



## **Interest-Based Bargaining Leadership Toolkit**

Practical worksheets to support negotiation, trust, and transformation

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Book: *Bridge the Gap: A Leader's Guide to Negotiation, Trust, and Transformation*

# Interest-Based Bargaining (IBB) Preparation Sheet

## Purpose:

Use this worksheet to prepare for negotiations that prioritize trust, clarity, and sustainable outcomes.

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## A. Negotiation Context

- Organization / Department:
- Issue or Topic Being Negotiated:
- Date:
- Participants / Stakeholders:

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## B. Shared Purpose

Why is this conversation happening *now*?

- What problem needs to be addressed?
- What happens if this issue is not resolved?
- What does success look like for *both* sides?

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## C. Your Interests (Not Positions)

What do you actually need, protect, or value?

- Operational needs:
- Financial or resource constraints:
- Relational concerns:
- Long-term priorities:

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## D. Other Party's Likely Interests

What might *they* care about beneath their stated demands?

- Pressures they may be facing:

- Risks they are trying to avoid:
- Outcomes they need to show internally:

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## **E. Objective Criteria**

What facts, data, or standards can ground the conversation?

- Policies or contracts:
- Budget realities:
- Past practice:
- Industry benchmarks:

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## **F. Initial Options for Mutual Gain**

Brainstorm without judging feasibility yet.

- 1.
- 2.
- 3.
- 4.

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## **G. Notes / Observations**

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# Stakeholder Interest Mapping Worksheet

## Purpose:

Identify all affected parties and understand their interests before conflict escalates.

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## Stakeholder Map

### Stakeholder Role / Influence Primary Interests Risks if Ignored

(Add rows as needed)

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## Key Questions

- Who has formal authority?
- Who has informal influence?
- Who must feel heard for implementation to succeed?
- Where are interests aligned?
- Where are tensions likely to surface?

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## Leadership Insight

Which relationships require diplomacy *before* negotiation?

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# Meeting Purpose and Agenda Template

## Purpose:

Create clarity, reduce defensiveness, and keep negotiations focused.

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## Meeting Overview

- Meeting Title:
- Date / Time:
- Participants:
- Facilitator:

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## Purpose Statement

(This should be clear, neutral, and shared in advance.)

The purpose of this meeting is to \_\_\_\_\_  
with the goal of \_\_\_\_\_.

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## Agenda

1. Opening and shared context
2. Review of purpose and expectations
3. Identification of interests
4. Discussion of options
5. Next steps and responsibilities

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## Ground Rules

- Respectful dialogue
- Focus on issues, not individuals
- Use facts and shared data
- Allow space for listening

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# Negotiation Outcome Documentation Template

## Purpose:

Ensure clarity, accountability, and trust after agreement.

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## Agreement Summary

- Issue Addressed:
- Date of Agreement:
- Parties Involved:

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## Key Agreements

- 1.
- 2.
- 3.
- 4.

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## Responsibilities

### Action Item Responsible Party Deadline

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## Monitoring Plan

- How progress will be reviewed:
- Review dates:
- Metrics or indicators:

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## Notes / Clarifications

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# Post-Negotiation Evaluation Checklist

## Purpose:

Reflect, learn, and improve future negotiations.

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## Outcome Review

- Was the core issue resolved?
- Were interests addressed?
- Was the process perceived as fair?

Yes  Partially  No

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## Relationship Impact

- Trust improved
- Trust unchanged
- Trust damaged

Why?

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## Process Reflection

- What worked well?
- Where did tension arise?
- What would you do differently next time?

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## Leadership Takeaway

What did this negotiation reveal about:

- Culture?
- Communication?
- Leadership alignment?