



## How to check my negotiation preparation

A checklist to make sure you have covered everything when negotiating.

When entering into a negotiation, preparation is vital. So use this checklist to ensure that you cover everything that you need to make it a successful outcome.

1

### Team Planning

- |  |                          |   |                          |
|--|--------------------------|---|--------------------------|
| 1. Timescales agreed                     | <input type="checkbox"/> | 8. Location determined                              | <input type="checkbox"/> |
| 2. Team members determined               | <input type="checkbox"/> | 9. Impact of others in your organisation understood | <input type="checkbox"/> |
| 3. Individual roles agreed               | <input type="checkbox"/> | 10. Agenda written and issued                       | <input type="checkbox"/> |
| 4. Leader agreed                         | <input type="checkbox"/> | 11. Pre negotiation planning meeting set up         | <input type="checkbox"/> |
| 5. Individuals authorities agreed        | <input type="checkbox"/> | 12. Team members set time a side for activities     | <input type="checkbox"/> |
| 6. Suppliers team members known          | <input type="checkbox"/> |   |                          |
| 7. Supplier individual authorities known | <input type="checkbox"/> |   |                          |

## 2

### Information Planning

- |   |                          |  |                          |
|---|--------------------------|--|--------------------------|
| 1. Business requirements fully documented | <input type="checkbox"/> | 5. Previous negotiations with supplier reviewed      | <input type="checkbox"/> |
| 2. Nature of market understood            | <input type="checkbox"/> | 6. Information gaps determined                       | <input type="checkbox"/> |
| 3. Suppliers perception of us understood  | <input type="checkbox"/> | 7. Sources of information gaps determined            | <input type="checkbox"/> |
| 4. Supplier research undertaken           | <input type="checkbox"/> | 8. Information to be shared with supplier understood | <input type="checkbox"/> |

## 3

### Objectives Planning

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| 1. Strategy defined (Tactical / Strategic)            | <input type="checkbox"/> | 7. Technical requirements established               | <input type="checkbox"/> |
| 2. Specific requirements determined for each variable | <input type="checkbox"/> | 8. Commercial arrangements (T&C's) established      | <input type="checkbox"/> |
| 3. Ideal outcome determined                           | <input type="checkbox"/> | 9. Required price models established                | <input type="checkbox"/> |
| 4. Targets agreed                                     | <input type="checkbox"/> | 10. Reliability aspects established                 | <input type="checkbox"/> |
| 5. Minimum 'must haves' understood                    | <input type="checkbox"/> | 11. Performance aspects established                 | <input type="checkbox"/> |
| 6. High but realistic aspirations set for team        | <input type="checkbox"/> | 12. Regulatory and ethical requirements established | <input type="checkbox"/> |

# 4

## Conditioning Planning

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| 1. New potential business for supplier understood | <input type="checkbox"/> | 3. Transmission methods agreed for messages     | <input type="checkbox"/> |
| 2. Key messages agreed                            | <input type="checkbox"/> | 4. Wider stakeholders expectations communicated | <input type="checkbox"/> |

# 5

## Process Planning

- |   |                          |  |                          |
|---|--------------------------|--|--------------------------|
| 1. Activities agreed                          | <input type="checkbox"/> | 6. Exploring possibilities scripted          | <input type="checkbox"/> |
| 2. Persuasive methods to be used agreed       | <input type="checkbox"/> | 7. Influencing approaches detailed           | <input type="checkbox"/> |
| 3. Major concessions determined               | <input type="checkbox"/> | 8. Repositioning stance detailed             | <input type="checkbox"/> |
| 4. Expected returns from concessions detailed | <input type="checkbox"/> | 9. Approach to finalising agreement detailed | <input type="checkbox"/> |
| 5. Setting the scene scripted                 | <input type="checkbox"/> | 10. Summarising responsibilities understood  | <input type="checkbox"/> |



The more ticks you have in boxes the better prepared you will be for the negotiation itself. Use this list as a great starting place, but make sure you add to the list any specific requirements for your situation. A thorough job done at this stage will pay dividends later on, so don't cramp the time you allow yourself to prepare. Schedule all meetings well in advance and make sure you block out preparation time in the teams diaries.