

Case study: How a Financial Services Director used 360-HappiU[®] to negotiate effectively



Editor's note: Dovanson is a Financial Services Director who utilises effective negotiation to make financial advisory a reassuring experience for customers. He's a satisfied client of 360F who enjoys using their scoring tool called 360-HappiU[®].

What is your current role in your company?

I'm a Financial Services Director with reporting advisors under me.

How do you use 360-HappiU[®] with your prospects?

I use it as a pre-sales engagement exercise. My prospects kickstart the pre-sales journey themselves as it is easy for them to self-indicate their personal financial needs and priorities. The exercise also enables them to score their future financial satisfaction. (Editor's note: Scoring the financial satisfaction is the 360-HappiU[®] microservice). It even shows them how they can increase their score. This pre-sales exercise give my prospects greater buy-in and control from the get-go.

..and their responses so far?

I had two prospects who were shocked by the magnitude of their financial gaps but they were also motivated to get into action. The exercise showed them that they had the means to increase their financial satisfaction.

Is it fair to say that they were open to proposals after seeing their 360-HappiU®?

Definitely! It was important that they could see the configured solutioning in real-time, keeping up the momentum. I even could revisit past proposals with prospects who were unsure then.

What about negotiation?

In the past, I had to negotiate up. Prospects often low-ball themselves. Using 360-HappiU® in the pre-sales engagement however, my prospects are started off right from a maximum feasibility angle. Negotiating downwards is way more easily accepted than upwards.

Discuss more?

Drop us an eMail here: clarie.kwa@360f.com