

Purpose

This document lists all of the negotiations-related documents available in Corium Consulting Services' Negotiations Toolkit.

Toolkit Contents

Document	Description	Purpose	Audience	Format
Copyright Information	The copyright information and licence to use Corium Consulting Services Negotiations Toolkit	<ul style="list-style-type: none"> To provide information regarding the permitted use of the Negotiations Toolkit Persons in possession of the Toolkit and not agreeing to its terms of use may not use the Toolkit 	<ul style="list-style-type: none"> All persons in possession of or considering acquiring the Toolkit 	PDF
List of Documents	This document. The list of documents included in the Negotiations Toolkit	<ul style="list-style-type: none"> To list the documents included in the Negotiations Toolkit and covered by the Copyright Information 	<ul style="list-style-type: none"> All persons in possession of or considering acquiring the Toolkit 	PDF
Negotiations Process	Overview presentation of the process of negotiations including interaction with other negotiation process elements	<ul style="list-style-type: none"> Overview of the negotiations process including interaction with other negotiation process elements 	<ul style="list-style-type: none"> Anyone 	PowerPoint
Interest-Based Negotiations (IBN) Overview	Generic overview presentation of interest based negotiations concepts, tools and techniques.	<ul style="list-style-type: none"> Familiarization with IBN Training of IBN tools and techniques Development of solution to 1 negotiating issue using IBN (only if negotiations teams and Steering Committees are part of the audience) 	<ul style="list-style-type: none"> Internal Executive Steering Committee Joint Executive Steering Committee Negotiations Team (Master Agreement & Schedules) Due Diligence Team Other parties interested in IBN concepts 	PowerPoint
Negotiations Kick-Off (Internal)	Overview presentation of the negotiations elements (process, roles and responsibilities, general and detail schedule options, documents, logistics)	<ul style="list-style-type: none"> Familiarization of internal negotiations team with elements of negotiations Decision making for internal negotiations teams regarding preferred scheduling of negotiations Development of initial internal key negotiating issues 	<ul style="list-style-type: none"> Internal Negotiations Teams (Master Agreement & Schedules) Internal Executive Steering Committee (summary only) 	PowerPoint
Diagrams for Kick-off Presentations	Visio diagrams used in the kick-off presentations	<ul style="list-style-type: none"> Used for kick-off presentations and other negotiations related presentations 	<ul style="list-style-type: none"> Same as kick-off presentations 	Visio

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Negotiations Kick-Off (Joint)	Overview presentation of the negotiations elements including the recommended/desired general and detail schedule	<ul style="list-style-type: none"> Familiarization of joint negotiations team with elements of negotiations Final decision making for joint negotiations teams regarding scheduling of negotiations Development of initial joint key negotiating issues 	<ul style="list-style-type: none"> Joint Negotiations Teams (Master Agreement & Schedules) Joint Executive Steering Committee (summary only) 	PowerPoint
Negotiations Roles and Responsibilities	Overview of the recommended roles and responsibilities within the negotiations stage, including organizational structure	<ul style="list-style-type: none"> Description of each of the roles involved in negotiations Indication of when and which roles can be combined and held by one individual and when and which roles should be kept separate 	<ul style="list-style-type: none"> Internal negotiations teams (Master Agreement and Schedules) Joint negotiations teams (Master Agreement and Schedules) Internal Executive Steering Committed Joint Executive Steering Committee 	Word
Negotiations Logistics	Checklist of logistics requirements for negotiations (rooms, meals, AV, network access, repository, facilities access, etc.), including recommended structure for the negotiations data repository	<ul style="list-style-type: none"> Checklist for logistics coordinator 	<ul style="list-style-type: none"> Negotiations logistics coordinator 	Word
Contract Structure	Standard structure for the agreement for	<ul style="list-style-type: none"> Master/schedule structure Recommended/sample table of contents of the master agreement Recommended/sample table of contents of the schedules and appendices to the master agreement 	<ul style="list-style-type: none"> Steering Committees (Internal and Joint) Negotiations Teams (Internal, Joint, Master and Schedules) Legal Counsels 	Word

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Standard/Initial Issues List	Listing of the standard issues involved in the negotiations including standard positions/interests and likely outcomes. This list will be modified (items deleted, added, modified) by the negotiations teams during development of the PTR/BATNA document. <u>Highly confidential internal document</u>	<ul style="list-style-type: none"> Provide the internal negotiations team with an initial list of issues, interests, range of alternatives, and likely outcomes 	<ul style="list-style-type: none"> Internal negotiations teams (Master Agreement and Schedules) Internal Executive Steering Committee (reference only) 	Word
Issues PTR/BATNA Template	List of all of the negotiating issues with questions to be answered as well the internal teams' interests and an assessment of the range of acceptable outcomes (preferred (like to achieve), tolerable (acceptable if achieved), required (must have or not acceptable)) <u>Once completed this is a highly confidential internal document</u>	<ul style="list-style-type: none"> List all of the issues to be negotiated List of range of acceptable alternatives (and/or positions) for each issue 	<ul style="list-style-type: none"> Internal Negotiations Teams (Master and Schedules) Internal Executive Steering Committee (key issues only) 	Word
Negotiating Strategy Template	Description of how the internal negotiations teams will approach negotiations; indication of critical issues, issues which can be traded, etc. <u>Once completed this is a highly confidential internal document</u>	<ul style="list-style-type: none"> High level roadmap to negotiations for the internal negotiations team Communications vehicle for the internal Executive Steering Committee 	<ul style="list-style-type: none"> Internal Negotiations Teams (Master & Schedules) Internal Executive Steering Committee 	Word
Negotiations Log Template	A list of all of the issues negotiated, including interests, and the proceedings from each negotiating session including final resolution, action items, etc.	<ul style="list-style-type: none"> List of approval stakeholders and impacted stakeholders List of the issues including questions to be answered and interests of each party Log of the proceedings from each of the negotiating sessions, including final agreement Source document from which legal counsel develops the agreement Audit and other after-the-fact reference document 	<ul style="list-style-type: none"> Negotiating Teams Legal Counsel After-the-Fact Auditor 	Word

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Negotiations Schedule Template	A list of all of the issues negotiated with estimated and actual negotiating times, scheduled and actual negotiating dates. Includes summary status and statistics	<ul style="list-style-type: none"> Schedule of all issues to be negotiated including next date on which each issue will be negotiated Planning tool for scheduling negotiating days, negotiating resources, and proposals for any negotiating issues 	<ul style="list-style-type: none"> Negotiations Teams Internal Steering Committee (summary information only) Joint Steering Committee (summary information only) 	Excel
Negotiations Proposal Template	Template for exchanging specific proposals for specific negotiating issues	<ul style="list-style-type: none"> Documenting specific proposals (initial and/or revised) in regard to specific issues Frequently embedded in Negotiations Log 	<ul style="list-style-type: none"> Negotiations teams (Master and Schedules) (internal and joint) 	Word
Steering Committee Status Report	Template for the regular status report	<ul style="list-style-type: none"> Dashboard of status of negotiations Negotiations schedule Key outstanding issues Key agreements 	<ul style="list-style-type: none"> Internal Steering Committee Joint Steering Committee 	Word
Closing and Post-Closing Agenda	Checklist of items to be done at/for the closing/signing day of the agreement and the immediate post-closing period.	<ul style="list-style-type: none"> Checklist of items to be prepared/available at/for contract signing Checklist of items to be prepared/available in the period immediately following contract signing 	<ul style="list-style-type: none"> Legal Counsel Initiative's Project Management Negotiations Teams (Master and Schedules) (internal and joint) Joint Executive Steering Committee (reference only) 	Word
Lessons Learned	List of lessons learned from other negotiations	<ul style="list-style-type: none"> Lessons that have been learned through various negotiations to help participants of negotiations avoid mistakes. 	<ul style="list-style-type: none"> Internal and Joint Steering Committee Internal and Joint Negotiations Team 	Word