



NEGOTIATION PREP WORKSHEET

DECIDE WHAT YOU WANT

- What's your ideal job?
- When were you happiest in your work or at home? How are things different now?
- Is there something that you love but have stopped doing?
- Whom do you admire or envy? Why?
- Are you good at something that you never get to do?
- What drives you crazy or could be better?
- What will you regret if you never do?
- What do you need to feel happy? Are any of these missing from your life?
 - Stimulating, challenging work
 - Likable colleagues
 - Feeling that you're part of a team
 - Power and responsibility
 - Autonomy
 - Flexibility
 - Clear evidence that your work is respected
 - Freedom to be creative
 - Feeling that you're making a contribution/doing something worthwhile
 - Potential for widespread recognition
 - Opportunities to learn new things
 - Rewarding friendships
 - A stable, happy private life
- Who are your role models?
- What would you want if you were certain you could get it?

Short-term goals

- Personal
- Financial
- Health
- Hobbies
- Self Improvement
- Material
- Philanthropic
- Political
- Just fun

Long-term goals

- Personal
- Financial
- Health
- Hobbies
- Self Improvement
- Material
- Philanthropic
- Political
- Just fun

Factor in fairness

- Are you being paid what you're worth?
- Have you been promoted to the level you deserve?
- Does your title describe your level of responsibility and authority?
- Are you progressing in your career at a brisk pace?
- Are you being given assignments that use all your talents?
- Are you doing work commensurate with your abilities?
- Do you feel recognized for the full scope of your contribution?
- Are you doing more than your share of the household chores?

DO YOUR HOMEWORK

Size up the situation you're dealing with

- Number of issues.
- Number of parties.
- Nature of your relationship.
- Will the contract be binding?
- Costs and benefits of delay.
- Is there "linkage"? (Will the outcome affect negotiations with others?) If so, who will be affected and how?
- Will the process and/or outcome be public or private?
- Behavioral norms for negotiation in this situation.
- Are there precedents for what you're asking?

Identify sources of information you need

- Websites
- Trade publications
- Business press
- Professional associations
- Mentors
- Supervisor or manager
- Networks
- Colleagues
- Friends

Find out what you can about the other side

- How well is the organization doing?
- What are the organization's short-and long-term plans?
- What are the other side's interests
 - Concerns
 - Priorities over the issues
 - Likely target(s)
 - Likely BATNA
- How do decisions get made?
 - Who has influence over the decision-making process?
 - Relevant policies, procedures, and precedents.
 - Internal political issues that may influence the outcome.
- What common goals do you share with the other side?
- Where do your interests conflict with those of the other side?
- What problems might prevent them from giving you what you want?

ASSESS YOUR BARGAINING POWER

- Education
- Training
- Special skills, unique strengths
- Work history
- Depth of knowledge or expertise
- Years of experience
- Demonstrated performance excellence
- Reputation in your field
- Awards won
- Important outside contacts
- Support of a powerful mentor
- Social or interpersonal skills
- Leadership or team-building abilities
- Internal alliances (if you're employed)
- Knowledge of the organizations culture, processes, history
- Flexibility (re: timing, scheduling, etc.)
- Alternatives (another offer?)
- Strong BATNA
- Weak BATNA on other of table
- Preparation
- What sets you apart from your peers?
- Why does the other side need you?

Boost your bargaining power

- Improve your credentials.
- Improve your BATNA (get another offer?).
- Make yourself indispensable.
- Think creatively about ways to help your organization:
 - Can you give something up?
 - Can you do something extra?

MAKE STRATEGIC DECISIONS

Approach

- Competitive (single-issue negotiation, relationship will not continue).
- Cooperative (multi-issue negotiation or ones that involves longterm relationship).
- What information will you reveal (and in what order) and what will you conceal?

Mode of communication

- Face to face
- Telephone
- Email
- Letter

Timing

- How much time do you need to prepare?
- When will your bargaining power be highest?
- What is the best time for the other side?

Location

- Find a location that will be free of distractions.
- Chose a room setup that promotes cooperative discussion
- Decide whether aids such as a whiteboard, flip chart, blackboard, or projector would be useful.

Opening

- Should you make the first offer?
- How much information do you have about the other side's reservation value?
- Can you anchor the negotiation and influence the other side's estimates of your reservation value if you go first?
- How can you punt if the other side wants you to go first and you don't want to?
- Estimate the number of rounds the negotiation is likely to go.

CHOOSE THE TACTICS

Offers and concessions

- Decide on a first offer that anchors the negotiation above your target.
- Choose counter offers that will position your target halfway between each of their offers and yours.
- Plan to concede less in each round, and to use the amount you concede on each round to influence their perception of your reservation value.
- Develop phrases to put the ball back in the other court.
- Identify a proposal from the other side that's close enough to your target to offer to split the difference.

Win / Win

- Ways to initiate the negotiation that convey a cooperative approach.
- Descriptions of your interests (not positions).
- Questions that will allow you to identify their basic interests.
- Information to share that will illustrate your interests and perspective.
- Identify pairs of issues that you think you can logroll—lower priority items you'd be willing to trade in return for things you want more.
- Techniques and phrases that you can use to deescalate conflict.
- Methods for generating creative solutions that address both sides' interests.
- Ways to move the other side away from defending his or her position and over to problem solving.
- Comments, actions or gestures that will build trust and promote the alliance.

Style

- Mannerisms that will help you present yourself as “relentlessly pleasant.”
- Nonverbal behavior that will reinforce your cooperative approach.
- Phrases that suggest a “let's work together” attitude.
- Positive ways to frame your argument.

GET READY

Roleplay

- Choose a partner.
- Schedule a time.
- Find a room.
- Rehearse and repeat.
- Figure out what will put you in an upbeat, positive mood beforehand.
- Choose incentives to reward yourself with after it's over.

Stay calm and close the deal

- Compose constructive responses to roadblocks.
- Plan strategies to delay or take a break if necessary.
- Consider ways to get the negotiation back on track if it loses focus or veers toward impasse.
- Imagine ways to prevent yourself from compromising in the heat of the moment.
- Design open-ended questions to slow things down and get the other side to clarify its point of view.
- Develop questions to ask if you don't understand why they're resisting giving you what you want.
- Are they worried about how they will justify the agreement to others?
- Is there not enough in it for them?
- Are they afraid to set a new precedent that will influence future negotiations with others?
- Is your negotiation a low priority for them?
- Are they waiting for more information or to see how other issues resolve themselves?

Keep your BATNA in mind and know when to walk away!