

# NEGOTIATION PLANNING

10 steps to plan your negotiation in advance for the best chance of success.

## 1 What is the problem we are trying to solve?

Problem Statement: I must negotiate with *(person)* to *(solve what problem)*.

## 2 My Goals & Their Decision-Makers

My specific, high expectation:

Target decision-maker:

Bottom Line:

Influencers. (Should I negotiate with these people first?)

## 3 Underlying Needs & Interests (Shared, Ancillary, Conflicting)

Mine

Theirs

## 4 Leverage

What do I lose if there is no deal?

If no deal, what do they lose?

What steps or alternatives will reduce these losses?

Can I influence their alternatives or make their status quo worse?

## 5 Possible Proposals

Options: Build on shared interests/bridge conflicting interests/be creative.

## 6 Authoritative Standards & Norms

Mine

Theirs

My Counter Arguments

## 7 Third-Party Leverage

Can I use a third party as leverage? As an excuse? As an audience? Coalition Partner?

Leverage Favors:  Me  Other Party  About Even

(Who has the most to lose overall from no deal?)

## 8 Situation & Strategy Analysis

Situation as I see it:

\_\_\_\_\_ Transaction      \_\_\_\_\_ Balanced Concerns  
\_\_\_\_\_ Relationship      \_\_\_\_\_ Tacit Coordination

My basic style is \_\_\_\_\_  
so I need to be more \_\_\_\_\_  
in this situation.

Situation as they see it:

\_\_\_\_\_ Transaction      \_\_\_\_\_ Balanced Concerns  
\_\_\_\_\_ Relationship      \_\_\_\_\_ Tacit Coordination

Their Expanded Strategy:

\_\_\_\_\_ Competitive      \_\_\_\_\_ Problem Solving  
\_\_\_\_\_ Compromise      \_\_\_\_\_ Avoiding  
\_\_\_\_\_ Accommodating

## 9 Best Modes of Communication

\_\_\_\_\_ Agent      \_\_\_\_\_ Face to Face  
\_\_\_\_\_ E-Mail      \_\_\_\_\_ Teleconference  
\_\_\_\_\_ Telephone      \_\_\_\_\_ Instant Message

## 10 Overall Positioning Theme

A short statement that sums up your underlying purpose in this negotiation.

Adapted from *Bargaining For Advantage* by Richard Shell. Penguin Books. 2nd Edition, 2018.  
[Click here to Buy it on Amazon.](#)