

# The best way to get better as a negotiator is with other people

Here's how to create

## DEAL TEAMS

with



**Deal Teams** are a way for people from all levels of expertise to learn and improve their bargaining skills together

**Negotiable** is a digital tutorial that helps people build and apply their ability to coordinate with others to achieve success

### FORM A TEAM



### PICK A MODEL



### MEET UP

Assemble a group that's ready learn together. A team size of 3 to 6 is ideal, but anywhere from 2 to 12 can work.

**Have a mentor?** Mentors aren't necessary but can add a lot to the Deal Team experience, contributing insights to discussions and playing a facilitator role. See **pages 11-12** for suggestions.

Choose from one of the recommended learning models, ranging from one to five meetings. See the pages after this one for more details.

**Got your own agenda?** Tune the number and length of meetings—and the topics—to your team's interests and availability.

Meetings usually last about an hour—and are much more useful when everyone does a little work in advance.

**Ready to roleplay?** Meeting multiple times provides an opportunity for the group to do and debrief one or more hands-on roleplays.

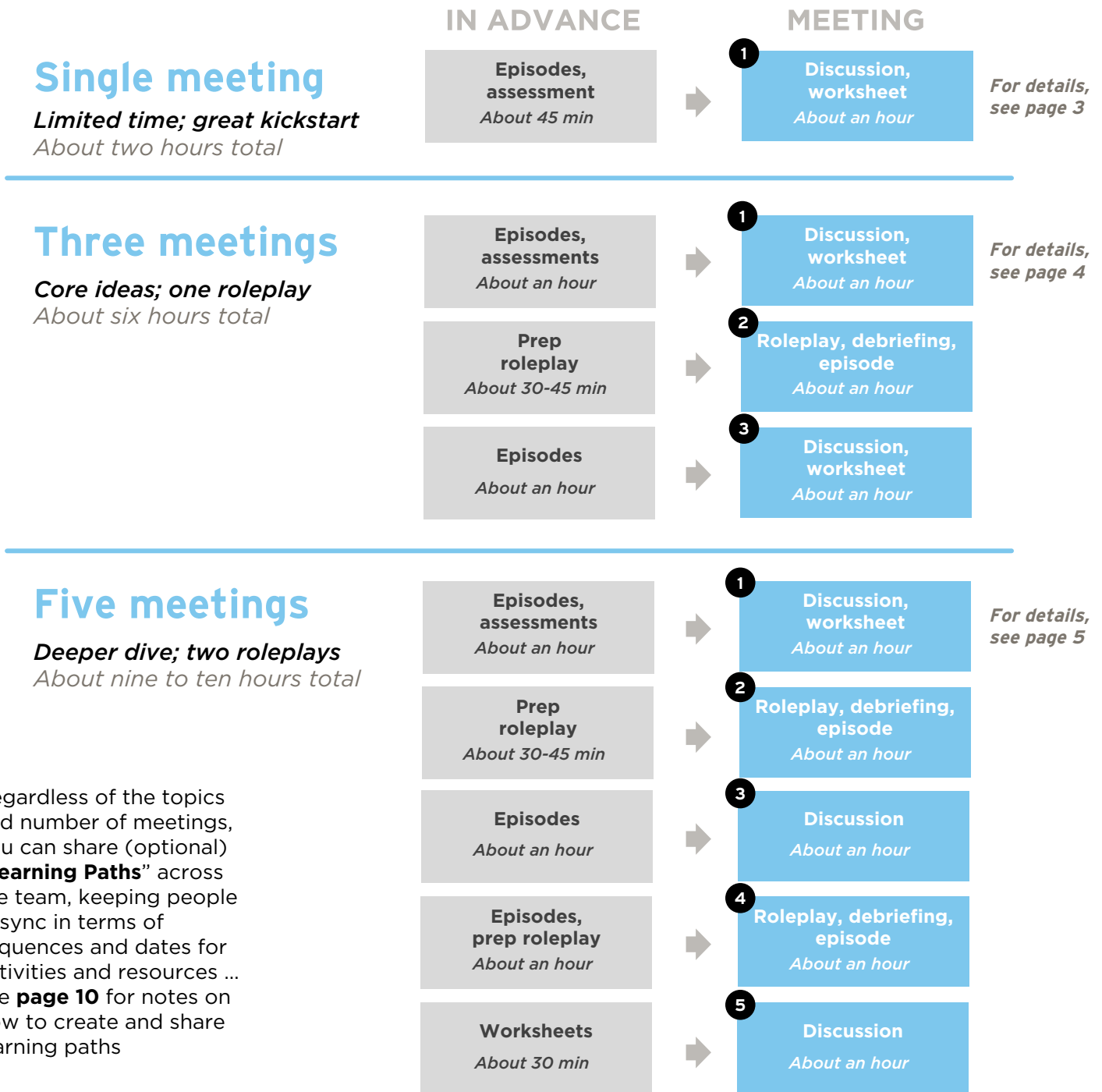
**Connecting remotely?** See our suggestions on **page 9**



If your team has a special interest in **job negotiations**, you might focus entirely on that topic—or combine sessions on that topic with one of our other models. See **page 7** for more information.

# Meeting model overview

Our recommended models are shown below. Meetings can be spread out over time. Most teams find that meeting between once-a-week and once-a-month works best. The pages after this one provide detailed recommendations on how to approach meetings for each of the models noted here.



Regardless of the topics and number of meetings, you can share (optional) “**Learning Paths**” across the team, keeping people in sync in terms of sequences and dates for activities and resources ... see **page 10** for notes on how to create and share learning paths

**Interested in job negotiations?**

See page 7

**Want to see other possible topics?**

See page 8

**Connecting remotely?**

See page 9

**Joined by a mentor?**

See pages 11-12

# Single meeting model: Details

## WHY THIS MODEL?

A single meeting works when a Deal Team won't have the time, or can't gather the group, for multiple meetings. It can provide a great kickstart for learning—and we urge Deal Team members to continue further on their own after the meeting.

### IN ADVANCE

*About 45 minutes*

- Complete Habits assessment
- Watch “We are all Michael”
- Watch “The Road to Nirvana”
- Watch “The Drama of Dealmaking”

### MEETING

*About an hour*

- Discuss: What upcoming negotiations are we facing?
- Discuss: Takeaways and reflections on initial episodes
- Discuss the Habits assessment results: Which dramas are easier or harder for us?
- Complete the Dream Situations worksheet; discuss your responses
- Discuss plans for ongoing development

### Tailor this model to your interests and time:

- Extend the meeting into a viewing party: watch the episodes together
- Focus more on general personal development: skip discussion of upcoming negotiations and add discussion of the Changing a Habit worksheet
- Focus more on specific upcoming situations: skip the Dream Situations worksheet and help one another prep for upcoming bargaining episodes

### Consider follow-up activities:

- Watch Episodes 4 and 5, completing the first part of the Negotiable episodes ... and continue on with other episodes according to your interests
- Follow the individualized advice in your Habits assessment results report, including recommendations for episodes, worksheets, and other activities
- Reconvene the team to practice a hands-on roleplay (see the recommendations for Meeting 2 of the three meeting model)

*If your team can't meet up in person see [page 9](#) for suggestions on **connecting remotely***

# Three meeting model: Details

## WHY THIS MODEL?

A three meeting model brings a Deal Team together several times for discussions and a hands-on roleplay. Nearly all users find the roleplay fun—and say that it propels insights about themselves and about bargaining in general.

### MEETING 1

#### IN ADVANCE

*About an hour*

- Complete Habits assessment and Attitudes assessment
- Watch “We are all Michael”
- Watch “The Road to Nirvana”
- Watch “The Drama of Dealmaking”

#### MEETING

*About an hour*

- Discuss: What upcoming negotiations are we facing?
- Discuss: Reflections on initial episodes
- Discuss Attitudes assessment: How do we feel about bargaining?
- Discuss the Habits assessment: Which dramas are easier or harder for us?

### MEETING 2

#### IN ADVANCE

*About 30-45 min*

- Prepare for “A New Lease at The Workshop” roleplay: agree on landlord and tenant roles in advance; read material that corresponds to your role

#### MEETING

*About an hour*

- Enact the roleplay; if you have 4 or fewer people, consider taking turns playing the roles; with 5+, break into separate groups
- Follow the debriefing materials, watching “The Dealmaker’s Dilemma” episode
- Watch “Return to Sayulita” episode
- Wrap-up reflections

### MEETING 3

#### IN ADVANCE

*About an hour*

- Watch “Defining success”
- Watch “Preferences, Priorities, and Plan B”
- Watch “Gearing up for Camp David”
- Watch “Stepping into Your Counterpart’s Shoes”

#### MEETING

*About an hour*

- Discuss: How do the Private and Partner Dramas apply to situations we face? Other takeaways from the episodes?
- Complete the Dream Situations worksheet; discuss your responses
- Complete the Changing a Habit worksheet; discuss your responses and plan for change

## Tailor this model to your interests and time:

- Extend meetings into viewing parties: watch the episodes together
- Focus more on personal development: hold one another accountable on plans for change
- Focus more on upcoming situations: emphasize prep for looming bargaining episodes

## Consider follow-up activities:

- Watch episodes on information strategy, openings, and addressing interests
- Reconvene the team to review change plans and for more hands-on practice (see the recommendations for Meeting 4 of the five meeting model)

If your team can't meet up in person see [page 9](#) for suggestions on **connecting remotely**

# Five meeting model: Details

## WHY THIS MODEL?

A five meeting model features two roleplays, giving Deal Team members multiple opportunities for hands-on learning and practice. This model also goes deeper into Negotiable’s content, exploring dynamics around “Information Strategy,” including what information to reveal (or conceal) and what to discover.

### MEETING 1

#### IN ADVANCE

*About an hour*

- Complete Habits assessment and Attitudes assessment
- Watch “We are all Michael”
- Watch “The Road to Nirvana”
- Watch “The Drama of Dealmaking”

#### MEETING

*About an hour*

- Discuss: What upcoming negotiations are we facing?
- Discuss: Reflections on initial episodes
- Discuss Attitudes assessment: How do we feel about bargaining?
- Discuss the Habits assessment: Which dramas are easier or harder for us?

### MEETING 2

#### IN ADVANCE

*About 30-45 min*

- Prepare for “A New Lease at The Workshop” roleplay: agree on landlord and tenant roles in advance; read material that corresponds to your role

#### MEETING

*About an hour*

- Enact the roleplay; if you have 4 or fewer people, consider taking turns playing the roles; with 5+, perhaps break into separate groups
- Follow the debriefing materials, watching “The Dealmaker’s Dilemma” episode
- Watch “Return to Sayulita” episode
- Wrap-up reflections

### MEETING 3

#### IN ADVANCE

*About an hour*

- Watch “Defining success”
- Watch “Preferences, Priorities, and Plan B”
- Watch “Gearing up for Camp David”
- Watch “Stepping into Your Counterpart’s Shoes”

#### MEETING

*About an hour*

- Discuss: What’s our experience with the Private Drama and goaljacking? How can we harness this drama in future situations?
- Discuss: What should we seek to understand about our counterpart’s in future situations—and how can we do that?

*Continued on the next page ...*

# Five meeting model: Details

Continued from the previous page ...

## MEETING 4

### IN ADVANCE

*About an hour*

- Watch “Preparing to Discover”
- Watch “Preparing to Divulge and Describe”
- Prepare for “Perfect Slice” roleplay: agree on buyer and seller roles in advance; read material for your role

### MEETING

*About an hour*

- Discuss takeaways from episodes
- Enact the roleplay, following instructions in the materials
- Debrief case, including watching “Address Interests” episode
- Wrap-up reflections

If you have 4 or fewer people, consider taking turns playing the roles; with 5+, break into separate groups

## MEETING 5

### IN ADVANCE

*About 30 min*

- Complete Discovery Agenda and/or Action/Reaction worksheets with a future situation in mind
- Complete the Dream Situations worksheet

### MEETING

*About an hour*

- Discuss the worksheets and information strategy for future situations
- Discuss the Dream Situations worksheet
- Complete the Changing a Habit worksheet; discuss responses and plan for change
- Wrap-up reflections

### Tailor this model to your interests and time:

- Extend meetings into viewing parties: watch the episodes together
- Focus more on personal development: hold one another accountable on plans for change
- Focus more on upcoming situations: emphasize prep for looming bargaining episodes

### Consider follow-up activities:

- Watch the episode on opening moves (Opening Well)
- Reconvene the team to review change plans and/or to debrief real negotiations (use the Post-Negotiation Reflections Worksheet to capture and organize your thinking)

If your team can't meet up in person see [page 9](#) for suggestions on **connecting remotely**

# Focusing on job negotiations

## WHY THIS MODEL?

If job negotiations are of special interest, consider adding one or both of the meetings below to your plan. You can also focus entirely on these meetings. It's not necessary to review any of Negotiable's other materials to get value out of our job negotiation materials—but they will help deepen your bargaining abilities.

The **workbook meeting** draws on our brief videos that focus specifically on job negotiations, with accompanying worksheets to apply those ideas to your own situation. The **roleplay meeting** involves doing a job negotiation roleplay—and can be repeated with different roleplays, giving everyone a chance to be in a job candidate role. Your group can do either or both kinds of meetings, depending on your interests.

## WORKBOOK MEETING



### IN ADVANCE

*About 30 min*

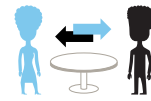
- Watch “Job Negotiations, Part 1”
- Draft responses for worksheets 1-4 in the Job Negotiations Workbook

### MEETING

*About an hour*

- Discuss: Reflections on initial episode and worksheets 1-4
- Watch “Job Negotiations, Part 2”
- Draft responses for worksheets 5-9, spending a few minutes working solo on each and then a few minutes discussing each
- Final reflections

## ROLEPLAY MEETING



### IN ADVANCE

*About 15-30 min*

- Read materials for one of the job negotiation roleplays; coordinate in advance about which roleplay to do and who will be in what role

### MEETING

*About an hour*

- Enact the roleplay, working in pairs or tagging in and out of roles in a single group negotiation
- Follow the roleplay debriefing materials to discuss your experience and draw out observations about yourselves as negotiators and bargaining in general

### Tailor this model to your interests and time:

- Extend the workbook meeting into a viewing party: watch both episodes together
- Pick a roleplay context (for-profit or non-profit) that fits your interests. Consider doing a sequence including both basic and advanced job negotiation roleplays.

### Consider follow-up activities:

- Job negotiation sessions can be a way to kick-off a Deal Team ... and then follow-up by exploring other Negotiable materials, such as the three meeting model
- Reconvene the team to coach and debrief one another for actual job negotiations

# Other topics

Here are suggestions for engaging with other topics you might explore as a Deal Team. This could be in addition to, or instead of, the models presented earlier.

## *We want to focus on ...*

### ➔ **JOB NEGOTIATIONS**

- See **page 7** for a recommendations on using our episodes focused on job negotiations and the accompanying workbook
- **Page 7** also offers describes how to use our collection of job negotiation roleplays

### ➔ **PERSONAL DEVELOPMENT AND ACTION PLANNING**

- Considering focusing on our assessments and personal development worksheets, as in the first sessions of the Three Meeting and Five Meeting models
- Our **Habits and Practices assessment** and our **Attitudes assessment** provide immediate feedback with individualized advice on development, allowing you to benchmark yourself against others ... and retaking these assessments over time allows you to chart progress. You could do these assessments in advance of a meeting and then share and discuss your results during a session
- Our **Dream Situations worksheet** helps you tune in to where you thrive as a negotiator—and what’s hardest for you. That often leads to an idea for development and the **Changing a Habit worksheet** provides a way to plan for change. You can do these worksheets either before or during a session and then share/discuss results

### ➔ **OUR SPECIFIC UPCOMING NEGOTIATIONS**

- To help one or more Deal Team members with concrete preparations for an upcoming negotiation, use the **Five Dramas Audit** for an accelerated review
- For more thorough preparation, use our series of worksheets (and, if possible, the episodes they relate to) that walk through steps in preparation, including the **Dissect the Dramas worksheet**, the **Negotiation Compass: Self worksheet**, the **Negotiation Compass: Counterpart worksheet**, the **Discovery Agenda worksheet**, and the **Action/Reaction worksheet**
- To integrate your planning, consider using the **Negotiation Preparation worksheet**, drawing together analyses from the other worksheets in a single place
- You could complete these worksheets in advance or talk them through together

### ➔ **OPENING MOVES IN NEGOTIATIONS**

- Watch our episode “**Open Well**” and discuss your reactions
- Talk through the “**Opening Acts**” worksheet as it applies to a past or upcoming negotiation

### ➔ **HAVING A GROUP DISCUSSION WITH A MENTOR**

- **Page 11** provides suggestions for discussion topics with a mentor. You could focus an entire meeting on a kind of group interview and conversation
- **Page 12** advises mentors on how they could contribute. Consider sharing that page with them. If they’re leading a discussion, you might share Page 11 with them, too

### ➔ **DEBRIEFING ONE OR MORE RECENT NEGOTIATIONS**

- Consider using the **Post-Negotiation Reflections worksheet** to organize your reflections and discussion on what happened in a recent negotiation. Complete and circulate the worksheet in advance ... or work through it together in a meeting

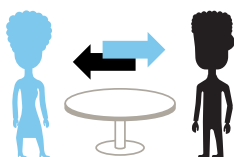


# Connecting remotely

Whenever possible, we urge Deal Teams to meet up in person. This helps to create fluid and free-flowing discussions.

If you can't meet up in person, you can still use a Deal Team model to propel your learning. Voice calls or video chats can work well, giving participants an opportunity to have a live discussion, posing questions and sharing reactions and insights in real-time.

We encourage teams convening remotely to consider a different approach to two elements of the Deal Team models described earlier in this document:



## ROLEPLAYS

If your team is larger than four people, you may want to break up into separate voice or video chats for the roleplays. One approach is to split up for separate roleplay conversations, then reunite as a whole group to debrief and discuss the experience.



## VIDEOS

In some of our recommended sessions (for example, Meeting 2 of the Three Meeting Model), we encourage Deal Team members to watch one or more Negotiable videos together. If you're using a discussion platform that allows someone to play a Negotiable video with audio for the whole group to see, you could watch it together. Otherwise, team members might consider stepping away from the group conversation and each individually watching the video from Negotiable before coming back together to continue the conversation.

# Learning paths

Learning paths are an optional way of keeping track of what's ahead, showing activities over time with links to relevant resources. If you set one, it will appear on your Personal Dashboard, your home page after logging in.

You can reach your Personal Dashboard any time under the My Account menu

To get a recommended a learning path from Negotiable, use the **Learning Path Creator**. Answer a few questions and you'll get a suggested path that you can edit.

Alternately, you can start with a blank path and use the **Learning Path Editor** to manually add and edit individual activities and dates.

One (optional) approach that works well for Deal Teams is to have one person create a learning path for the group, picking a few activities and setting dates. They can then share that path with the other members of the team. Look for these buttons on your Personal Dashboard:

Share your learning path with someone else

Click this to generate a code that you can share with others, letting them copy a snapshot of your learning path

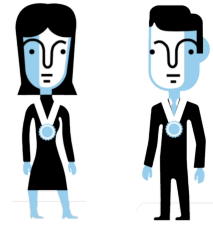
Enter a code to copy someone's path

Click this to enter a code that someone has shared with you, allowing you to set your path to match theirs

Copying a learning path with a code involves a one-time snapshot, not a live link. Any later edits made to either person's learning path are not automatically passed along. Learning paths can be shared again at any time by generating a new code and applying it.

# Making the most of a mentor

Mentors can add a lot of value to a Deal Team experience. If a mentor can join for several meetings, they could add commentary and stories about the topics covered as well as help to debrief roleplays. See the next page for advice we offer to mentors on how they can contribute. Feel free to give them that page—and this one—if you wish. If you have access to a mentor for a single meeting, you might focus that time on hearing from them. Below are questions you could consider for a kind of group interview and discussion. Follow your interests, and their ideas, to drill into what matters most.



## SUGGESTIONS FOR DISCUSSION

### THE PRIVATE DRAMA



#### Why am I doing this?

The negotiation I have with myself: Defining success, clarifying priorities

What have you learned about **clarifying priorities** and **setting limits** in advance—and **abiding** by those things while negotiating? Do you have any insights about **staying focused on what really matters** and not getting misdirected during bargaining? Any mistakes to avoid?

### THE PARTNER DRAMA



#### Who am I dealing with?

My counterpart's perspective; our relationship: How they see the situation and relate to me

What have you learned about **the kind of relationship** to cultivate with a counterpart before or during bargaining? **How** can one create these kinds of relationships? Any mistakes to avoid?

### THE PACKAGE DRAMA



#### What is the best solution?

The substance of the agreement: Offers, proposals, scope of the deal, tradeoffs

What have you learned about **how to put offers on the table**? Do you have any insights about **tradeoffs** to seek out or shun? What moves help with **“growing the pie”**? What have you learned about standing firm and getting good terms when **“slicing the pie”**?

### THE PROCESS DRAMA



#### How, when, and where?

How the conversation unfolds: Time, pace, location, how we communicate

What have you learned about how to **manage the negotiating process**—how and when and where the negotiation will unfold (deadlines, communication channels, etc.)? Any mistakes to avoid?

### THE PARTY DRAMA



#### Who else plays a role?

The cast of characters: Who is involved, the roles they play, how I can leverage them

What have you learned about how to **use and leverage allies** and contacts for effective bargaining? Do you have any insights about **managing the “cast of characters”** during negotiation?

### INFORMATION STRATEGY



#### What should I share and learn—and how?

What information you divulge or hold back, what you seek to discover from a counterpart, and how to best describe your proposals

What have you learned about what **information to share** (and how) and what to **hold back** in bargaining? Do you have any insights on what information is most important to **discover** about a counterpart and **how to uncover** it? What have you learned about how to **make the best case** for a proposal—how to describe an offer in a compelling, persuasive way?

### GENERAL INSIGHTS



#### What should I know? How should I develop?

Any other lessons or advice your conversation partner wants to share

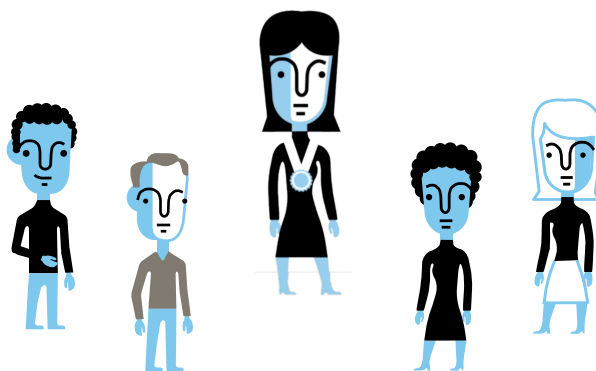
What are **the most important things to know in general** about negotiating effectively? How has your own approach to negotiation **evolved** over time? What **advice** do you have for someone who wants to **develop** their bargaining and negotiation skills?

# I'm a mentor ... how can I help a Deal Team?

Your experience and insights can add a tremendous amount of value to a Deal Team's learning.

If you're joining the group for a single session, you might consider using that time simply as a discussion about your experience and insights. We've recommended a set of questions for teams to consider using with a mentor. You

might ask the team to share questions in advance if you'd like to prepare—but even a spontaneous discussion with no advance work can be incredibly useful.



If you're able to join for multiple sessions, you can add great value just by being an active participant during discussions. Here are three specific helpful things you could do as a mentor to enhance the Deal Team experience:

1

If the team is conducting a **roleplay** exercise, you might first observe others negotiate through at least part of the conversation. Pause the conversation for a brief mid-roleplay reflection, offering any observations you have about what's happening and what you see as more or less effective. You could then step into one of the roles in the negotiation, carrying the roleplay conversation forward, acting as a kind of role model for others to observe.

2

You could **talk about how you yourself have changed** and developed as a negotiator. What was your early approach to bargaining like? How did you change and what prompted those changes? Was changing challenging? What helped you to improve or develop? It often helps developing negotiators to hear from more experienced bargainers that change is possible, even if it isn't always easy, and that developing is worthwhile.

3

People often find value in **stories** that hold some lesson about bargaining. These can be stories of success or setbacks. It can be especially powerful to share **a pair of stories** that highlights the impact of some difference (e.g., a setback versus a success or one approach versus another). Consider sharing one or more concrete stories from your experience that yield some more general takeaways.