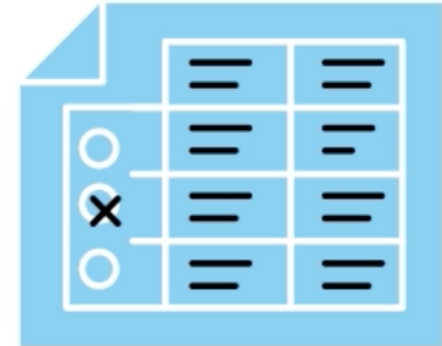


# Negotiation Preparation Worksheet

The Negotiation Preparation Worksheet is a tool for capturing important information and analysis in advance of a negotiation. Our episode "More than Hope" describes the thinking that goes into this important part of negotiation preparation.

This worksheet builds on and integrates a number of the other worksheets featured in the Negotiable tutorial, such as the Negotiation Compass worksheets and the Discovery Agenda worksheet. It is not necessary to have completed any of these other worksheets in advance, but if you have completed them, you might want to have them at hand so you can draw on your prior work.



**Negotiation Preparation Worksheet**

1. Write issues, articulate your preferences, priorities, and Plan B  
 2. Step into your counterpart's shoes  
 3. Map out the other side  
 4. Shape the process  
 5. Build trust, eliminate barriers and how to set them  
 6. Prepare an information strategy

**ME** | **THEM**

Definition of success	Plan B and/or limits	What do I want?	Why do I want it?	How much do I care?	What do they want?	Why do they want it?	How much do they care?
Have fun with friends, stay within budget Puerto Vallarta		\$160 max	Friends' limit	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Make most money possible (?) Other tourists (?)	Most possible Make a profit	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
		8-11 am	Catch fish, enjoy day	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>		?	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>
		~3 hrs	Catch fish, enjoy day	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Shorter (?) Less gas, work (?)		<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>

**ME**

Who else matters?  
My friends  
Other customers

How can I best use others?  
Say friends are "tying my hands"  
Team up with other customers?

**THEM**

**DISCOVER:** What do I need to know? How can I learn it?  
"Their Plan B and preferred start time... ASK!"

**DISCOVER:** What might they ask? What will I reveal?  
Reveal friends' limit, price is priority

**DISCOVER:** How can I best frame my proposals?  
Love for fishing

What process would I use?  
Ability to analyze deal, no resentment

How can I shape the process?  
Negotiate alone and notify with friends, no time pressure

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In the pages that follow you'll find a blank version of the worksheet as well as an example illustrating how the worksheet might be filled out. That example follows the case of Michael in Sayulita, described in Episodes 1 and 5.

The worksheet provides space for notes about three issues. If your negotiation involves more issues, as many do, simply use multiple copies of the worksheet to capture your notes.

It's almost certain that you won't be able to know everything about your counterpart in advance. The remaining questions you have can inform your information strategy, including things to discover as the conversation unfolds.

# Negotiation Preparation Worksheet

- 1 Define success; articulate your preferences, priorities, and Plan B
- 2 Step into your counterpart's shoes
- 3 Diagnose the issue mix
- 4 Shape the process
- 5 Think about relevant parties and how to use them
- 6 Prepare an information strategy

1 *The Private Drama* 

ME

2 *The Partner Drama* 

THEM

*The Package Drama* 

- 3
- Fixed pie
  - Compatible
  - Lopsided

Issues being negotiated

Issue #1

- Fixed pie
- Compatible
- Lopsided

Issue #2

- Fixed pie
- Compatible
- Lopsided

Issue #3

Definition of success:

Plan B and/or limits:

What do I want?

Why do I want it?

How much do I care?

- Low
- Medium
- High

Definition of success:

Plan B and/or limits:

What do they want?

Why do they want it?

How much do they care?

- Low
- Medium
- High

- Low
- Medium
- High

- Low
- Medium
- High

[capture notes on additional issues by duplicating the worksheet as needed]

4  *The Process Drama*

What process would help?

How can I shape the process?

5  *The Party Drama*

Who else matters?

How can I best use others?

6  *Information strategy*

DISCOVER: What do I need to know? How can I learn it?

DIVULGE: What might they ask? What will I reveal?

DESCRIBE: How can I best frame my proposals?

# Negotiation Preparation Worksheet

- 1 Define success; articulate your preferences, priorities, and Plan B
- 2 Step into your counterpart's shoes
- 3 Diagnose the issue mix
- 4 Shape the process
- 5 Think about relevant parties and how to use them
- 6 Prepare an information strategy



ME



THEM



Definition of success: *Have fun with friends, stay within budget*

Plan B and/or limits: *Puerto Vallarta*

Definition of success: *Make most money possible (?)*

Plan B and/or limits: *Other tourists (!?)*

Issues being negotiated

Issue #1

*Price*

What do I want? *\$160 max*

Why do I want it? *Friends' limit*

How much do I care?  Low  Medium  High

What do they want? *Most possible*

Why do they want it? *Make a profit*

How much do they care?  Low  Medium  High

Issue #2

*Start time*

What do I want? *8-11 am*

Why do I want it? *Catch fish, enjoy day*

How much do I care?  Low  Medium  High

What do they want? *?*

Why do they want it? *?*

How much do they care?  Low  Medium  High

Issue #3

*Duration*

What do I want? *~3 hrs*

Why do I want it? *Catch fish, enjoy day*

How much do I care?  Low  Medium  High

What do they want? *Shorter (?)*

Why do they want it? *Less gas, work (?)*

How much do they care?  Low  Medium  High

[capture notes on additional issues by duplicating the worksheet as needed]



What process would help? *Ability to analyze deal, no resentment*

How can I shape the process?

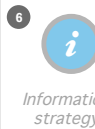
*Negotiate alone and ratify with friends, no time pressure*



Who else matters? *My friends  
Other customers*

How can I best use others?

*Say friends are "tying my hands"  
Team up with other Customers?*



DISCOVER: What do I need to know? How can I learn it? *Their Plan B and preferred start time ... ASK!*

DIVULGE: What might they ask? What will I reveal?

*Reveal friends' limit, price is priority*

DESCRIBE: How can I best frame my proposals?

*Love for fishing*