The Art of Negotiation:

How Insightly CRM Empowers Sales Teams to Close More Deals with Balance and Efficiency

JB SALES

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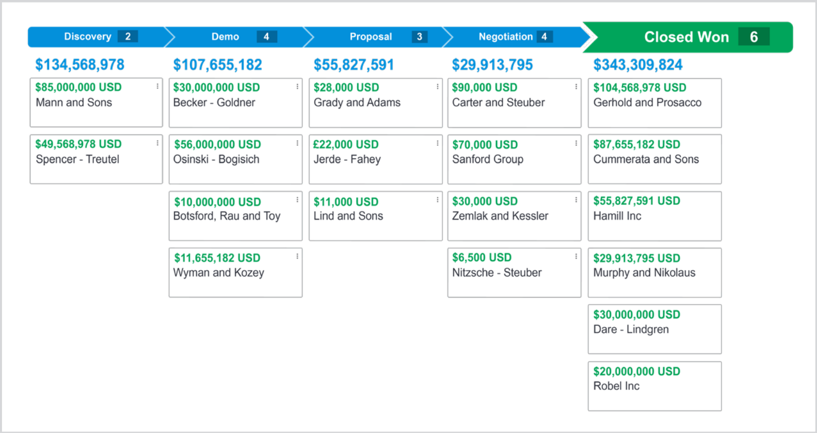
Introduction

A Real Negotiation Requires Reciprocity

Negotiation isn't about winning or losing; it's about making sure both sides leave the table feeling like they've received something valuable. Over the years, I've found that the best negotiations come from a place of equality. You shouldn't have to give away everything to close the deal, and neither should your prospect. Both parties should feel like they're walking away with a fair exchange. The moment one side feels like they've given up too much or not gotten enough in return, that's when deals start to fall apart.

That's where The Art of Negotiation comes in.



THE ART OF NEGOTIATION

Here are the tools and insights you'll walk away with so you can close more balanced deals, more efficiently:

01 **The Principle of Reciprocity**
Learn how to apply the core negotiation strategy where every "give" is immediately followed by a "get" —ensuring that both sides feel equally valued in every negotiation.

02 **Tracking "Gives" and "Gets"**
Understand how to maintain balance in your negotiations by keeping track of what's given and what's asked for in return, whether it's a discount or additional value.

03 **Ensuring Fair and Productive Deals**
Learn why tracking the balance of "gives" and "gets" is crucial to keeping negotiations on track and avoiding lost opportunities.

04 **How Insightly CRM Keeps You Organized**
Discover how Insightly CRM helps you stay on top of every stage in your sales process—from lead management to post-sale follow-up—so you can manage negotiations efficiently and effectively.

Chapter One

Create Your Negotiation Framework: Build in Balance

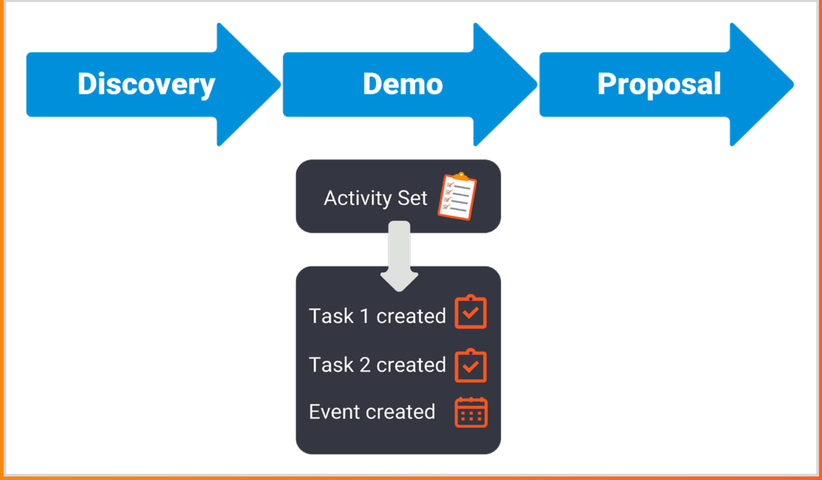
When I approach negotiations, it's never just about what I'm selling—it's about creating a clear framework for both sides to feel equally valued. The key to successful negotiations is always keeping reciprocity at the forefront.

You can't just give away discounts or extra features without first getting something in return. This is why I use a structured approach where every "give" is paired with a "get." It keeps the conversation balanced and ensures that the deal stays healthy.

This framework isn't just a mental checklist; it needs to be tracked, measured, and organized. That's where Insightly CRM's Opportunity Pipeline comes into play. Every stage in the pipeline is a mini-negotiation, from setting up a meeting to proposing terms to finally closing the deal. And every stage requires an exchange. Insightly CRM allows you to track these exchanges efficiently.

USE CASE FOR INSIGHTLY CRM:

Managing Opportunity Stages & Activity Sets



In Insightly CRM, every opportunity has clear stages: Discovery, Demo, Proposal, Negotiation, and so on (and it's super easy to customize your pipeline to fit your exact business needs). Each of these stages represents a step in the negotiation process, and at each step, you should be tracking what's given and what's asked for in return. If you provide a demo, you should immediately commit to the next step, whether it's a pricing discussion or a follow-up meeting with the decision-makers.

The best part about Insightly CRM is the ability to track these actions in real time. For example, if you're offering a special deal or a discount to move a deal forward, Insightly CRM helps you ensure that there's a corresponding action—like a signed contract, an agreement to a specific timeline, or any other action that moves the deal forward.

Chapter Two

Balancing Your Deals: The Scorecard Approach

I always stress the importance of keeping score in a negotiation. When you're giving away perks or discounts, you need to ensure that you're getting something valuable in return. Without a system to track these "gives" and "gets," it's easy to lose sight of the balance and make concessions that hurt you in the long run. That's why I created the Negotiation Scorecard.

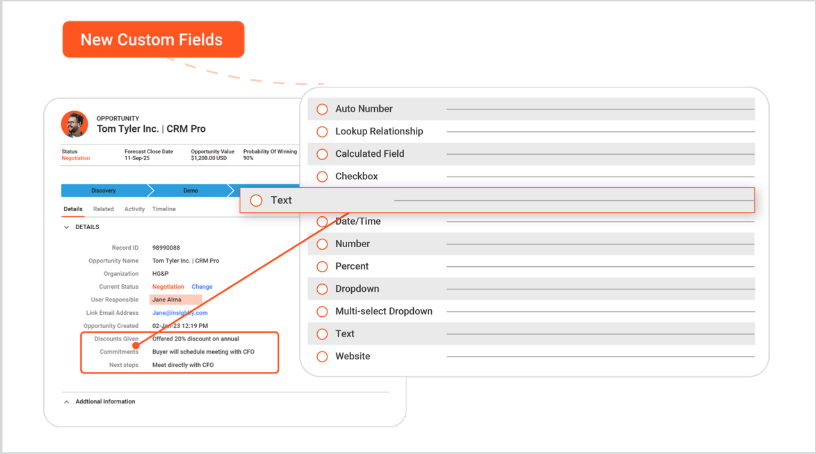
SALES SCORECARD

GIVES					GETS						
Pts		Gave	# of times	Pts (actual)	Pts		Asked and not got yet	Asked and denied	Got	# of times	Pts (actual)
				0							0
				0							0
				0							0
				0							0
				0							0

Scorecarding helps you track what you're giving and what you're getting. You can assign a value to each "give" and each "get," ensuring that the deal is balanced. If you're offering a discount, you need to track what you're getting back—whether it's an agreement to a set timeline, an expanded scope of work, or a firm commitment on the contract terms. Click Here To Download

USE CASE FOR INSIGHTLY CRM:

Custom Fields and Reporting



But keeping track of all this can be challenging unless you have a tool to help you. This is where Insightly CRM's custom fields and reporting capabilities come into play.

In Insightly CRM, you can create custom fields for any information you want to track about each deal. This might include things like discounts given, specific commitments from the customer, or next steps agreed upon. By having these fields in one place, you can easily track the fairness of each negotiation and see whether the "gives" and "gets" align with your negotiation strategy.

With custom fields, you can track every interaction, from the amount of the discount to the next steps you've agreed on in return. Insightly CRM also lets you create detailed reports, so you can get a snapshot of each deal's status and ensure that the negotiation is progressing on track.

Chapter Three

Keeping Your Deals Moving Forward: Task Automation

The key to keeping a negotiation healthy is momentum. The moment you give something, you need to make sure you're asking for something in return, and you need to follow up immediately.

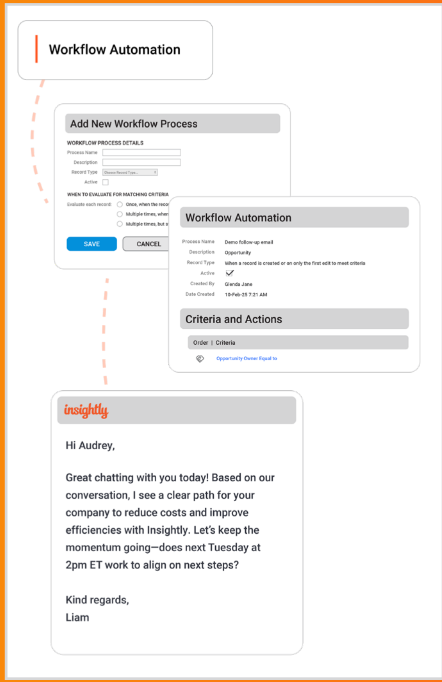
The worst thing you can do is make concessions and then forget to follow up, or worse—let the prospect forget about their commitment.

USE CASE FOR INSIGHTLY CRM:

Workflow Automation

This is where automation comes into play. Insightly CRM's Workflow Automation lets you set up a series of actions that automatically trigger when you hit a specific stage in the pipeline. Whether it's sending a follow-up email after a meeting, scheduling a next step, or reminding yourself to ask for a commitment, automation ensures that no task is missed.

I'm all about efficiency, and Insightly CRM's automation tools help me make sure I never forget a key step in the negotiation process. It takes the manual work out of managing follow-ups and tasks, so I can focus on building relationships and pushing the deal forward.



Workflows in Insightly CRM help you automate tasks at every stage of the negotiation process. Once a certain stage is reached—whether it's the demo stage or the proposal stage—Insightly CRM automatically triggers the tasks needed to keep the negotiation moving forward. This ensures that you're always asking for something in return, and it keeps the deal on track.

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Chapter Four

Empowering Your Sales Team: Real-Time Visibility and Reporting

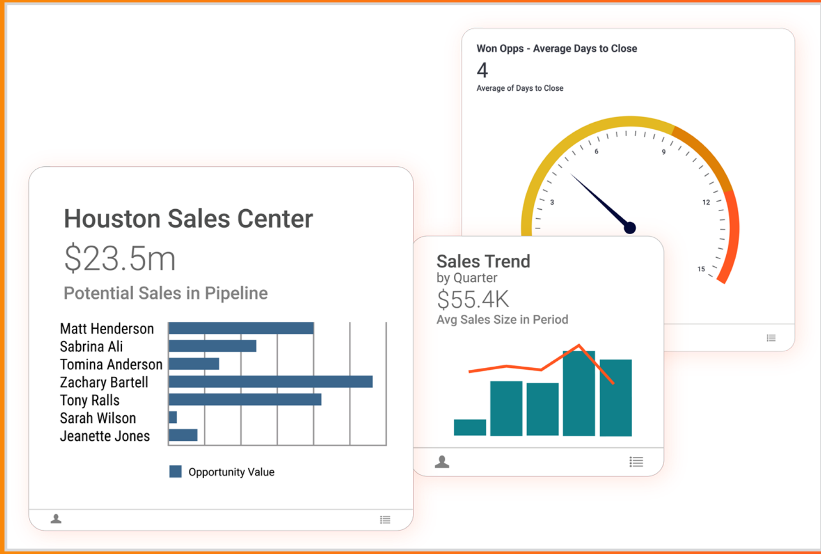
As a sales leader, I need to know exactly where my deals stand at all times. I need to be able to evaluate whether the negotiation is progressing as planned or if it's time to step in and rebalance things. The key to maintaining that control is having the right data at my fingertips.

With Insightly CRM, I can customize my dashboard to give me real-time visibility into each deal's health. I can see which deals are moving forward, which ones need attention, and where I need to push for a "get" in return. This visibility ensures I'm not caught off guard by any unbalanced negotiations.

Having this data at my fingertips also means I can empower my sales team. Instead of micromanaging each deal, I can coach my team based on the data. I can ask the right questions, ensure they're asking for something in return, and make sure they stay on track toward closing the deal.

USE CASE FOR INSIGHTLY CRM:

Real-Time Dashboards



Insightly CRM's dashboards provide real-time insights into the health of each deal. You can customize your dashboards to track key metrics, such as deal value, probability of closing, and the status of negotiations. This gives you a clear picture of where your deals stand and where you need to focus your efforts.

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Conclusion

The Right Tools for Balanced Negotiations

Negotiating isn't about tricking your prospect into a deal—it's about creating a fair and balanced exchange where both sides feel good about the outcome. By tracking your "gives" and "gets" at every stage of the process, you can ensure that you're staying aligned with your negotiation goals.

Insightly CRM helps you stay organized, automated, and focused on what matters most: moving your deals forward with equality. With the right tools, you can make sure every negotiation is fair, transparent, and ultimately successful.

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