

SHAPIRO NEGOTIATIONS INSTITUTE – PREPARATION PLANNER

Name of Client: _____ Prepared By: _____ Date: _____ Approved By: _____

You won't have all of the answers as you fill out this planner. Make sure you write down the probing questions that you plan to ask (and to whom you need to speak) to get those answers. Use W.H.A.T. also. Spend as much time thinking through the other party's side as you do your own (if not more).

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| CHALLENGE | |
| SITUATION SUMMARY | |

| | Your Company | Prospect/Client <i>(May be speculative – Probe.)</i> |
|---|---------------------|---|
| PRECEDENTS <i>Transactions that can influence the discussion or provide a model for guidance Competitive Pricing/Terms. Examples of results from similar situations For other side, consider how you can counter their precedent.</i> | | |
| ALTERNATIVES <i>What variations might you offer in place of your "highest-goal" proposal? What could happen if things don't work out? Their options, if not your company?</i> | | |
| INTERESTS <i>What objectives or desires does each side have beyond their stated positions? What do you (and they) really want?</i> | | |
| TEAM <i>Are you doing this alone or with others? What's everyone's role? What do you know about other side participants? Authority? Their personalities?</i> | | |

SPECIFIC TO YOUR COMPANY

| DEADLINE | STRENGTHS | WEAKNESSES | HIGHEST GOAL | WALKAWAY |
|----------|---|--|--------------|----------|
| | <ul style="list-style-type: none"> • • • | <ul style="list-style-type: none"> • • | | |

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| STRATEGY/NEXT STEPS <i>What is your plan? Do you need more than one meeting? Probing questions. Initially set out your proposal for achieving your goals rather than meeting your bottom line (it would be useful to write out the proposal in script form and practice in advance).</i> | <ul style="list-style-type: none"> • • • • • |
|--|---|

| | |
|------------------|--|
| UPDATE | |
| DATE ____ | |

The purpose of this form is to provide a format for organizing ideas that will help you set a strategy for your negotiations. It is not intended that you fill in this form with every piece of information at your disposal. Instead you should provide bullet points that will serve to enable you to talk more efficiently with others when discussing the negotiation. You should not feel as if you need to write a complete answer on the form itself, but you should be able to provide that answer when asked questions generated from someone's review of the bullet points on your Planner. The most important part of this Planner is the section on Strategy. Where appropriate, you should script out major discussion points that will occur during the negotiation.