

The Procurement Negotiation Checklist

What to know and what to do at every phase of a supplier negotiation, from a single page you can run through before, during, and after every deal.

HOW TO USE THIS CHECKLIST

The map for every supplier negotiation

This checklist is the what of supplier negotiation: the concrete moves that separate a strong deal from an average one, laid out across the five phases every negotiation moves through. It is built for procurement directors and their teams, and every item is drawn from our Negotiation Course for procurement professionals.

It works as a practical reference you can hand out to your team and return to throughout the negotiation process. Use it as a tool to prepare, guide, and strengthen your supplier negotiations.

The checklist tells you what to do at each phase. The full method behind it, the frameworks, the worked examples, and the AI-assisted preparation, lives in our [**Negotiation Course for Procurement Professionals**](#). Think of this page as the map, and the course as the training that teaches you to read it well.

A quick note on the structure: the five phases draw on the five modules of the course. Foundations and preparation feed Prepare, the opening feeds Open, analysis and influence feed both Explore and Analyze and Bargain, and deal closing feeds Close.

Run through it before, during, and after every deal

- Work through **PREPARE** before you walk in.
- Keep **OPEN, EXPLORE AND ANALYZE**, and **BARGAIN** beside you during the conversation.
- Use **CLOSE** to lock the deal in.

After a handful of negotiations, the moves become a habit.

THE PROCUREMENT NEGOTIATION CHECKLIST

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GOAL

Walk in calm, clear, and in control: know what kind of negotiation this is, and know exactly what a good deal looks like before anyone sits down.

WHAT YOU SHOULD KNOW

- **The Dynamic Negotiation Framework:** Two questions (how much do you depend on each other, and how many variables are on the table) place every deal in one of four quadrants: the One-Shot, the Puzzle, the Pressure Zone, and the Alliance. Each quadrant asks for a different style and different tactics.
- **Principled Negotiation (Fisher and Ury):** separate the people from the problem, focus on interests not positions, invent options for mutual gain, and insist on objective criteria.
- **The hidden forces** that bend the framework: power, time, trust, culture, and the environment. Diagnose the dominant one first.
- **BATNA** (your Best Alternative To a Negotiated Agreement), your reservation price, and your ZOPA (Zone of Possible Agreement). Plus like, intent, and breakpoint per variable, your carrots and sticks, and the five negotiation styles (competitive, accommodating, avoiding, compromising, collaborative).

WHAT YOU SHOULD DO

- ☐ Diagnose your quadrant: rate how much you and the supplier depend on each other, and count the variables really on the table.
- ☐ Identify which hidden force (power, time, trust, or culture) most shapes this deal, and plan for it.
- ☐ Align your negotiation goals with your company strategy, your procurement team plan, and your own portfolio plan.
- ☐ Research the other party first: their objectives, pressures, and the arguments they are likely to raise.
- ☐ Map the power balance: your share of the supplier's sales, and their share of your spend.
- ☐ Find and develop your BATNA: line up a credible alternative supplier before the first meeting.
- ☐ Rank every variable by importance to you, then by importance to the supplier.
- ☐ Set your like, intent, and breakpoint (reservation price) per variable, and identify your ZOPA.
- ☐ Prepare your carrots and sticks, plus an escalation plan for when and how to use them.
- ☐ Decide your own style, predict the supplier's, and plan how to counter it.
- ☐ Align internal stakeholders (Finance, Legal, end users, and your manager) on your like, intent, and breakpoint.
- ☐ Use AI to speed up preparation, but verify its output and never paste confidential data.

GOAL

Take control of the first minutes and set an anchor that quietly pulls the whole deal your way, before anyone argues about a single number.

WHAT YOU SHOULD KNOW

- **The first minute does four jobs:** introductions, agenda, process, and atmosphere. Remember the rule: procurement leads, sales follows; procurement asks, sales answers. Match your opening tone to your quadrant.
- **Anchoring (Kahneman and Tversky):** the first number on the table pulls everything toward it. An anchor without a story is just a number, so back it with your three strongest arguments and objective criteria.
- **Who makes the first offer** depends on information. If you know the market, go first and anchor. If you do not, draw the other side out.
- **Framing (prospect theory):** the same offer can land as a gain or a loss, and people feel a loss about twice as heavily as the same-sized gain. Choose the words and the reference point that help your case.

WHAT YOU SHOULD DO

- ☐ Open with a warm, professional greeting, then set the agenda, the process (time, who decides, follow-up), and the atmosphere before any number lands.
- ☐ Match your opening tone to your quadrant: brisk in a One-Shot, collaborative but leveraged in a Puzzle, respectful and continuity-focused in a Pressure Zone, warm and partnership-focused in an Alliance.
- ☐ Decide whether to make the first offer: go first if you know the market, draw them out if you do not.
- ☐ If you anchor, place a credible number and attach your three strongest arguments, each backed by objective criteria.
- ☐ Stay calm if they anchor first: do not argue from their number, re-anchor with your own and your reasons.
- ☐ Frame every key ask as a gain, not a loss, using a reference point that strengthens your position.
- ☐ Rehearse your opening out loud (AI works well as a sparring partner) before the meeting.

EXPLORE & ANALYZE

GOAL

Hear what the supplier really means, not just what they say, and influence them with care instead of force.

WHAT YOU SHOULD KNOW

- **The Iceberg model.** A position is what someone says they want; an interest is why they want it. One position usually sits on several interests. Split interests into must-haves (protect) and nice-to-haves (trade).
- **Five sources of power:** your knowledge, the quality of the counterpart's skills, the competition in the market, time constraints, and the importance of the deal to each side. Your mix shifts by quadrant, so map the balance before you push.
- **The 5 Whys (Taiichi Ohno, Toyota):** ask why up to five times to reach the real driver. Soften it so it feels like curiosity, not an interrogation.
- **Active listening on three levels (Carl Rogers):** internal, focused, and global. Aim for focused and global, and treat the pause before an answer as a signal. Pair it with tactical empathy (Chris Voss): labeling ("it sounds like..."), mirroring, and the accusation audit, aiming for "that's right," not "you're right."

WHAT YOU SHOULD DO

- ☐ For every demand, write the stated position and the interest you suspect underneath, then ask a question to test it.
- ☐ Use the 5 Whys to dig from a surface demand to the real need, softened with "help me understand what is behind that."
- ☐ Listen on the focused and global levels, and read the quiet pause as closely as the words.
- ☐ Use labeling and mirroring to surface the supplier's real priorities, aiming to hear "that's right" before you push.
- ☐ Diagnose which of the five power sources you actually hold in this quadrant, then lean on those.
- ☐ Prepare one accusation audit — say the supplier's likely objection out loud before they do — to take the sting out of it.
- ☐ Separate their must-have interests from their nice-to-haves, so you know what to protect and what to trade.

GOAL

Trade your way to a strong deal while staying calm under pressure, and never give something away for free.

WHAT YOU SHOULD KNOW

- **The YES ladder.** Build a big agreement from a series of small, fair yeses (Cialdini's commitment and consistency). **LAER** handles objections: Listen, Acknowledge, Explore, Respond. Acknowledge the point, then get creative with the solution.
- **Ten common negotiation tactics from the course (of 50+):** the journalist trick, postpone, bluffing, the broken record, deadlines, playing dumb, silence, the hypothetical question, salami, and all-or-nothing. Expect different tactics in different quadrants, and know how to counter each.
- **The golden rule of concessions:** never give without getting. Every concession comes with an "if." Keep proposals specific and conditional, table no more than three items at once, and keep a record of every move with the move planner.
- **Mehrabian's 7-38-55 rule:** when words and body disagree, believe the tone and body. Watch for the mismatch, read clusters and changes against a baseline. And know when to walk away: a real walk-away, backed by your BATNA, is one of your most powerful moves.

WHAT YOU SHOULD DO

- ☐ Build a YES ladder: break the deal into small, fair, winnable agreements before you reach the number.
- ☐ Handle every objection with LAER: acknowledge the point, then solve it creatively together.
- ☐ Trade every concession as "if I give this, then I get that," and never give for free.
- ☐ Keep proposals specific and conditional, table no more than three at once, and record every move.
- ☐ Name the supplier tactic you are facing and counter it calmly; never decide under pressure.
- ☐ Watch the mismatch between words and body: read clusters and changes, not single gestures.
- ☐ Project calm: sit up, hold steady eye contact, slow your voice, and let silence do the work.
- ☐ Know your walk-away point before you sit down; if you walk, keep it a pause and leave the door open.
- ☐ Slow down and pause whenever the pressure rises: it is the cheapest fix for almost every mistake.

GOAL

Lock in exactly what you agreed, clearly, out loud, and in writing, so nothing drifts after everyone leaves the room.

WHAT YOU SHOULD KNOW

- **Closing signals.** The language shifts from "if" to "when," they ask about next steps, and they relax. When you see the signals, stop selling; talking past the yes can talk you back out of the deal.
- **The verbal summary.** Say the deal back out loud covering what, why, when, and by whom, restate every concession you won, then ask "have I captured that correctly?" to catch a mismatch while it is still cheap.
- **The trial close:** a gentle question that tests readiness without forcing a final commitment. Before you close, check the person in front of you can actually say yes.
- **The follow-up email.** Whoever writes the summary controls the record, so write it yourself, send it the same day, keep it warm and specific, and ask them to confirm. The email aligns memories; the contract makes it binding.

WHAT YOU SHOULD DO

- ☐ Watch for verbal and non-verbal closing signals, and stop persuading the moment they appear.
- ☐ Confirm the person in front of you can sign off; if not, get the real decision-maker in.
- ☐ Use a trial close to test readiness ("if we can agree on this, are we good to go?").
- ☐ If you get a "not yet," ask what is holding them back and agree a concrete next step with a date.
- ☐ Say the deal back out loud: what, why, when, and by whom, and restate every concession you won.
- ☐ Ask "have I captured that correctly?" to surface and fix mismatches on the spot.
- ☐ Write the follow-up email yourself and send it the same day, ideally within the hour.
- ☐ Put each agreed point, action, and date on its own line, and ask them to confirm it matches their understanding.
- ☐ Stay sharp to the very end: spot any last-minute nibble and trade for it rather than waving it through.

YOUR NEXT STEP

The checklist shows you **what** to do. The course teaches you **how** to do it well.

You have just seen the moves that make up a strong supplier negotiation. The Negotiation Course for procurement professionals is where you learn the full method behind them, with the frameworks in depth, the templates, and worked examples from real 500-million-dollar deals.

- ✓ The Dynamic Negotiation Framework and all four quadrants, in depth
- ✓ The complete preparation routine, with fillable templates for every step
- ✓ The complete preparation routine, with fillable templates for every step
- ✓ AI-assisted preparation, rehearsal, and debriefs you can use on your next deal

[See what is inside the Negotiation Course](#)

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