

## Lessons from the Field: First Impressions from Second Generation Negotiation Teaching

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*Editors' Note: The authors, invited to present a training program in one day which drew from the insights of forty-three writers in thirty book chapters and articles resulting from the first year of this project, not surprisingly concluded they would not all fit(!) Their choice of priorities and their approach to efficiency of presentation should be instructive to others who must now contemplate the "embarrassment of riches" of new ideas now on offer.*

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"The only source of knowledge is experience."  
(Albert Einstein)

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### Introduction

The Rethinking Negotiation Teaching project (NT 2.0 project) has two primary goals: to significantly advance our *understanding* of the

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negotiation process in all its complexity; and to improve how we *teach others* about negotiation. The first year of this four-year project focused on generating new ideas and approaches to negotiation scholarship and teaching. Some of this scholarship was published in the book *Rethinking Negotiation Teaching* (Honeyman, Coben, and De Palo 2009) and some in *Negotiation Journal*.<sup>1</sup> These articles call on negotiation teachers and scholars to make a paradigm shift from first generation negotiation thinking toward second generation thinking or, as has been described elsewhere, from “Negotiation 1.0” to “Negotiation 2.0” (Fox: 23).

The second year of the negotiation project challenged us to test and refine these new ideas in practice. It is one thing to have good ideas. It is quite another to translate new ideas into concrete teaching strategies and to know whether and how the strategies hold up in application. As a result, one goal of the project’s second year was to deliver an actual negotiation course that would test “second generation” ideas on the ground. On October 12, 2009, we conducted a one day executive training at Bilgi University in Istanbul for that purpose.<sup>2</sup> This article reflects on that experience. It is divided into four sections:

- 1) What we mean by “second generation” negotiation teaching;
- 2) what second generation ideas we incorporated into the design of this pilot training;
- 3) what our actual experience was on the ground; and
- 4) what insights we can derive from the training, for ourselves and other trainers.

## What We Mean by “Second Generation” Negotiation Teaching

We should explain what we mean by the term “second generation” training. The negotiation field, along with negotiation teaching, is well developed and mature. As stated elsewhere, the current (first generation) negotiation canon

- Treats negotiation as a strategic and instrumental process.
- Teaches students that the negotiator’s central challenge is learning how to develop and enact rational strategies to claim and/or create maximum value that satisfy self-interest.
- Offers many diagnostic, analytic and predictive tools for negotiators, for example tools based on our understanding of individualistic factors such as brain functions (Tom et al. 2007), cognition (Birke and Fox 1999), behavioral and games theories (Bolt and Houba 2002).
- Gears negotiators’ tools toward a better understanding of internal thought processes (own and counterparts); how to

“game” the process of interaction between negotiators; and how to achieve better outcomes (Fox: 13).

While “second generation” negotiation scholarship does not reject this first generation wisdom, it reflects a different focus and emphasis. Second generation negotiation thinking reorients how we examine negotiation. Instead of assuming we can plan, “game” and develop strategic roadmaps for our negotiations, “this new view shifts our focus to examining the language, interactions and meaning that emerge organically as the negotiation process unfolds” (Fox:22). Second generation thinking also calls on us to shift our focus to the deeper and more complex realm of worldview – and worldviewing. As a result, in addition to studying negotiators themselves (as is part of first generation negotiation thinking), second generation negotiation thinking challenges us to focus on the social worlds in which they operate as well as the “space between” negotiators, “where new meaning is made and remade” (Fox: 22).

At a practical level, second generation negotiation thinking calls for negotiators to develop a heightened and perhaps different awareness of themselves and others. It also calls for us to possess the tools and ability to act in the “here and now” of complex and multi-layered environments. Among other outcomes, year one of the NT 2.0 project produced articles examining a number of these “second generation” ideas including, among others: the importance of reflective practice (LeBaron and Patera 2009), curiosity (Guthrie 2009), negotiating one’s own public identity (Tinsley et al. 2009), cultural difference (Nolan-Haley and Gmurzynska 2009; Bernard 2009) and worldview (Fox 2009). In designing our Istanbul training, we wanted to incorporate and test as many of these ideas as possible.

In addition to new ideas that emerged about the negotiation *process* itself, we also wanted to test new ways of engaging in the process of negotiation *teaching*. A series of articles from the project’s first year also examined negotiation teaching methods, raising, among others, such questions as: Should role-plays continue to be a central part of negotiation pedagogy (Alexander and LeBaron 2009)? Can curiosity be taught (Guthrie 2009)? What lessons can we take from adult learning research (Nelken, McAdoo, and Manwaring 2009)? And what guidelines must we follow for training outside our own cultures (Abramson 2009)?

### **Designing a “Second Generation” Training Course**

Our training was intended to test a selection of these ideas in a typical negotiation training setting. Negotiation is taught in many formats: semester-long academic courses, intensive multi-day courses

tailored for a particular client or industry, short executive courses that are open to any registrant, and online and distance courses, among others. We were asked to design and test a one-day, open-enrollment executive training course (one that was not designed for any specific client or organization). The training planning group believed this would best test what many teachers and trainers face in actual practice, including the surprises and practical problems that arise on the ground.<sup>3</sup>

It is challenging to conduct any meaningful course in only one day, even with the most refined and proven content and methods.<sup>4</sup> It is much more challenging to do this while testing new content and delivery methods and while working in a new cultural setting.<sup>5</sup> As a result, we focused on three specific content considerations that we believed reflected the direction of the project's second-generation work:

- Increasing self-awareness;
- cultivating curiosity; and
- the over-arching importance of worldview.

At the same time, in designing the training, we did not abandon "first generation" principles. The planning team kept certain central negotiation concepts in place: positions, interests, distributive and integrative mindsets, concern for self and other, and psychological influences, among others.

We also focused on four pedagogical considerations that we believed would push the training in new directions:

- Using actual negotiation situations rather than role-plays as a primary vehicle for learning;
- approaching the course from a highly elicitive rather than didactic mind-set;
- employing multi-dimensional rather than "single purpose" exercises to examine the negotiation process; and
- considering different social worlds when addressing course design.

Each of these content and pedagogical choices is explored in detail below.

## *Content Design*

### **Self-awareness**

The importance of self-awareness in conflict work is not new. In the fields of psychology and mediation, a great deal of scholarship has emerged concerning mindfulness (Baer 2003; Bowling and Hoffman 2003; Riskin 2006). Even in the negotiation field, the importance of negotiator self-awareness is growing (Riskin 2006; Shapiro 2006).

Nevertheless, as the NT 2.0 project addressed emerging themes in the field, the importance of self-awareness stood out.

We wanted to test teaching concepts regarding self-awareness on two levels: First, how can we help negotiation students develop their own sense of self-awareness *as negotiators*? And second, how can we, *as teachers and trainers*, have the necessary self-awareness to approach our teaching work most effectively?

### Curiosity

In his article on the subject, Chris Guthrie (2009) describes the importance of curiosity to negotiation in the following way:

Good negotiators must understand their counterparts' perspectives, interests, and arguments to do well at the bargaining table. As Roger Fisher and his colleagues observe in *Getting to Yes*, "[t]he ability to see the situation as the other side sees it...is one of the most important skills a negotiator can possess" (Fisher, Ury, and Patton 1991: 23). To understand one's counterpart, a negotiator needs to be curious about what her counterpart has to say. In other words, a negotiator should cultivate a "stance of curiosity" (Stone, Patton, and Heen 1999: 167) or develop "relentless curiosity about what is really motivating the other side" (Shell 2006: 87). (Guthrie 2009: 63).

Curiosity can be loosely defined as "a desire to know or to explore" (Guthrie 2009: 65). This desire can be dispositional – that is, a person expresses a general trait or tendency to express interest in others, regardless of the context or setting. It can also be situational – that is, a "transitory feeling of curiosity that arises in a particular situation" (Guthrie 2009: 65). But can either form of curiosity be learned? Citing Lowenstein and other scholars in the field, Guthrie suggests that situational curiosity (and, indirectly, dispositional curiosity) can be enhanced. The question, then, is how?

Guthrie identifies several helpful factors to enhance curiosity: the importance of being in a good mood; the value of working with others; and the importance of engaging in novel or complex activities that are capable of being comprehended. He further suggests three strategies negotiators can use to enhance their own sense of curiosity: developing specific listening skills, remembering the reasons for being curious while engaging in listening and interacting at the bargaining table, and varying the forms of inquiry and eliciting information (Guthrie 2009: 67). These three strategies can also be transported into the negotiation training environment. In order to enhance curiosity, negotiation students can be asked to identify con-

crete listening and understanding goals prior to participating in simulations and exercises. They can also be asked to identify, ideally in writing, the purpose they believe careful listening will serve. Finally, they can be instructed to try a variety of ways to elicit information from their negotiation counterparts.

### Worldview

The third concept we wanted to address in our training was “worldview” and its relation to the negotiation process. Several articles from the first year of our project pointed to the growing recognition that, as Walter Truitt Anderson has stated, “reality isn’t what it used to be” (Anderson 1992). Negotiators increasingly interact across the globe and, even within the boundaries of their own communities, across different social worlds.

As has been written elsewhere, there is considerable research into culture and conflict (Faure and Rubin 1993; Menkel-Meadow 1996; Avruch 1998; Elgstrom 1999; Weiss 1999; Brett 2001; Avruch 2004). However, a great deal of this work tends to look at culture through specific national or “group” lenses, which can lead to a mechanistic understanding of how negotiators interact across social worlds. And as Michelle LeBaron has written, cultures exist within larger systems, or “worldviews” (LeBaron 2003: 11). Thus, the concept of “worldview” goes beyond “culture” as traditionally conceived. It more fully reflects the complexity and dynamic nature of how individuals and groups understand and interact with their social environment.

The *New Oxford American Dictionary* defines worldview as a “a particular philosophy of life; a concept of the world held by an individual or a group...” (New Oxford American Dictionary 2005). Pearce and Littlejohn refer to worldview as a moral order, or “the theory by which a group understands its experiences and makes judgments about proper and improper actions” (Pearce and Littlejohn 1997: 51). Worldviews are “deeply embedded in our consciousness, shaping and informing our identities and our meaning-making. They inform our big-picture ideas of the meanings of life and give us ways to learn as well as logic for ordering what we know” (LeBaron 2003: 11). As Jane Seminare Docherty states,

In order to delineate any worldview (including our own), we need to know how the person or group under scrutiny answers the following questions[:] What is real or true (Ontology)? How is “the real” organized (Logic)? What is valuable or important (Axiology)? How do we know about what is (Epistemology)? How should I or we act (Ethics)? (Docherty 2001: 51).

This focus goes beyond what first generation negotiation scholarship generally considers. It also reflects a concept we wanted to address in our executive training.

### *Pedagogical Design*

In addition to the three content elements discussed above, we also identified several pedagogical goals for our pilot training course. Each goal is intended either to challenge existing teaching methods or to test new approaches to learning how to negotiate.

#### **Role-plays**

As Nadja Alexander and Michelle LeBaron have written, role-plays (also referred to as simulations, practice sessions or games) have become arguably the most popular form of experiential learning in our field (Alexander and LeBaron 2009: 182). However, despite their popularity, role-plays have pitfalls. This is particularly the case when we think of teaching negotiation across very different cultural and social settings.

Role-plays are "...a learning activity in which participants are asked to assume a role, the characteristics of which are usually provided to them in written form, and to play out a negotiation or part of a negotiation with others who also have assumed roles" (Alexander and LeBaron 2009: 182). This taking on of another's role raises several concerns. First, in some cultures, "taking on others' identities may be perceived as disrespectful and nonsensical" (Alexander and LeBaron 2009: 182). Indeed, Alexander and LeBaron assert:

When a group has a strong ethic of non-interference, then "playing" someone else may feel inappropriate and invasive. While role-playing does exist in social spaces in cultures around the world, it is generally a part of elaborately marked social rituals involving masks, music, drumming and other markers of "time outside of ordinary time" that clearly communicate the limited purposes of the role-play. Without such markers, it is an approach that – for many – may be fraught with pitfalls and potential traps. Not only does it elicit cultural stereotypes (which may be all that are available to inform the playing of an unfamiliar identity), but it literally takes people "out of their skins" into a synthetic situation that may have little relevance to their lives, and limited transferability to actual negotiations (Alexander and LeBaron 2009: 182-3).

Second, role-plays may not always be effective. Citing research from neurophysiology, Alexander and LeBaron suggest that learning is more effective when practicing and imagining oneself, rather than adopting the identity of another, fictitious character.

People need context to interpret and understand ideas, and apply skills appropriately for a variety of real life situations. They need to be able to recognize and develop flexible strategies to deal with the emotional tension inherent in real negotiating situations where something important is at stake, and they need to understand the impact of their own attitudes to risk in negotiations. When context is artificial [as in role-plays], knowledge and skills may be similarly artificial, thus reducing the likelihood of the transfer of skills into real situations (Alexander and LeBaron 2009: 184).

Finally, even if role-play is effective in the short run, some studies have questioned the overall effectiveness of role-plays to impart skills that are later transferable into real-life settings (Movius 2008; Van Hasselt, Romano, and Vecchi 2008; Alexander and LeBaron 2009: 187, citing Lewicki 2000. See also Druckman and Ebner, *Enhancing Concept Learning*, in this volume; Ebner and Kovach, *Simulation 2.0: The Resurrection*, in this volume).

At a practical level, role-plays are written in a particular cultural context with instructions and content reflecting the assumptions, expected social norms, interaction patterns and indices of that particular culture. When simulations are used in a different cultural context (particularly without modification) there may be unexpected problems. Even small details in the written instructions of a role-play may hamper its effectiveness when used in a different setting. On previous occasions, the authors of this article experimented with role-plays written in the United States or by northern European institutions in trainings with various Turkish participants. Each time, the participants ran into problems with the role-plays themselves, distracting them from the purpose of the exercises. For example, the role-plays written in the United States assumed certain American institutional frameworks, functions, procedures and norms of conducting bank transactions that do not apply in other countries. They also assumed hourly fees for attorney services where such arrangements would not work in many communities.

These examples are easily observable and relatively simple challenges to address when transferring role-plays from one cultural context to another. However, there are also less visible differences that require an understanding of the differences in worldviews be-

tween the setting in which the original role-play was written and the community in which it is to be used. Moreover, even an understanding of differences in worldview might not address the concerns raised about the use of role-plays. Given the popularity of role-plays in first generation negotiation courses, our own previous experiences and the concerns raised about them by Alexander, LeBaron and others, we wanted to test a training that included some significant non-role-play elements. Thus, our course in Istanbul was designed to highlight experiential and “real” activities other than role-plays.

### **Elicitive vs. didactic teaching strategies**

Negotiation courses are generally interactive. As discussed above, role-plays and subsequent de-briefings have become a central feature of negotiation training, where students and the instructor engage in regular give and take. Even class presentations often include significant discussion. At the same time, this give and take can be very directive, where students are told what to think about and how to think about it.

One of the outcomes of our first pedagogy conference in 2008 was the aspiration for “Negotiation 2.0” courses to be not only interactive but highly elicitive. By this, we mean that the instructor intentionally seeks out students’ own lived experiences and views about not only topics the instructor introduces, but also topics the students introduce themselves. This elicitive philosophy honors the negotiation experience most students bring to their negotiation courses. For example, in their chapter on negotiating learning environments, Melissa Nelken, Bobbi McAdoo and Melissa Manwaring take up the idea of enlisting students in designing parts (or even all) of their negotiation course and strongly encourage this as a general teaching method (Nelken, McAdoo, and Manwaring 2009). We wanted to test this concept in our pilot training by intentionally seeking input from our students in elements of the course design and in shaping the training day as it unfolded.

At the same time that we wanted to encourage student input, we recognized from our own teaching experience that many cultures reflect traditional forms of education where formal lectures are expected. Specifically, we understood that Turkish instructional norms are different than in the United States or the Netherlands. It is challenging to adopt a purely elicitive approach to teaching in a formalistic culture with a relatively large power distance – cultural features that are commonly observed in Turkish society. In such formalistic contexts, participants may interpret a trainer’s elicitive teaching approach as inadequate, if not incompetent, undermining the trainer’s legitimacy, authority and effectiveness. Moreover, students may not

have the experience of interacting with instructors in such informal and co-equal ways, and might not appreciate (or even understand) such a different approach to teaching and learning.

The challenge of elicitive training in formalistic cultures has received attention in the literature. For example, Mohammed Abu Nimer has reported this as a common problem in trainings conducted in Middle Eastern cultures (Abu Nimer 1998: 104). In one training, Abu Nimer notes that a participant from the Middle East advised the training team that “knowledge comes from or is delivered by the experts, otherwise, this will not be taken seriously” (Abu Nimer 1998: 104).

To complicate training design further, individuals and different sub-groups within a society may have different experiences and expectations than would be found as a general rule within a society at large. For example, seasoned businesspeople may have exposure to workshops and conferences where a variety of different teaching methods are used. They may be well traveled and adaptable to different learning environments. Moreover, they may expect a trainer to recognize and respect their professional experience. Participants like these may welcome (if not expect) a more elicitive approach to teaching, even if they are members of a formalistic society. We saw the course in Turkey as an opportunity to test out this tension between elicitive and didactic teaching and learning strategies.

### **Multi-dimensional activities**

One common negotiation teaching method is to design an exercise or activity to highlight a single, specific, learning point. For example, students may be asked to take a written fact pattern and, working in groups, identify the various parties’ positions, interests and issues or to negotiate a single-issue problem with a counterpart. In this way, students are able to try out distinct concepts through practice. Over the course of a training program, students will participate in a series of activities that, taken together, provide a conceptual frame for the negotiation process.

While single-purpose activities can offer conceptual clarity, they present a challenge for short duration courses (such as our one-day training). Each activity is time-consuming. Therefore, course designers are faced with difficult choices as to which activities (and, as a result, which discrete learning objectives) to include and which to leave out of a training agenda. In addition, a negotiator’s lived experiences are typically not “single purpose.” They are multi-dimensional. Their experiences are often saturated with a range of potential insights and lessons. We wanted to test ways to address this dilemma. Moreover, we wanted to try out learning activities that

allowed for a richer and more sophisticated examination of negotiation and that, at the same time, could provide certain efficiencies during the training day.

There are two elements to effective experiential learning: the first is thoughtful design of the experience itself. As discussed above, we chose not to use simulations as the base for our experiential learning, but rather to look for interactions that would be real and relevant to the training participants themselves. We also chose not to use single-purpose activities. For the Istanbul training, we wanted to incorporate experiences that were more saturated with a number of potential insights.

The second element of experiential learning focuses on the debriefing process itself. Debriefing experiential learning is not a random or *ad hoc* process. It is a structured process based on its own body of research (Lederman 1992). Effective debriefing involves several distinct phases: systematic introduction to self-reflection; intensification and personalization of the debriefing process; and generalization and application of the learned principles to new situations (Lederman 1992: 151-152). Each phase helps students fully process their learning. Because we were seeking to test ideas that could work well in a “typical” short course, we wanted to explore how to design and make better use of single (real) course activities that might serve multiple learning objectives.<sup>6</sup>

### ***Cultural Considerations***

Our final pedagogical consideration in planning for the Istanbul training focused on culture. The Istanbul course was, purposely, to be taught by American and Dutch trainers in Turkey for Turkish professionals. This design forced the planning group and trainers to address at least some of the challenges faced when teaching in cross-national and multi-cultural contexts.

In his article *Outward Bound to Other Cultures: Seven Guidelines*, Harold Abramson identifies a set of practical considerations trainers should address before embarking on a negotiation course in a new cultural environment (Abramson 2009). These considerations emerged from observations of the negotiation training given in Rome in 2008 as part of the NT 2.0 project’s first year initiative. Based on that training, and building on his own international teaching experience, Abramson identified the following seven guidelines:

- 1) Acquire a Culturally Educated Lens;
- 2) Behave Like a Guest: Be Flexible, Open-Minded, and Elicitive;
- 3) Be Mindful of Cultural Assumptions and Differences and Adapt Training;
- 4) Educate Participants about Training Techniques;

- 5) Adjust Presentation When English is Not the First Language of the Participants;
- 6) Refashion Materials and Presentation Based on Purpose(s) of Training; and
- 7) Plan to Evaluate the Training Program (Abramson: 294).

The planning team and trainers kept these guidelines in mind when designing the Istanbul training. Moreover, with respect to all of the design considerations addressed above, we tried to develop at least some activity that could test theory in practice. The most difficult question we faced was how to incorporate all these considerations into a one-day executive training.

### **Our Experience on the Ground**

The one-day executive training involved approximately twenty Turkish professionals, together with a few university student participants. It was held at Istanbul Bilgi University in a lecture hall equipped and staffed for simultaneous language translation (Turkish – English; English – Turkish). As previously noted, in addition to the two primary trainers, we had the assistance of five other experienced trainers who served as coaches, representing five different cultural backgrounds.<sup>7</sup>

We had a total of six contact hours with the participants. Given such limited training time, we had to carefully select the activities we considered essential for an introductory training. Some elements were consistent with traditional “Negotiation 1.0” teaching and some tested “Negotiation 2.0” principles. The agenda (see Appendix One) included the following elements:

- Understanding oneself as a negotiator;
- Introduction to key negotiation concepts;
- An experiential activity related to the mid-day break;
- Addressing the tension between claiming and creating value;
- A focus on micro-skills; and
- A closing consultation.

We do not recap the entire training day here. Rather, we identify certain specific activities that tested second generation thinking. In particular, we discuss three tensions we found ourselves managing on the ground:<sup>8</sup>

#### ***Tension One: How to Adopt a Highly Elicitive Approach to Training While Honoring Traditional Teaching Methods of Our Host Culture***

As discussed above, one key feature of second generation teaching is to approach the learning process from a highly elicitive standpoint. At the same time, as Abramson points out, it is important to adapt

the training to honor the cultural assumptions and differences of our host community (Abramson 2009). From past training experience in Turkey, we understood our students to expect a certain degree of formality and to have formal lecture presentations of material. The trainers and planning team spent a great deal of time discussing how to manage this tension.

In the end, we adopted a mixed model, where some of the day was very elicitive and interactive, while some was quite traditional, particularly in formally introducing key negotiation principles. We learned the following:

- 1) It was very important at the beginning of the day both to acknowledge that we were guests in Istanbul and to be explicit about how we hoped to approach the training day. We began by speaking a few words of Turkish (which brought some amused smiles), acknowledged that our approach to teaching might be different than what the participants were used to, and then described the “international format” of the training we hoped to use (Abramson’s guideline #4). The participants seemed comfortable with the format.
- 2) It was very important to observe participants’ responses and interactions as the day began. As we discuss in greater detail below, we moved quickly from introductions into a highly interactive ice-breaking activity. This gave us a chance to observe and gauge how comfortable the participants were with our approach to the course.
- 3) Simultaneous translation interfered with our ability to interact spontaneously with participants, which had a direct impact on the degree to which we could be truly elicitive. It also tended to reinforce formal and didactic communication, where participants sat and listened through headphones rather than engaging directly with the trainers and each other. At the beginning of the training day, we did not know the English language proficiency of the participants and assumed that most participants would be listening to us through headphones. As it turned out, many of the participants understood and spoke English (although we still spoke to the group with interpreters and translation in mind). As the day went on, we worked differently with the interpreters so as to allow more natural interaction with the participants. As we discuss below, this experience led to several insights about the value of advance knowledge of participants’ language proficiency and how best to work with interpreters in training.

Our experience with interpreters in Istanbul also brought to mind a previous attempt to work across language barriers. In a prior training, rather than using simultaneous translation, two of the authors organized a course where at least one trainer spoke the local language (two of the authors are English speaking and one is Turkish). We faced numerous problems related to language. First, the presence of two trainers who spoke different languages with the participants required consecutive (as opposed to simultaneous) translation. This proved to be very time consuming. In addition, in order for the non-native speaking trainer to understand everything that was happening in the training room, the native speaker had to turn her attention away from the participants, creating an added distraction.

***Tension Two: How to Load Maximum Learning Into Minimum Time While Remaining Responsive and Interactive***

We had a very ambitious agenda for this introductory course. Six contact hours is quite short, particularly when we wanted to remain responsive to the emergent learning moments that arose during the day.<sup>9</sup> Moreover, we had learned an important lesson from the NT 2.0 project's prior training experience in Rome. There, in the trainers' zeal to introduce as many important principles as possible, they somewhat lost sight of the students' ability to absorb and process the learning. We addressed this tension in two ways.

**1) Keep it simple**

We had to resist the temptation to introduce everything that was interesting to us, or what we thought would impress our students. Instead, we had to focus on the essentials of negotiation. During our planning process, we distilled the course down to four learning objectives: understanding oneself as a negotiator; introducing core negotiation concepts; practicing certain key "micro-skills;" and reflecting on how to carry the lessons forward. We found that even these essentials were more than enough for one training day.

**2) Design multi-dimensional activities**

As discussed above, negotiation courses often include single-purpose activities. While it might appear oxymoronic to have simple yet multi-dimensional activities, we wanted to make full use of each activity, not only to use our time more efficiently, but to reflect the complexity of human interaction and to test these experimental activities' effectiveness in the classroom. Two activities that we employed illustrate this concept.

***Human thermometer.*** We opened the training by asking participants to form a “human thermometer” – a single line where they organized themselves along a continuum in response to our question prompts. We encouraged the participants to talk with one another (in Turkish if they chose) as they found their proper place in the continuum. We asked that there should be no “clumping” – that is, they must locate themselves along a single line of participants rather than group around some imaginary point on the continuum. The group had to organize, and then re-organize in response to each of the following prompts:

- Line up from least to most years of professional negotiation experience.
- Re-organize based on what percentage of their work day they engage in professional negotiation.
- Re-organize based on what percentage of their negotiation work is international.
- Re-organize based on the degree to which, in their professional negotiations, they care about preserving the relationship with their counterpart as opposed to getting the best deal for themselves that day.
- Re-organize based on how hard they work to help their counterpart to improve his or her own outcome at the negotiation table.
- Finally, re-organize based on how much of their negotiation activity is a regularized ritual, as opposed to specific negotiation choices that are unique to each negotiation situation.

Following the series of prompts and line-ups, we debriefed the activity while the participants still stood around one another in the front of the classroom. We had multiple purposes for this activity: first, to engage the participants immediately in a highly interactive (and fun) activity that set a tone for the day and that related directly to the focus of their learning; second, to provide an ice-breaker that would allow participants to talk with a large number of their colleagues in a short amount of time about topics relevant to the day as they got to know one another; third, to elicit, from the participants’ own lived experiences, key information on topics we would return to as the training day unfolded; and fourth, to give us an opportunity at the outset of the training day to check some of our assumptions regarding the experience and general approach towards negotiation of the students. We also saw this as a real, as opposed to simulated, activity since it drew directly on each participant’s own life experience.

*Negotiating for lunch.* The second example was a negotiation for the length of their lunch break. Lunch was scheduled to follow an introduction to key negotiation concepts. Shortly before the time set for the lunch break, we asked the participants to move into groups of four. Then, without further direction, we asked the participants to negotiate within their groups and decide how much time they wanted for their lunch break (we offered a range of fifteen minutes up to two hours). The group whose decision came closest to the average of all groups would win a prize. We then honored the calculated average and broke for lunch.

We wanted the participants to engage in a real (albeit simple) negotiation immediately after discussing key negotiation concepts. We also wanted not to use a role-play, but instead to engage the group in a negotiation that had some real impact (again, on a simple level). This activity served several purposes. First, participants negotiated with one another without assuming a role other than themselves, thereby supporting more natural interaction. Second, because the subject related directly to how they wanted to use their time, there was a greater possibility of investment in the outcome. Third, although we were somewhat directive (in asking the group to engage in the negotiation exercise), we were honoring participants' ability to make a training design decision for themselves – how they wanted to use their time. And fourth, it was an example of an “oblique”/“dis-orienting” exercise (see Manwaring, McAdoo, and Cheldelin, *Orientation and Disorientation*, in this volume). They were not asked to focus on their negotiation skills, although they needed to use them. This allowed us to debrief the experience after lunch on several levels: their approach (distributive vs. integrative); and the nature of their interactions with specific group members (deference to individuals because of age, experience, etc.); the relevance of the prize (strategy, competition vs. cooperation). It also set the stage for a closer look after lunch at competition vs. cooperation (we used “X-Y,” a variation of the classic Prisoner’s Dilemma game) and a focus on micro-skills later in the afternoon (see also Ebner and Kamp, *Relationship, Version 2.0*, in this volume).

### ***Tension Three: How to Examine Worldview and Culture When The Trainers are the “Outsiders”***

One of the central themes that emerged from the NT 2.0 project’s first year was the importance of worldview and culture to negotiation. And one of the central challenges we faced was how to engage participants in a process of examining worldview during a one day executive training. A traditional way to address culture is to introduce research into cultural differences based on group member-

ship (such as national or other identity). We did not want to do this. Instead, we wanted to explore the lived experiences of the participants. Yet, we were outsiders to their culture and views.

Rather than attempting to “teach” about culture formally, we approached the question of worldviews informally and conversationally throughout the day. We brought up our own experiences as outsiders to Turkey and asked for insights into what we observed. We asked participants to draw on their own experiences, both domestically and internationally, about what they had experienced with negotiation. We shared our own lived experiences as negotiators (and negotiation teachers) who have worked in a variety of countries, contexts and work settings. This led to a recurring conversation throughout the day about differences in how we each make sense of our interactions with others and how that “sense-making” relates to the negotiation process.

This conversational approach to examining worldview is consistent with the idea that worldview, culture and communication are deeply intertwined. (Pearce and Littlejohn 1997; LeBaron 2003; Folger, Poole, and Stutman 2009). This approach allowed us (trainers and participants alike) to practice what LeBaron calls a form of “cultural fluency,” where, through conversation, we opened ourselves up to understand one another better and in a spirit of inquiry (LeBaron 2003: 53). This approach also honored several key objectives for our training: it reflected (and modeled) curiosity; it focused on achieving greater self-awareness; and it enacted an elicitive approach to teaching and learning.

## Insights and Lessons from the Field

The Istanbul training offered a number of valuable lessons for future negotiation teaching, both philosophical and practical.

### *Philosophical Lessons*

Further work is needed to develop and clarify what distinguishes first from second generation negotiation principles. While we understood these concepts in isolation from a training setting, once in the classroom, we found ourselves interacting with the students in ways quite similar to previous trainings. This reveals two insights:

First, Negotiation 2.0 is in some respects *evolutionary* in nature. That is, it involves a further refinement of what we have already learned about the negotiation process and teaching. We can use new teaching methods to better elicit long-standing negotiation principles. Our experience suggests that some of what we consider second generation thinking grows directly from first generation roots.

Second and at the same time, Negotiation 2.0 is *revolutionary*, in that some concepts require a paradigm shift in how we interact with our negotiation counterparts and our students. It requires a different “presence” at the negotiation table and in the classroom that is much more in tune with, and responsive to, those around us. As trainers in Istanbul, we had not completely made that shift. We were trying out a collection of “2.0” activities but from the standpoint of “1.0” thinking. That is not unlike a distributive negotiator believing he is being integrative simply because he is acting “nice” to his counterpart.

At least some second generation concepts require a fundamental paradigm shift, both with respect to how we understand the nature of negotiation interaction, and with respect to the nature of how negotiation teachers interact with students. The moments when we were most in tune with “2.0” thinking were the moments when we were most engaged, “present” and responsive to our participants, such as when we were talking about differences in worldviews. These moments came about, in part, because we as trainers were genuinely curious, elicitive and self-aware ourselves. And, in our own “oblique” way, by letting go of our roles as instructors, we actually enhanced what the participants were able to learn about self-awareness, curiosity and other qualities that are part of second generation negotiation thinking. This warrants further reflection and study.

### ***Practical Lessons***

There is wisdom to the proverb that “for want of a nail...the kingdom was lost.” Despite months of planning with an expert consulting team, practical challenges still interfered with a smooth training. In addition to the very useful guidelines described in Harold Abramson’s *Outward Bound* article (2009), we offer the following:

#### **1) Work directly with a single local event organizer**

Working from a distance with different intermediaries can complicate planning. For example, we were working with a relatively small class of twenty. However, because we requested simultaneous translation and did not have direct communication with our local organizer, we were assigned to a venue with language translation booths that did not otherwise fit our needs – a 300-seat theater-style lecture hall. Had we been able to communicate directly, we might have been able to consider different choices.<sup>10</sup>

## **2) Obtain specific information from and about trainees in advance.**

Late changes in registration made it difficult for us to communicate with and learn about the course attendees in advance. As a result, we had to make final design decisions based on assumptions about our students rather than based on direct information. Working in a different cultural context complicated our ability to know our trainees. As it turned out, the students brought different backgrounds, knowledge, and language abilities than we had anticipated.

A simple advance questionnaire can provide useful planning information. This questionnaire can best be included in registration materials (as this is the moment where students have to send something back anyway) and can be either in electronic or paper form. The questionnaire could be sent either in the trainer's own language or translated into the local language. Each has its advantages. A questionnaire sent in the trainer's language does not require the assistance of a translator to write and interpret. It can also provide a rough indicator of participants' language proficiency. However, it may preclude responses from participants who are not familiar with the trainer's language. In contrast, a questionnaire that is translated into the local language will require a local language-proficient partner to assist with writing and interpreting responses, but may yield more complete information about the class. A sample questionnaire is found at Appendix 2.

## **3) Do your homework**

Negotiation concepts, publications, and teaching are not uniquely Western and we (as negotiation teachers) are not prophets. Negotiation knowledge is ancient and widespread (Chamoun-Nicolás and Doyle 2007). As a result, it is important to learn about what the community you are working in already knows about negotiation and what has been published in the local language.<sup>11</sup> Consult with native speakers familiar with the negotiation literature. We had the benefit of prior experience in Turkey to know that, like elsewhere, there was a wide variation in the knowledge and sophistication about negotiation our students might bring into the classroom.

## **4) Meet on site in advance with coaches and translators**

We worked with an international team of coaches. It was not possible to hold advance coach meetings, but we were able to communicate by voice and email. We found it valuable to provide the coaches with detailed information in advance about the training, including our underlying training philosophy and their roles. But it was not until we were all in the training room that we could work through

the details of who would do what, given the realities on the ground. For example, we found it very useful when our coaches worked with small groups of participants to discuss key concepts and debrief activities. Particularly with respect to language differences, these more intimate settings allowed the coaches to help participants informally and more directly to internalize lessons from the training.

Similarly, as Abramson writes, it is important to meet with the interpreters in advance to discuss specific terms of art and to outline how the training day will unfold (Abramson 2009: 308). We gave our interpreters copies of our detailed training schedule and slides. We discussed specific terms that we would be using and made sure they agreed on the correct translations. This can be critical at a training in a different cultural context. In some cultures, multiple terms might be used to describe a particular negotiation concept. Translators may not be familiar with negotiation theory and context and, thus, may not be aware of the significance of using one term instead of another. For example, in previous training experiences in Turkey we have seen translators interpret words like “interests” to mean “financial interests” and “neutral attitude” to mean “harmless.”

We also reviewed with our interpreters when we would be working with the class as a whole and when we would be working in small groups. The interpreters thus knew when they needed to work from the interpreter’s booth and when to move around the room as we worked with small groups and pairings.

#### **5) Be realistic about what can be accomplished within a set schedule**

If you only have six hours to teach basic negotiation principles, accept the fact that you need to make difficult choices. You may need to discard content and group discussion that you think is “indispensable” – or a personal favorite. In the same way you work to manage participant expectations, apply the same expectation-management principles to yourself.

#### **6) Curiosity and worldview are important to teach, but difficult to translate into specific activities**

These are not discrete skills to be learned. Rather, they are qualities and insights to be understood and cultivated. We found the most valuable way to help participants appreciate these concepts was in the course of debriefing activities with apparently different learning purposes. On reflection, we also found participants best appreciating these concepts when we, as trainers, were most curious and transparent about our own worldviews. This is consistent with the concepts of “oblique” activities and multi-dimensional debriefing.

## Conclusion

Albert Einstein was right to recognize the wisdom of experience. The Istanbul training taught us a great deal. It was only the first of many attempts to translate second generation negotiation thinking into practice. Moving forward, negotiation teachers would be wise to test a few concepts at a time in a familiar environment.

## Notes

<sup>1</sup> Special Section: Second Generation Global Negotiation Education, 2009. *Negotiation Journal* 25(2): 141-266.

<sup>2</sup> The primary trainers were two of this chapter's authors, Ken Fox from the United States and Manon Schonewille from the Netherlands. Training coaches included Habib Chamoun-Nicolas from Ecuador, Noam Ebner from Israel, Idil Elveris from Turkey, Vivian Feng from China, and Bobbi McAdoo from the United States.

<sup>3</sup> In addition to the course trainers, the planning group included Jim Coben, Giuseppe De Palo, Chris Honeyman, Bobbi McAdoo and Sharon Press.

<sup>4</sup> During our first conference in 2008, a number of participants had energetic discussions on whether any negotiation teacher/trainer should ever agree to offer a negotiation course as short as one day. This question confronted the dilemma of trainees who insist on "quick" tips and tricks while at the same time wanting a "deeper" knowledge of the process. We do not expect the question to be resolved any time soon, but the exigencies of getting seventy professors from dozens of countries together at all have dictated using such "executive length" courses as an experimental framework. See generally Honeyman and Coben, *Introduction: Half-Way to a Second Generation*, in this volume.

<sup>5</sup> While this cultural setting was new for the pilot training, it was not entirely new to the training team: Manon Schonewille has worked and trained on a number of occasions in Turkey; Ken Fox has lived in Turkey.

<sup>6</sup> As we examined our "how to engage in multi-dimensional learning activities" concerns, we found ourselves repeatedly referring to the teaching methods of our colleague, Michael Wheeler. We came to refer to his multi-dimensional approach to debriefing as "Wheelerizing."

<sup>7</sup> See note two, *infra*.

<sup>8</sup> We tip our hat to Robert Mnookin and the three tensions he identifies in the negotiation process in his book *Beyond Winning*.

<sup>9</sup> Several participants commented in their course evaluations that they wished the course had been at least twice as long, and a number of participants said they wanted more time with each activity.

<sup>10</sup> We did improvise. At the last minute we organized tables and chairs on the stage portion of the theater classroom, where we invited students to do the small group work.

<sup>11</sup> For example, a glossary of conflict resolution terms in Turkish can be found in a dictionary (*Sozlukce*) in Beriker (2009).

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## Appendix One

### Sample One-day Executive Negotiation Course Trainers’ Outline

#### Pre-training Preparation

Generate, translate into local language and distribute the following items:

- Cover letter to participants (including request to complete and return the pre-session questionnaire and to complete in advance the Shell or Thomas-Kilmann bargaining style assessment tool)
- Course agenda
- Pre-session questionnaire
- Bargaining style assessment tool
- Interpretation of tool
- Trainer and coach biographies
- Post-training evaluation form

Hold conference call with coaches to review expectations and roles.

**Materials/Preparation Note:** *Distribute overview memo, simulations and other materials.]*

Have local contact read responses to pre-session questionnaire (if translated into local language). Discuss with local contact any insights that emerge about group (cultural cues, language capabilities, prior knowledge and experience with negotiation, etc.).

Meet with language interpreters the day before training at training site. Check room set-up and translation equipment. If translation booths are used, discuss the physical flow of the training day so interpreters can identify technical issues. Discuss fallback options with interpreters in case of equipment problems. Review written materials, slides and any videos with interpreters. Discuss technical terms so as to assure correct translations.

**Materials/Preparation Note:** *Provide copies of materials and videos; Make list of jargon for the translators.]*

#### 09:30 Official Start Time

Depending on local cultural norms, assume some participants will arrive late. During the first 20 minutes or so, give participants the chance to complete the Bargaining Styles instrument (if they haven’t already) and to look at and discuss the Bargaining Styles interpretive information. Invite them to sit in small groups and talk informally about the instrument. Trainers

and coaches will circulate to answer questions regarding the Bargaining Style instrument and its interpretation. The small groups will likely work in their native language, therefore interpreters should circulate with coaches. [*Materials/Preparation Note: Have extra copies of Bargaining Styles instruments. Trainers and coaches will circulate, observe and note any emerging discussion themes and questions. Note them for the closing conversation.*]

### **10:00 Actual Start Time (or earlier, if most participants have arrived)**

Welcome and Setting the Stage

- Trainers give welcome and offer special thanks to host university or organization, sponsors, etc. Introduce coaches and trainers (depending on cultural norms, have local host or “dignitary” introduce you)
- Talk explicitly about the “international” format of training (highly interactive, elicitive and participatory)

Do a very quick round of introductions (name and affiliation only). Have them write names on name tag. [*Materials/Preparation Note: Paper name tags + marker on tables or chairs.*]

### **10:15 Ice Breaking Exercise (which includes using bargaining styles instrument)**

Have participants stand up and move to the front of the room (or along a long wall). They will be asked to line up in a single, physical, continuum in response to the question prompts, below. With each question, participants move to stand in relative position to other participants along the line (far left is least and far right is most) and they may not “cluster” around an imaginary point. They must sort themselves into a single line. [*Materials/Preparation Note: Be sure the training room has enough space for participants to move around and stand in a straight line. If not, use the corridor outside the training room. Be sure to coordinate the logistics in advance with the language interpreters.*]

During the exercise, encourage participants to talk with and ask one another questions (especially the people standing next to them as they decide where to move into line) to learn how/why they placed themselves where they did on the continuum. This provides a way to promote curiosity (which will be addressed as the day unfolds). Participants re-organize based on each new prompt.

The line-up prompts are:

- Least to most years of professional negotiation experience
- Percentage of their work-day that they engage in professional negotiation
- Percentage of their negotiation work that is international
- Degree to which they care about preserving the relationship with their counterpart as opposed to getting the best deal for themselves in a negotiation
- Degree to which they work to help their counterpart to improve his or her own outcome at the negotiation table

- Amount of negotiation activity that they see as a regularized ritual, as opposed to specific negotiation choices that are unique to each negotiation situation
- If all participants have previously completed the bargaining styles assessment, ask them to cluster around their preferred style (competing, accommodating, avoiding, compromising, collaborating).

### **10:45 Demonstration, Leading to Discussion of Key Concepts and Greater Self-Awareness.**

This activity builds on the ice-breaker and bargaining style instrument to introduce key concepts in negotiation.

Have three coaches conduct a negotiation simulation in front of the group. Trainers will facilitate discussion. [**Materials/Preparation Note:** *Select a simulation that includes cultural/worldview differences between parties as well as differing needs and interests. Give interpreters advance copies of the simulation and discuss its key characteristics with them in advance. Have three coaches prepped in advance to do the demonstration. Trainers will facilitate discussion and feedback.*]

- Start with traditional positional bargaining, running the negotiation for a sufficient time period to demonstrate its underlying “mind-set.” Discuss with participants what they observe happening and what negotiator style(s) they notice on the bargaining styles scale.
- Replay negotiation (or continue forward) while shifting to an integrative model. Discuss with participants what they notice that is the same/different. Discuss what is significant about these differences.
- Open up discussion to include role-players. Invite participants to talk directly with role-players about aspects of role-play that illustrate key concepts. Surface the impact of culture and worldview on the nature of negotiation interactions.

Plenary debrief: identify and discuss concepts that did not already emerge from discussion (such as positions vs. interests, partisan perceptions, psychological issues/biases, underlying cultural/worldview influences on negotiator mind-set, value of (and how to promote) curiosity, etc. These will be covered more deeply after the morning break. [**Materials/Preparation Note:** *Trainers will have prepared slides of key negotiation terms and concepts to complement what is illustrated in demonstration. An alternative to live demonstration is to show appropriate negotiation videos. If used, interpreters should preview them to help with translation. Interpreters move from booth to circulate among small groups.*]

Follow up the demo and plenary debrief with a more general discussion that tracks the following question prompts (in small groups with coach assistance in each group).

- From your experience, what makes an effective negotiator?
- As you think about your own negotiation experience, what are your best successes? Most difficult challenges?
- What do you need to learn more about today to help you be a more effective negotiator?
- How can you draw on your personal strengths and weaknesses to be an even more effective negotiator?

Revisit bargaining style instrument to make connections to the various threads that emerge from the discussion.

### **11:45 Break**

### **12:00 Presentation of Key Concepts**

Formal presentation and discussion of key negotiation concepts. Specifically, cover: Distributive and integrative mind-set (claiming and creating value); positions, interests and issues; ZOPA, BATNA, WATNA, psychological influences; perspective, culture and worldview. [*Materials/Preparation Note: Slides for each concept.*]

### **12:50 Negotiate for Lunch**

Provide an immediate opportunity for participants to conduct a real negotiation that calls on them to use the concepts covered in the earlier session. Explore general preferences of group re: time for lunch (long lunch and move training end time beyond office hours, or short lunch and earlier finish); if sufficient spreading of preferences:

Break participants into groups of four each. Have each group negotiate how long the lunch break should be (anywhere from 15 minutes to 2 hours – the ZOPA). The afternoon session schedule will shift to an earlier or later end-time based on time allotted to lunch. The negotiation itself will be time limited (5 minutes).

At the end of the timed negotiation, each sub-group reports out the agreed upon time for lunch. All group times are then averaged. Members of the group whose own time is closest to the class average will receive a prize. [*Materials/Preparation Note: A minimum of 8 books or other valuable items to award as prizes.*]

### **1:00 Lunch Break**

Participants go to lunch for the amount of time determined in the group negotiation. [*Materials/Preparation Note: During lunch, re-calculate afternoon schedule if needed.*]

### **2:00 (or as determined by negotiation)**

#### **Reconvene**

Check-in regarding morning session. Debrief on lunch negotiation, reviewing key concepts (including introduction of time pressure). [*Materials/Preparation Note: Have X-Y materials translated into local language.*]

### **Extending Common Information Base.**

Begin with X-Y exercise. Debrief exercise to pull out the following concepts (again using small groups and reporting out ideas to the whole group):

- What is, and how does one manage, the tension between competition and cooperation (claiming and creating value)? (At the end of this part of the discussion, show video clip from *A Beautiful Mind* or the tit-for-tat scene from the hostage film to illustrate the tension.)
- How do communication, trust, and emotion affect decision-making?

- What is the role of relationship building?
- In what ways do worldview, culture, individual perceptions, and “framing” influence one’s process of choice?
- Where do concepts like “curiosity” fit in our understanding of these notions?

Have slides available to show concepts that were not drawn out in discussion. Also have questions on the slides to facilitate the small group discussions. [**Materials/Preparation Note:** *Have DVDs or online access to clips from “A Beautiful Mind” and other scenes to illustrate enlightened self-interest; have slides pre-loaded on various concepts so they can be used if necessary.*]

### **3:00 Micro-skills Session**

Divide into groups of four, sitting at tables. Identify specific micro-skills to practice, such as:

- Listening
- Asking questions
- Addressing partisan perceptions
- Reframing
- Paraphrasing
- Engendering curiosity

Each table discusses and then enacts the micro-skill prompted by the trainers’ questions. When ready, tables call out their response to the trainer prompt and other tables build on earlier responses. [**Materials/Preparation Note:** *Assemble “micro-skill” tools. Coaches sit with groups (including interpreters, where needed) to help small groups interpret concepts and practice activities.*]

### **4:00 Break**

### **4:15 Micro-skills, continued**

Continue with micro-skills activities.

### **5:00 Closing Consultation/Conversation**

Coaches report out their observations and what learnings or recurring themes they noted during the whole day.

Trainers facilitate open-ended discussion of what participants have taken from the day, what they still want to know more about, what questions/objections/“next steps” they have. Keeping underlying principles in mind, be sure to help participants synthesize the day’s elements, particularly from the micro-skills sessions. Return to over-arching themes for the day and begin pulling the threads together.

If sufficient time, end by having participants imagine they are preparing for their next negotiation situation. Discuss as a group what they will do the same, differently, and why.

Closing ritual and thank yous. [**Materials/Preparation Note:** *Hand out course evaluations to be completed before participants leave.*]

### **5:30 End**

## Appendix Two

### *[TITLE OF TRAINING] Pre-training questionnaire*

*To help us plan a training that is specific to your needs, please answer this short questionnaire and return to [insert e-mail or post address] before [date]*

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First Name and Last Name

---

Company / Law Firm

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Position and general areas of responsibility

1. How many years of professional experience do you have? \_\_\_\_\_

2. How long have you negotiated in a professional context? \_\_\_\_\_

3. How regularly do you negotiate professionally?

rarely    occasionally    frequently

4. In what type(s) of negotiations are you typically involved? (business to business; business to customer; international negotiations; lawyer to lawyer (transactions or settlement); other? \_\_\_\_\_

5. Have you attended any previous training courses on negotiation?

Yes    No

If yes, please describe the course(s): (for example, by whom was it offered, how many days, what topics were covered, and so on): \_\_\_\_\_

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6. How is your knowledge of the English language? Indicate competence on a scale of 1 to 5 (1 – basic; 5 – very strong):

Reading \_\_\_\_ Speaking \_\_\_\_ Listening \_\_\_\_

7. What do you expect to learn from this course? \_\_\_\_\_

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8. (optional) remarks: \_\_\_\_\_

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Thank you. Please return this form with your registration materials.

