

Trim and Stack

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Trim and Stack Key takeaways

- Trimming and stacking is a process to maximize profit and perceived value: remove low-value, low-margin elements (trim) and combine high-value, high-margin elements (stack).
- Start with a handful of high-value clients, give lots of value, price position high, then learn how to deliver more scalably.
- The objective is to provide similar perceived value with less operational drag by creatively combining and simplifying deliverables.
- Many founders make the mistake of prioritizing scalability before they have customers; instead, get revenue and proof first, then trim and stack to scale.
- Trimming and stacking supports moving down the price pyramid while maintaining easier sales because of prior positioning.

Checklist

1. List every potential solution and deliverable
 - Inventory all services, modules, touchpoints, and resources you could provide.
 - Why: You need a full view to decide what to remove or combine for margin and value.
2. Trim low-value / low-margin items
 - Remove or de-prioritize deliverables that add operational cost but little perceived value.
 - Why: This increases profit and reduces fulfillment complexity.
3. Identify high-value, high-margin components to stack
 - Select the few elements that create the most perceived transformation and are repeatable.
 - Why: Stacking these creates an offering that feels valuable to the buyer while improving margins.
4. Build an initial high-touch offer for fewer clients
 - Deliver maximum value to a small number of clients at a premium price.
 - Why: Solves problems deeply, generates cash flow, and creates testimonials/evidence for scaling.
5. Learn from initial clients to optimize delivery
 - Capture feedback and observe what actually drives outcomes vs. what's operationally heavy.
 - Why: Informs which elements to keep, trim, or systematize when scaling.

6. Create a scaled version with lower operational drag

- Convert stacked high-value components into more deliverable formats (processes, templates, less one-on-one).
- Why: Maintains perceived value but makes fulfillment easier and more profitable.

7. Price-position the scalable offer using the premium version

Notes:

- Don't worry about scalability first; prioritize creating flow and demonstrating results, then trim and stack to improve profit and fulfillability.