Fieldguide

AI and the Pricing Transition

Why the commercial model is lagging the operational one, and what the data actually shows

Ask any firm leader whether AI changes their pricing model and you will get an immediate yes. Ask them what that change looks like in practice, and the conversation usually stalls. This is the one area in our research where the data does not show a clean deployer advantage, and that is exactly why it deserves its own conversation.

The operational transformation is running well ahead of the commercial one. The firms that have rebuilt their workflows around AI have not, on balance, rebuilt how they charge for the results. That gap is not a failure of will. It is the nature of pricing: it is the last thing firms change, because it touches clients directly and the consequences of getting it wrong are immediate. The firms that have gone deepest with AI have not gone proportionally further on pricing. The awareness is there. The execution is lagging.

The Key Finding

Among active deployers, **39.2%** include value-based or outcome pricing in their current model mix. Among early adopters, **23.5%** say the same. That gap is real and meaningful. But here is the number that reframes it:

Among the Leaders, the firms at the deepest two levels of AI deployment where workflows have been fully rebuilt around AI, value-based pricing sits at **38.1%**. Essentially unchanged from the broader deployer group. Depth of AI deployment, on its own, is not moving the pricing needle. Firms that have gone all the way in on operational transformation have not done the same commercially.

Pricing models in use, by segment (multi-select; percentages reflect share of firms using each model)

Pricing model	Leaders (n=84)	Active Deployers (n=204)	Early Adopters (n=196)	All Firms (n=400)
Fixed fee	52.4%	**56.4%**	37.8%	47.2%
Subscription / Retainer	50.0%	**44.6%**	30.6%	37.8%
Value-based / Outcome	38.1%	**39.2%**	23.5%	31.5%
Hourly	41.7%	**31.4%**	32.1%	31.8%
Tiered Pricing	28.6%	**27.5%**	22.4%	25.0%
Still evaluating	7.1%	**6.9%**	17.9%	12.2%

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Average Number of Pricing Models in Active Use

2.11	1.99	1.46
Average Pricing Models **Leaders**	Average Pricing Models **Active Deployers**	Average Pricing Models **Early Adopters**

What this Means

Three things stand out in this data. First, the transition is not a swap. Hourly billing rates are nearly identical across all groups. Deployers are not abandoning time-based billing; they are diversifying around it. Leaders average 2.11 pricing models in their current mix; early adopters average 1.46. The movement is additive, not replacement.

Second, deployers have mostly stopped waiting. Only 7% of active deployers say they are still evaluating their pricing approach, compared to 18% of early adopters. The question of whether to change is settled for most deployers. The question of how is still being worked out.

Third, the biggest prize is still uncaptured. Fixed fee and subscription models have moved meaningfully among deployers, and those are important steps. But the model most aligned with the value AI enabled delivery actually creates, outcome and value-based pricing, remains at about 40% even for the firms that have gone furthest. Firms that crack this will have a durable commercial advantage that efficiency gains alone cannot deliver.