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SPECIAL TACTICS TO NEGOTIATE EFFECTIVELY BY PHONE

You have a telephone appointment with your counterpart in a big negotiation at 2 pm. It's going to be a critical conversation as you received your counterpart's extremely aggressive first offer last week, and you have not yet responded.

If you come across as too competitive, your counterpart might just walk away. But if you don't appear strong and appropriately aggressive, he might think he can walk all over you.

What tactics can you use in phone negotiations like these to increase your likelihood of achieving your goals?

(By the way, the following applies to telephone appointments or calls you initiate. It's almost always harmful to engage in a significant negotiation if your counterpart unexpectedly calls and you're not prepared. In those circumstances, tell them you'll call them back and then do the following.)

1. Strategically – and comprehensively – prepare.

Don't give this conversation short shrift just because it's over the phone and not face-to-face. Many view face-to-face negotiations as requiring more strategic preparation than phone negotiations.

This can be a huge mistake. The signals you send over the phone can make or break your negotiation. Your counterpart will be carefully evaluating and analyzing your words, pace, tone and inflection – and you should be doing the same for theirs.

Remember this – negotiation experts suggest you spend at least twice as much time preparing for your negotiation as doing it. This applies to face-to-face meetings *and* phone negotiations.

2. Set a goal and design a strategy for each conversation.

Treat each significant phone conversation as an opportunity to move your negotiation forward and set a goal and design a strategy for each phone contact. Draft a strategic plan of what you want to accomplish and how you want to accomplish it in that call. It may be just a few short notes, but give each phone contact some strategic thought.

For instance, if it's early in the negotiation, perhaps view the call as an information gathering opportunity and write down a list of information you want or questions to ask. Consider also how to respond if your counterpart asks you certain questions.

If it's later in the process, consider making an offer in the conversation and perhaps write down specific language to use.

And in almost all your conversations, think about how to control the agenda. Perhaps send your counterpart an email before your telephone appointment listing the issues you want to discuss (and know that the order of the issues in your email makes a difference as we tend to address issues sequentially).

3. Take detailed notes, especially of commitments.

Take advantage of the phone environment to take detailed notes of the significant words, phrases, tone and other strategic messages sent and received. Especially document commitments made by you and/or your counterpart.

In fact, consider drafting an email shortly after your conversation to confirm those commitments in writing. And make sure to note that your counterpart should let you know if your email does not accurately reflect their understanding of those commitments. You don't want ambiguous commitments or misunderstandings.

Of course, don't be so focused on taking notes that you don't pay close attention to the conversation. Some might be better off taking time immediately *after* the conversation to jot down their notes.

4. Actively listen and interact – don't multi-task.

Finally, it's so easy these days to multi-task while on the phone, whether it's checking or responding to email, reviewing your to-do list, or even going through your mail. Since this is a significant phone conversation, resist the urge. Sophisticated negotiators can sense this relative lack of attention on the phone, and this will likely set your negotiation back.

Plus, I have yet to meet a person who can actively listen, strategically consider the huge number of possible moves and countermoves during a significant negotiation, interact at appropriate times, and - at the same time - engage in an unrelated activity.

The vast majority of us simply can't do it. And we shouldn't try. It's just not worth the potential time-saved.

The phone environment presents unique opportunities for negotiators – and unique dangers. The keys? Prepare. Set your goal and strategy. Keep track of commitments. And don't multi-task.

Then pick up the phone and engage.

**Marty Latz is the founder of Latz Negotiation Institute, a national negotiation training and consulting company, and ExpertNegotiator Planning & Management Software, a web-based software company that helps individuals more effectively negotiate based on the experts' research of what works. ExpertNegotiator also helps companies create and implement negotiation best practices (www.ExpertNegotiator.com). He is the author of "Gain the Edge! Negotiating to Get What You Want" and can be reached at 480.951.3222 or Latz@NegotiationInstitute.com.*