OPERATIONS INSIDER

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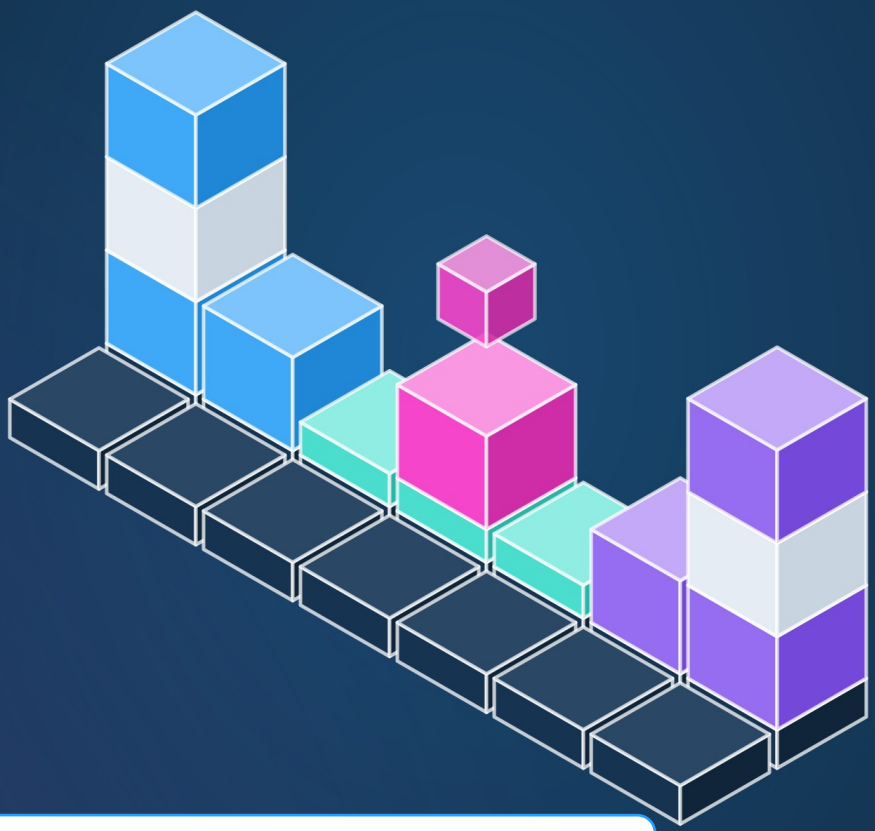
THE MANAGER'S NEGOTIATION QUICK START CHECKLIST

Score your last five negotiations in one hour, with records you can point at.



PREPARE. TRADE. RECORD. LEARN.

START HERE

How to Use This Check

Your last five negotiations, one hour with the people who led them, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Take the last five negotiations above your threshold: preparation notes, offers, mails, minutes, contracts and the first invoices afterward.	Score each statement from 0 to 4. Without a sheet, a log or a record you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across buyers, sellers or deal sizes.
3	Mostly in place and visible in the records.
4	Consistently in place, visible, reviewed and improved.

WHY NEGOTIATION

Purchasing, sales and internal budgets are settled in talks that last an hour and bind the company for a year. Most of the result is decided before the talk: by what you know about your alternative, your limit and the things beside the price that can be traded.

Before You Start

- **Scope:** purchasing, sales and internal negotiations of one department or one plant above an agreed annual value.
- **Evidence:** what was written before the talk, what was written during it and what was checked afterward.
- **Tone:** you check the method, not the negotiators. Ask what they had in hand, not why the result was not better.

THE CHECK

01 Interests, Alternative and Limits

NO.	CHECK	SCORE 0 TO 4
01	Every negotiation above an agreed value has a written preparation sheet before the first talk takes place.	
02	The interests of both sides are written down, and the assumed interests of the other side are marked as assumptions to be tested.	
03	The alternative without agreement is described and costed in EUR, including one-time switching cost and lead time.	
04	A target and a limit are written as numbers before the talk, and the limit follows from the alternative, not from a feeling.	
05	The zone between both limits is estimated in EUR per year, and the estimate of the other side names its source.	

02 Power and Package

NO.	CHECK	SCORE 0 TO 4
06	Dependency, switching cost, time pressure and information are assessed for both sides and backed by evidence.	
07	Actions that improve the own position, such as a second quote or bridging stock, are started before the talk.	
08	At least four topics beside the price are listed for every negotiation of weight.	
09	Each topic has a value in EUR per year for the own side and an estimate for the other side.	
10	Two or more packages are compared in one sheet before the talk, each with its equivalent price.	

THE CHECK

03 Leading the Talk

NO.	CHECK	SCORE 0 TO 4
11	The opening value is decided beforehand, backed by evidence and stated first or second by a deliberate choice.	
12	A list of open questions is prepared, and the answers are noted and compared with the assumed interests.	
13	Every concession is given against something in return and written into a log during the talk.	
14	Breaks are planned and used before any decision that goes beyond the prepared packages.	
15	In a team, lead, expert and note taker are named, and the mandate and the person behind it are agreed in writing.	

04 Difficult Situations and Fair Play

NO.	CHECK	SCORE 0 TO 4
16	A price increase demand is answered with a request for the cost drivers and checked against indexes before any talk about a number.	
17	For every sole source there is a written plan of how dependency is reduced over the next 24 months.	
18	Pressure tactics are known by name in the team, and a calm standard response exists for each.	
19	An escalation path with levels and time limits exists for both sides and is used before a relationship is damaged.	
20	Contract wording, competition law and compliance questions are check points with a named owner, not decided at the table.	

THE CHECK

05 Close, Follow Up and Learn

NO.	CHECK	SCORE 0 TO 4
21	The result is confirmed in writing to the other side within two working days, point by point with dates and owners.	
22	Each agreed point has an implementation check with a due date, and invoices are checked against the agreed price.	
23	A review is held within two weeks and compares target, limit and result in EUR.	
24	All negotiations above the threshold are kept in one register with result and target attainment.	
25	Key figures from the register are reviewed twice a year, and the preparation sheet is changed by what they show.	

Your Result

BLOCK	POINTS	OUT OF
01 Interests, Alternative and Limits		20
02 Power and Package		20
03 Leading the Talk		20
04 Difficult Situations and Fair Play		20
05 Close, Follow Up and Learn		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your negotiating is method. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Improvised. Talks start without a written limit.	Write the alternative, the target and the limit for your next negotiation.
40 to 59	Price focused. Limits exist, but talks are about one number.	List four topics beside the price and value them in EUR.
60 to 79	Prepared. Packages and a log are used, follow-up varies.	Confirm every result in writing, check the invoices, start the register.
80 to 100	Systematic. Preparation, talk, record and review follow one method.	Hold the level. Use the register to train the next negotiators.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after six months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
NEGOTIATION STARTER KIT	The guide for your next negotiation in three weeks, plus the preparation sheet in Excel with zone calculator, trade values and concession log.
NEGOTIATION EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, six templates, the Excel system with package comparison and register, and a workshop deck. Both at operationsinsider.com.