that make commercial sense.”

SaaS growth models relied on tiered plans, seat-based pricing, or feature bundles, underpinned by predictable economics and minimal marginal costs.

¹Forrester, A Roadmap to Driving Enterprise Value in an Agentic Future, 2025.

Agentic AI disrupts this foundation.

Costs are now consumption-based, driven by variable usage patterns, model inference, and ongoing training. They are less predictable and often higher than in traditional SaaS.

Value creation has also changed. AI agents deliver outcomes autonomously, independent of human users. A “per seat” metric cannot capture the agent’s value, sophistication, or breadth of work.

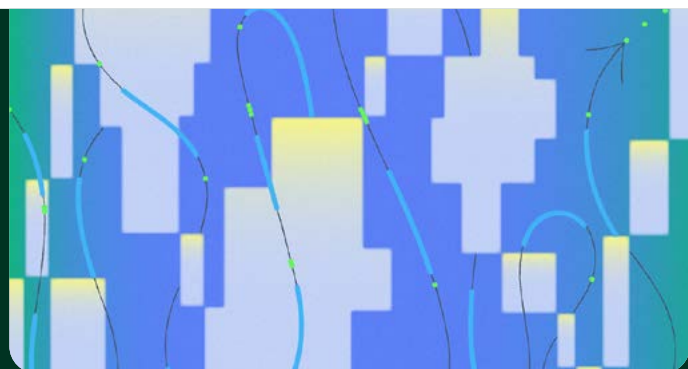
The key pressure point for leadership teams is how to design pricing and packaging strategies that drive adoption, ensure predictability, and capture value effectively.

As Ruess adds: “The pricing metric is the first thing people think about because it’s the most obvious change. But it’s only one part of a good pricing strategy.”

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SaaS is not dead, but the way you create value with AI is very different.”

Kilian Ruess, AWS, Senior Solutions Architect and SaaS Advisor





How AWS accelerates agentic AI adoption

AWS provides software companies with the tools to move from concept to commercialisation, bridging the gap between technology and go-to-market execution. Innovations such as Amazon Bedrock AgentCore, Amazon Bedrock Guardrails, and Amazon Nova foundation models give developers a secure, scalable foundation for building and deploying AI agents.

By reducing technical barriers, AWS enables software companies to focus on what to charge for and how to package AI agents, rather than being slowed down by infrastructure challenges.

These tools allow teams to:

- **Deploy AI agents** that operate autonomously across multi-step workflows.
- **Experiment** with different consumption patterns, usage metrics, and pricing models without risking performance or security
- **Maintain trust and governance** while expanding the sophistication and autonomy of their AI agents.

In short, AWS empowers software companies to accelerate adoption, monetisation, and value delivery—providing the foundation for successful pricing and packaging strategies in the age of agentic AI.

The new script of pricing and packaging.

For decades, SaaS growth followed a familiar script: structure offerings into tiers, bundle features incrementally, and set prices based on the number of users or company size.

This worked because costs were predictable, marginal, and value was tied to seats or basic usage.

Agentic AI changes the equation.

The cost structure is now variable and consumption-based: model inference, data acquisition, and training scale with actual AI agent usage. At the same time, value is created autonomously—agents drive outcomes independently of human users, making seat-based metrics misaligned with business impact. Michael Mansard, Zuora, Principal Director of Subscription Strategy, observes: “78% of companies are already pricing beyond just users, reflecting the shift toward consumption- and value-based metrics.”

SaaS bundling—ordinarily tiered plans or feature gating—no longer captures the complexity of AI agents.

Modern pricing must account for:

- **Consumption-based metrics**—pricing per workflow, task, or agent step.
- **Outcome alignment**—linking the price metric to tangible value delivered, without assuming full outcome-based models (which remain rare in practice).
- **Risk mitigation**—credit-based pricing or fair-use policies to balance adoption and predictability.

As Alix Nepveux, Partner at Simon-Kucher, emphasises: “With AI agents, you start with the pricing metric, then design packaging to support it. Misalignment between the two can suppress adoption or revenue potential.”

In this new paradigm, packaging is no longer just a way to differentiate features. It must reflect agent sophistication, autonomy, and trust. Done correctly, it accelerates adoption and monetisation; done poorly, it creates friction and confusion.

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Zuora, Principal Director
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Pricing is not just about monetisation... it's an interdependent triangle. You need to balance cost-plus, value-based, and adoption considerations. Miss one, and the whole strategy fails.”

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Nailing the metric: Introducing COMPASS

The hardest question for any software company building AI agents isn't what to charge—it's what to charge for.

Choosing the right pricing metric goes beyond monetisation: it shapes the product roadmap, sales messaging, compensation models, and revenue recognition. Get it right, and the organisation aligns around delivering and capturing value. Get it wrong, and both adoption and monetisation suffer.

Traditional per-seat pricing no longer reflects the autonomous value AI agents create. The COMPASS Framework provides a structured approach to navigate these complex choices.

By mapping pricing models against the right dimensions, companies can select metrics that balance adoption, value, and sustainability—without being locked into outdated formulas. As Michael Mansard explains: “Pricing is not just about monetisation... it's an interdependent triangle. You need to balance cost-plus, value-based, and adoption considerations. Miss one, and the whole strategy fails.”

The COMPASS Framework equips software companies with both compass and map: it identifies the right pricing metric for their stage of maturity, while providing tools to adjust as adoption, usage, and value evolve.

What is COMPASS?

COMPASS stands for Choice of Optimal Metrics for Pricing Agentic Systems and Solutions, and was developed by Michael Mansard at Zuora to make AI agent monetisation practical and repeatable.

COMPASS helps companies to:

- **Identify** which metrics best reflect value creation.
- **Balance** cost-plus, value-based, and adoption considerations.
- **Adapt** pricing models as AI solutions evolve.

It is both a framework and a toolkit—enabling leaders to navigate one of the most complex strategic challenges of the AI era.

A deep dive into COMPASS

COMPASS evaluates two core dimensions that determine which metrics are suitable:



Scope of Work

what the AI agent autonomously completes: tasks, workflows, or decisions. Linking scope to pricing ensures alignment with the actual work delivered.



Attributability

how clearly the value created by the AI can be measured and claimed. Pricing metrics must reflect this impact reliably.

For a deeper dive into the COMPASS methodology, see Michael Mansard's original LinkedIn articles:

[“Agentic AI Monetization || COMPASS Part 1”](#)
and [“Agentic AI Monetization || COMPASS Part 2”](#)

These articles explore the full research behind the framework and the practical tools used by software companies to price and package AI agents effectively.

To guide decisions, COMPASS comes with three practical tools:



Value Spectrum

Maps AI agents from simple task automation to multi-step strategic decision-making, highlighting where value is most visible to customers.



3x3 Matrix

Overlays Scope of Work against Attributability, helping teams determine whether an agent should be priced per task, workflow, step, or outcome.



Pricing Lever Checklist

14 key questions examining adoption, monetisation, and operational constraints before finalising a model reflect this impact reliably.

Most companies will find themselves somewhere along the spectrum between per-user and full outcome-based models—which is exactly why COMPASS exists.

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True outcome-based metrics are still rare, used by less than ~10% of generative AI and AI agent offers studied.”

Michael Mansard,
Zuora, Principal Director
of Subscription Strategy



Change is the only constant: Iterating pricing in agentic AI

For software companies delivering agentic AI, pricing can never be set in stone.

Unlike SaaS models, usage is dynamic, evolving, and unpredictable. Success depends on the ability to continuously monitor, evaluate, and adjust pricing in response to real-world behaviour.

As Michael Mansard puts it:
“Outcome-based pricing is not the holy grail. You have to know the spectrum, use the tools, and continuously iterate with your clients. It’s never going to be set in stone.”

Iteration requires both data and dialogue:

- **Critical telemetry**—tracking how customers consume AI solutions.
- **Proactive alerts**—spotting when thresholds are reached or patterns shift.
- **Customer collaboration**—maintaining open discussions about value and usage.
- **Rapid learning loops**—treating pricing as a live experiment.

As Mansard adds:
“Usage patterns and outcomes evolve constantly, so it’s not enough to set pricing once. You need to iterate continuously—and the speed at which you can do that is critical.”

Alix Nepveux reinforces the point:
“Pricing for agentic AI isn’t static – it’s a continuous conversation with your customers.”



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Simon-Kucher, Partner

Rethinking Packaging

If pricing defines how value is measured and monetised, packaging determines how that value is delivered and perceived. In SaaS, packaging usually meant feature gating, seat tiers, and usage caps to create upsell paths. With agentic AI, this logic no longer holds.

As Alix Nepveux from Simon-Kucher explains, packaging must now adapt to reflect systems of engagement (levels of autonomy), sophistication (performance, domain expertise, creativity), plus trust and governance (safety, security, transparency). These dimensions give customers a clear sense of what an AI agent can and cannot do—and why one package costs more than another.

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Customers don't want to feel like they're paying twice for AI: once in their subscription, and again through add-ons they don't understand. Packaging must feel intuitive, transparent, and value-aligned.”

Alix Nepveux,
Simon-Kucher, Partner

The goal isn't to abandon packaging fundamentals, but to prevent them from getting in the way of monetisation. For example, limiting an agent's efficiency in an outcome-based model by fencing features risks confusing customers and stalling adoption.

Instead, packaging should enable customers to explore higher levels of autonomy, experiment with advanced capabilities, and scale usage with confidence.

Done well, packaging becomes a growth engine. Done poorly, it creates friction, mistrust, and stalled adoption.

Who is packaging really for?

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Packaging has to be designed for customer clarity first. If they can't see the value, they won't buy, no matter how clever the pricing model is.”

Alix Nepveux,
Simon-Kucher, Partner

It's tempting to see packaging as an internal lever for upselling or segmentation. But with agentic AI, packaging must start from the customer's perspective.

Clear, intuitive packaging reduces friction, builds trust, and encourages adoption. When customers understand what's included, what's extra, and why it matters, they are more likely to experiment and scale usage.

Pricing and packaging first, GTM next

In SaaS, go-to-market often led the way, with pricing and packaging as afterthoughts. With agentic AI, that sequence is reversed.

As Michael Mansard notes:

“Pricing and packaging aren’t just commercial decisions. They set the rhythm for your sales teams, the story for your marketing, and even the motivation for your partners.”

By defining clear metrics, fair models, and customer-centric packages upfront, software companies enable sales to articulate value, marketing to campaign around outcomes, and partners to align incentives.

A pricing model that feels unpredictable or disconnected from value delivered undermines adoption and trust. Conversely, a thoughtful approach reinforces fairness and strengthens relationships.

The lesson is clear: in agentic AI, pricing and packaging don’t follow your GTM strategy.

They are your GTM strategy.

Unlocking the agentic AI opportunity

Agentic AI represents one of the most significant shifts in software since the rise of SaaS. For software companies, the potential is enormous—but so are the risks.

As Michael Mansard puts it:

“Pricing and packaging aren’t just commercial levers—they’re what determine whether agentic AI scales or stalls.”

The difference between rapid adoption and stalled pilots, between lifetime value and churn, comes down to how solutions are priced, packaged, and presented.

With insights from Simon-Kucher and Zuora, and guided by AWS’s customer-first principles, this whitepaper has outlined a practical path forward:

- **Ground strategy** in transparent, fair pricing.
- **Use COMPASS to identify the right metrics** at the right time.
- **Iterate continuously**, guided by data and customer dialogue.
- **Treat pricing and packaging as the foundation** of GTM strategy.

Fair, strategic pricing and packaging aren’t just commercial levers. In the age of agentic AI, no surprises isn’t just a customer promise—it’s the strategy that builds trust, adoption, and growth.

To learn more, visit zuora.com/resources or explore our latest insights on AI monetization.



Final thoughts: Key takeaways

Agentic AI is redefining the software business model, and fair, flexible pricing is the key to building both trust and long-term value. The organisations that succeed will be those that align technical capability with commercial clarity.

1. Fair pricing builds trust and drives adoption.

Transparent, customer-centric pricing isn't just ethical; it's a growth strategy. Companies that eliminate surprises create stronger, longer-lasting relationships.

2. Metrics matter more than ever.

The right pricing metric defines how value is perceived, measured, and captured. Frameworks such as COMPASS help ensure metrics evolve with maturity, balancing adoption, monetisation, and predictability.

3. Iterate relentlessly.

Agentic AI pricing can't be static. Real-time telemetry, customer dialogue, and regular pricing reviews turn iteration into a competitive advantage.

4. Packaging is the bridge between value and understanding.

Clarity in packaging drives confidence and adoption. Customers should always know what they're paying for, and why it matters.

5. Partnerships unlock scale.

AWS's consumption-based infrastructure, Zuora's dynamic billing capabilities, and Simon-Kucher's pricing expertise together form a foundation for sustainable growth in the agentic AI era.

About Zuora

Zuora is a leading monetization platform, helping companies design and scale subscription and consumption-based pricing models.

By managing the full revenue lifecycle—from billing to compliance—Zuora enables Software companies to adapt pricing quickly while keeping finance operations running smoothly.

About Simon-Kucher

Simon-Kucher is a leading global consultancy specialising in growth, pricing, and go-to-market strategies.

With decades of experience advising SaaS and technology companies, their perspective on AI monetisation reflects both market-wide research and direct client experience.

The company helps software firms navigate the shift from SaaS metrics to agentic AI pricing, offering frameworks and examples for aligning pricing with value delivered, consumption patterns, and risk mitigation.

About AWS

Amazon Web Services is the world's most comprehensive and broadly adopted cloud, enabling customers to build anything they can imagine.

It offers the greatest choice of innovative cloud capabilities and expertise, on the most extensive global infrastructure with industry-leading security, reliability, and performance.

The power of partnership: AWS, Zuora, and Simon-Kucher

Bringing agentic AI to market demands alignment across infrastructure, monetisation, and pricing strategy. AWS, Zuora, and Simon-Kucher together offer that complete foundation.

AWS provides the scalable, consumption-based infrastructure that makes it possible to build, deploy, and operate AI agents efficiently.

Zuora enables flexible, usage-based billing and subscription management—turning complex AI consumption patterns into predictable revenue streams.

Simon-Kucher brings deep expertise in pricing strategy, helping software companies define metrics, packaging, and positioning that reflect the true value of agentic AI.

Combined, these strengths allow software companies to commercialise agentic AI with confidence—from technical execution to market success. Together, they form an ecosystem where fair pricing, operational agility, and customer trust naturally reinforce each other.

