RS-T06 / WORKSHEET

Negotiation Prep Worksheet

Walk into the negotiation knowing your limits, their pressures, and what you will trade.

BUILT FOR
Sellers, Sales Managers

STAGE
Improve

YOU LEAVE WITH
A one-page negotiation plan

INSIDE

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01 UNDERSTAND

Most negotiations are lost in preparation.

When a seller walks in without a walk-away point or a list of tradeable terms, the only lever left is price. This worksheet helps you plan the conversation so concessions are deliberate, small, and always exchanged for something.

THE PROBLEM

Discounts are given early and for nothing, deals close later anyway, and margin disappears.

WHO IT'S FOR

Sellers heading into commercial conversations, and managers preparing deals with them.

WHEN TO USE IT

Once a buyer has chosen you and terms are on the table, or before any pricing or contract discussion.

Four principles we use

PRINCIPLE	WHAT IT MEANS IN PRACTICE
Know your alternative	Your strength comes from what you will do if there is no deal. Know it before they ask.
Trade, never give	Every concession is exchanged for something of value: timing, term, scope, a reference, a faster signature.
Concede small and slow	Each move is smaller than the last and comes with a reason. Big early moves signal there is more.
Value before price	Re-anchor on the problem and impact the buyer confirmed. Price talks go better when value is fresh.

How to use this worksheet

1. **Set your position:** target, walk-away point, and alternatives.
2. **Map their side:** who is involved, what they need, and their alternatives.
3. **Plan the trades:** list the terms you can move and what you want back for each.
4. **Prepare the key moments:** how you open, respond to pressure, and ask for commitment.

Your position, and theirs.

Write these down before the conversation. Under pressure, numbers you have not written tend to move.

Your position

	YOUR ANSWER
Target outcome Price, term, scope, start date	
Walk-away point The point where you would rather not do the deal	
Your alternative if no deal What you will do instead	
Value the buyer confirmed Problem and impact, in their words	
Approvals you need Who must sign off on non-standard terms	

Their side

PERSON	ROLE IN DECISION	WHAT THEY CARE ABOUT	PRESSURE THEY'RE UNDER	LIKELY ASKS

	YOUR BEST READ
Their alternative if no deal Competitor, build it, or do nothing	
Their deadline What happens if this slips	

Plan the trades.

List every term that could move. Then decide, before the meeting, what you would want back for each one.

Tradeable terms

Rate each term L, M, or H: what it costs you, and what it is worth to them. The best trades cost you little and matter a lot to them.

TERM	COST TO US	VALUE TO THEM	WHAT WE'D WANT IN RETURN
Price or discount			
Contract length			
Payment terms			
Start date or ramp			
Scope or seats			
Onboarding or support			
Case study or reference			
Signature date			

Concession plan

Plan up to three moves. Each one smaller than the last, each one traded.

MOVE	WHAT WE OFFER	WHAT WE ASK FOR	REASON WE GIVE
1			
2			
3			

> **EXAMPLE**
>
> A seller at a B2B SaaS company, buyer asks for 20% off. Move 1: 5% for a two-year term. Move 2: 3% more for signature by month end. Move 3: an extra onboarding session, not more discount, in exchange for a case study after launch.

Prepare the key moments.

Plan your words for the three moments that decide most negotiations. Say them out loud before the meeting.

MOMENT	APPROACH	SOUNDS LIKE
Opening	Restate the value and the agreed outcome before discussing terms.	"Before we get into terms, let's make sure we agree on what this needs to solve and by when."
"The price is too high"	Ask what it is compared with. Pause. Then re-anchor on value, not on discount.	"Too high compared with what? ... Let's go back to the cost of the problem you described."
A request for a concession	Never answer with a yes. Answer with a condition.	"If we could look at that, would you be able to sign by the 30th?"
Asking for commitment	Summarize what is agreed and ask directly.	"With these terms, is there anything stopping us from signing this week?"

Your lines

How we will open

Our response to "the price is too high"

Our commitment question

03 LEARN

A worked example, and what to avoid.

> **EXAMPLE**
>
> A seller at a B2B SaaS company in the final stage of a deal. Procurement asked for 20% off and 60-day payment terms. The seller had a walk-away point, approval for up to 8%, and a trade list. They asked what the 20% was compared with, re-anchored on the problem the economic buyer had confirmed, offered 5% for a two-year term, then 3% more for signature by month end.
>
> **Result:** 8% instead of 20%, a two-year term, and standard payment terms.

Common mistakes

- **Conceding before being asked.** Offering a discount up front invites a request for more.
- **Negotiating with someone who cannot sign.** Confirm who has authority before trading.
- **Forgetting non-price terms.** Term, timing, and scope are often worth more than price.

04 EVALUATE

Check your work.

- [ ] Target and walk-away points are written down.
- [ ] You know your alternative, and your best read of theirs.
- [ ] Every planned concession has something attached in return.
- [ ] Moves get smaller each time.
- [ ] Approvals for non-standard terms are in hand.
- [ ] You have practiced your response to price pressure.

05 GO FURTHER

COACHING & ADVISORY

Want to work through this on a live deal?

Through Coaching & Advisory we prepare live negotiations with you or your team, role-play the hard moments, and review how they went afterwards.

Book a strategy call: cal.com/revseries/strategy-call

Prefer email? advisor@revseriesadvisory.com