



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.

A. Negotiation Context

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

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?
-

C. Your Interests (Not Positions)

What do you actually need, protect, or value?

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

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:
-

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.
-

G. Notes / Observations

Stakeholder Interest Mapping Worksheet

Purpose:

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

Stakeholder Map

Stakeholder Role / Influence Primary Interests Risks if Ignored

(Add rows as needed)

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?

Meeting Purpose and Agenda Template

Purpose:

Create clarity, reduce defensiveness, and keep negotiations focused.

Meeting Overview

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

Purpose Statement

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

The purpose of this meeting is to _____
with the goal of _____.

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
-

Negotiation Outcome Documentation Template

Purpose:

Ensure clarity, accountability, and trust after agreement.

Agreement Summary

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

Key Agreements

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

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

Post-Negotiation Evaluation Checklist

Purpose:

Reflect, learn, and improve future negotiations.

Outcome Review

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

☐ Yes ☐ Partially ☐ No

Relationship Impact

- Trust improved ☐
- Trust unchanged ☐
- Trust damaged ☐

Why?

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?