Give/get preparation

Prepare each concession as a deliberate agreement.

Understand the interest behind the request first. Prepare specific, mutual commitments. Confirm internal approval limits before the conversation.

COMPLETED EXAMPLE - FICTIONAL

Customer interest: a reliable rollout. Give: two additional admin training sessions. Get: named admin team, committed attendance and agreed rollout date. Internal approval: pending, Sales Lead reviews by 25 Sep. No commitment to the customer yet.

Account / negotiation date / participants

Customer request / underlying interest / how confirmed?

Goal / minimum conditions / approved flexibility / approved by

1 Prepare exchange options

Give: scope + internal effort	Get: specific commitment in return	Condition + approval status

Give/get preparation

Continue the worksheet. Separate facts, assumptions and commitments.

Additional option / alternative if no agreement is reached

2 Draft a conditional offer

If you commit to ... , we can offer ... under these conditions:

Who can commit on each side? Which approval is still outstanding?

3 Record the outcome

Agreed give / get / scope	Condition / valid until	Confirmed by / date

Next action / owner / due date / update to the shared plan

COMPLETION CHECK

- [ ] The interest behind the request is understood.
- [ ] The give is within confirmed approval limits.
- [ ] The get is specific and the customer can commit to it.
- [ ] Conditions are documented transparently.
- [ ] The next step and owners are agreed.