**Prepare to Negotiate Worksheet**

**Name: Date:**

**Directions:** Use this worksheet as a template to prepare for negotiation. The checklist at the end can help in identifying any needed documents and resources to support the negotiation.

The *Needs Assessment Worksheet* from Module 1 and *Financial Assets Inventory Worksheet* from Module 2 are helpful to refer to as you fill this out.

**Part 1: What are you negotiating for?**

1. What are the assets you will negotiate for? Be specific. (Review *Asset Inventory Worksheet)*
2. What are your needs? (Review *Needs Assessment Worksheet*)

1. Prioritize your needs. Be specific and consider the following:
   * What is an ideal outcome? (Review *SMART Goals* worksheet to identify an outcome tied to the negotiation.)
   * If you can’t get everything you want, what is an acceptable outcome? (Review *Needs Assessment* Worksheet)

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| --- | --- | --- |
| **Non-Negotiables Needs**  (Need these) | **Negotiable Needs**  (Would like these) | **Very Negotiable Needs**  (Could get by without these) |
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**Part 2: Who is involved in the negotiation?**

1. Who will you negotiate with?
   * Name(s):
2. What is their role(s) in the transfer? Are they a decision maker?
3. What are their goals? What are their needs? (Review *Needs Assessment Worksheet*)
   * If you don’t know their goals and needs, how will you find out?
4. What do you know about their personality, cultural norms, or values? (Review *Values* Information Sheet)
5. Are there any barriers such as bias or differences in communication styles? If so, how will you address them? (Review *Communication Styles* Information Sheet).

* Yes \_\_\_ No \_\_\_\_

1. What is a common outcome you wish to achieve?

**Part 3: When, where and how might you plan to negotiate?**

1. Who will initiate the negotiation? Who will schedule it?
2. Where will it take place? What do you know about the facilities?
3. How will decisions be made?

* Consultative (Whole group discusses, One person decides)
* Democratic (Whole group discusses; Decision is make when some percentage agrees.)
* Consensus (Whole group discusses; Decisions is made when each member agrees.)
* Delegative (One person makes decisions for the whole group; One person decides.)

1. Do you need a trusted third-party? This could be a professional such as a mediator or attorney, or another team member you would like to invite.

If yes, who are they and how will you ensure all parties agree to have them present?

1. What is your budget for the transfer of assets? How much can you afford to spend? How much do you need to raise? (Review *Budget Worksheet*)
2. When do you need a decision to be made? Build a timeline back from that date. List the events that need to happen, making note that you may need more than one conversation. Use another page if you run out of space here.

*Example:*

*In 2 weeks*

Decision made by \_\_\_\_

*Example:*

*Ask\_\_\_ about their goals.*

**Part 4: What supporting documents do you need?** Gather information and other useful resources to bring with you. Check the boxes next to items you need to collect that support what you are negotiating for:

* Business plan
* Vision statement and supporting images
* Financial documentation
* Cost estimates of transfer
* Real estate and tax value assessments
* Family/ Farm/ Land history
* Wills or inheritance plan
* Maps of Farm or Ranch such as land surveys, county maps of land and property, soil maps
* (If appropriate) Draft a simple agenda. Share it with attendees ahead of time.
* List any other information to bring.