



How to Enhance Lead-to-Close with Custom Pricing in D365 Sales

- Presented by the Customer Relationship Management Practice





Housekeeping

- Please silence your phones. If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please use this QR code to take the session survey before heading to the next session.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included Surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit
Password: journeyteam!



**58% of salespeople
and their managers
will cut price if the
customer requests
it.***





Presenters



NEVIN ANDERSON
PRINCIPAL SOLUTION ARCHITECT



Overview

- **What is Dynamics 365 Sales?**

- **Dynamics 365 Sales** empowers salespeople to build strong relationships with customers, make informed decisions, and close deals faster.
- It provides tools to manage accounts, track contacts, nurture leads, and create sales collateral.

- **Key Features:**

- **Lead Management:** From lead to order, Dynamics 365 Sales helps you track and manage leads effectively.
- **Custom Pricing:** Customize pricing for products using the **CalculatePrice** message and custom plug-ins.
- **Opportunity Close Form Customization:** Streamline the closing process by pre-populating values from opportunities.

- **Benefits:**

- **Data-Driven Insights:** Understand customer behavior and preferences.
- **Collaboration Tools:** Use AI-driven conversation intelligence and opportunity scoring.
- **Leader in Sales Force Automation: Dynamics 365 Sales is a market leader in sales applications¹.**

- **Real Results:**

- Organizations have seen improved conversion rates and sales productivity.
- Features like intent information and valuable insights have transformed their sales processes¹.

Pricing Is Hard

- Entering a wrong price is easy.
- Discounting price to win the sale is perversely incentivized.
- Result: Most sales organizations put strong measures in place to control their sales price.



Pricing Requirements

The standard OOB pricing and discounting methods in dynamics 365 sales can support a wide variety of pricing needs. Perhaps even yours.

- Tiered pricing
- Volume discounts
- Contract pricing
- Special promotions
- Special pricing approval



OOTB Options

- **Price lists:** Per Customer type, region, or other criteria
- **Discounts:** Quantity purchased, customer segments, or promotional periods
- **Custom entities and fields:** For requirement-specific pricing calculations
- **Integration with other dynamics 365 modules:** Integrate with Business Central, Finance and Operations, Retail, etc.
- **Workflow automation:** Automate pricing approval processes, discount calculations, and pricing adjustments
- **Third-party extensions and integrations:** Configure Price Quote modules.

Price Lists

2024 - Saved
Price List · Price Level

Active Status

- General
- Role prices
- Role price markups
- Category prices
- Price List Items
- Territory Relationships
- Price List Items
- Related

Name * **2024**

Context * **Sales**

Start Date 1/1/2022

End Date 12/31/2024

Currency * **US Dollar**

Time Unit **Hour**

Description

2024 - Saved
Price List · Price Level

Active Status

- General
- Role prices
- Role price markups
- Category prices
- Price List Items**
- Territory Relationships
- Price List Items
- Related

New Price List Item

Update Prices

Unit

Primary Unit

1 - 1 of 1

Page 1

Update Prices

Update prices for all Catalog Item prices by applying a % increase or decrease

Price change [%] * **0.00**

Apply Cancel



Price List Items



CM-BL-BEC-1000 - Saved

Price List Item · Product Price List ▾

General Pricing information Related ▾

Price List	* 2022 Consulting Prices	Currency	US Dollar
Product	* CM-BL-BEC-1000	Discount List	Discount List 1
Unit	* Primary Unit	Quantity Selling Option	Whole ▾ No Control Whole Whole and Fractional



Price List Items - Cont.

General Pricing information Related ▾

Pricing

Pricing Method * **Percent Markup - Standard Cost**

Amount **\$500.99**

Percentage * **10.00**

Rounding

Rounding Policy * **Up**

Rounding Option * **Ends in**

Rounding Amount * **\$0.99**



Price List Items - Cont.

	General	<u>Pricing information</u>	Related ▾
Pricing Method	*		Percent Markup - Standard Cost
Amount	*		Currency Amount Percent of List
Percentage	*		Percent Markup - Current Cost Percent Margin - Current Cost
Rounding			Percent Markup - Standard Cost Percent Margin - Standard Cost
Rounding Policy	*	Up	
Rounding Option	*	Ends in	
Rounding Amount	*	\$0.99	



Discount Lists

Discount List 1 - Saved

Discount List

General Discounts Related ▾

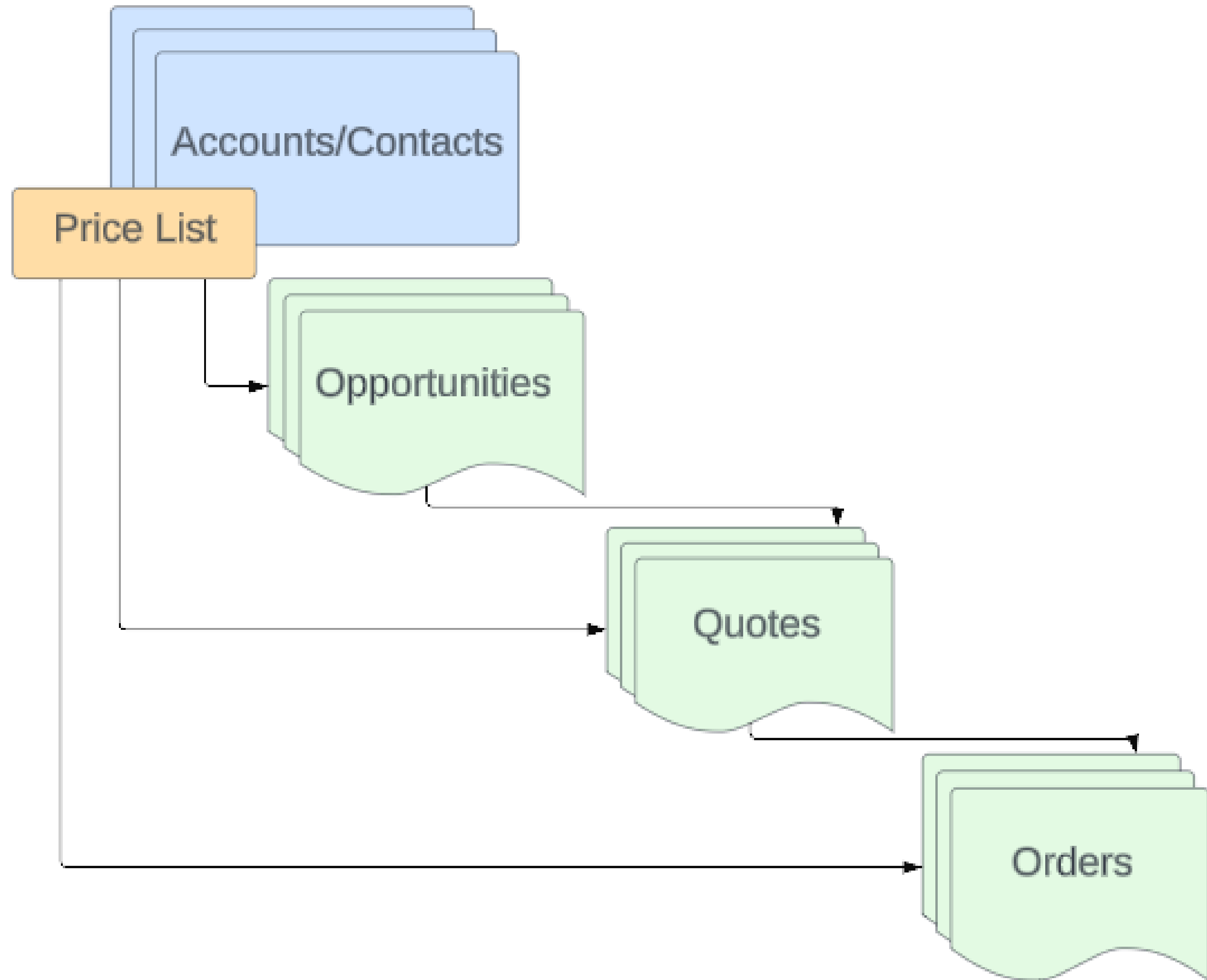
Show Chart + New Discount Refresh Flow ▾ Run Report ▾ Excel Templates ▾ ⋮

Discount Associated View ▾

<input type="radio"/>	Percentage ↑ ▾	Amount ▾	Begin Quantity ▾	End Quantity ▾
	10.00000		10.00000	19.00000
	50.00000		20.00000	100.00000
	60.00000		101.00000	10,000.00000

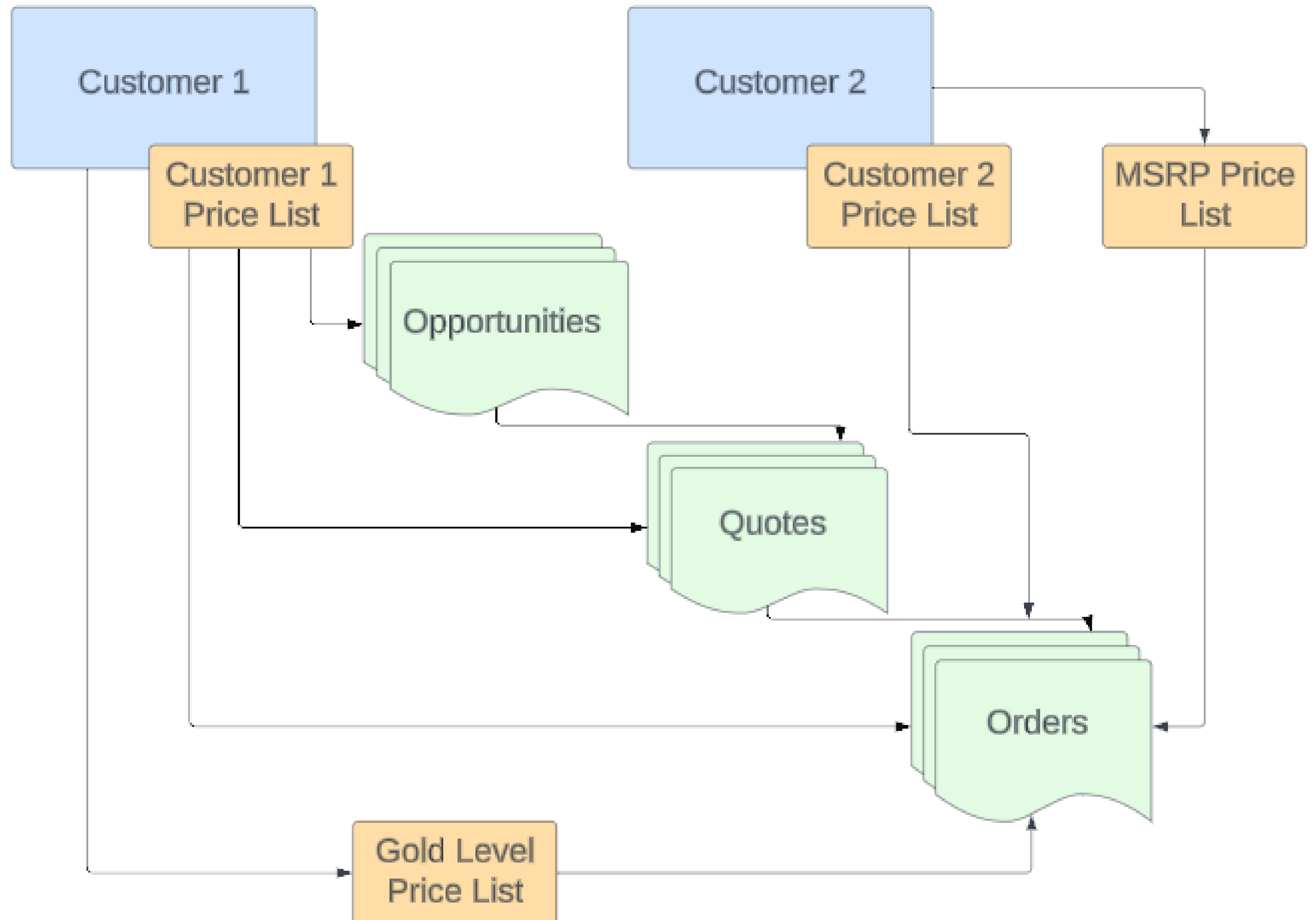


Common Scenario - Default Price List





Common Scenario - Multiple Price Lists





Real-world Examples

- Personalized discounts for VIP customers
- Complex product bundling
- Event-based pricing
- Approval workflows for special discounts
- Dynamic pricing for seasonal products
- Create and maintain price lists and set prices for thousands of products



Unique Scenarios

- Complete custom pricing calculation using custom code
- Discount: If the total amount is greater than 1000 and less than 5000, discount is 5%; if the total amount is 5000 or greater, discount is 10%.
- Tax: Tax is applied on the amount that is effective after the discount is applied (total amount minus discount). If the effective amount is less than 5000, tax is 10%; otherwise, tax is 8%.



Sales Co-Pilot offer

Weekly Coaching Sessions: To help your company be successful in a self-guided implementation with the focus on:

- Following best practices of Sales Copilot to support multiple aspects of the Employee Experience
- Guiding conversations to ensure that each organization is focusing on meeting business objectives and strategic initiatives
- Adoption and change management

Workshops: To give your company guided training and instruction to learn the basics of each Sales Copilot module:

- Engage – Connections – Learning - Topics - Insights – Goals: **\$6,500**



Q & A

We love feedback!
Please complete the session
survey for **an extra giveaway
raffle ticket!**





Thank You!

Let's Connect: Nevin Anderson

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