

NEGOTIATION PLANNING WORKSHEET
COMPANION TO CHAPTER 3



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I. Context / Players / Problem Statement / Issue Identification

I must negotiate with whom to solve what?

What is the context? Purely transactional? Is there a relationship? Is it important to preserve it? A hybrid of transactional and relationship? Synchronous? Asynchronous?

Situation as they see it: Transactional / Relationship / Hybrid

What issues need to be addressed? Is the manifesting problem the root problem? How do they view the problem?

II. Interests underlying Positions (Shared/Conflicting/Ancillary)

Mine

Theirs

III. Goals (asking for a pony when you want a kitten)

My Specific, High, Justifiable Goal:

Reservation Point / Bottom Line (“no deal is better than a bad deal”):

IV. Concession Plan (including decoy concessions)

V. Objective Standards & Norms

Mine	Theirs	My Counter Arguments

VI. Leverage and Alternatives

Mine

If no deal, my best backup plan is:

If no deal my worst-case scenario is:

If no deal my most likely alternative is:

Can I improve this?

At the outset, leverage favors: Me Other Party About Even
(Who has the least to lose from "no deal" overall?)

Theirs (known or guesses)

If no deal, their best backup plan is:
If no deal their worst-case scenario is:
If no deal their most likely alternative is:
Can I influence their alternatives?

VII. Third Party Factors

Can I use a third party as leverage?
As an excuse or as an audience?
As an alliance partner /precedent (social proof)?
Who/What could derail a deal or its execution?

VIII. "What if . . ." (Ideas and Proposals)

Build on Shared Interests | Bridge Conflicting Interests

Creative Options:

IX. Planning for the Use of Information

Give	Get	Guard

X. Style and Strategy Analysis

My basic style is: _____

Their expected strategy / style: _____

So I need to be _____ in this situation.

XI. Personal reflection / Ideas for effectiveness in this negotiation

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XII. What help do I need

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**Based upon Appendix B of G. Richard Shell's Bargaining For Advantage, Penguin Books, 1999*