Successful Negotiation

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Nothing to disclose.

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With whom do we negotiate?

... what about me?

2014  graduated PM&R residency CWRU (MetroHealth Rehabilitation Institute)
2014-15 stayed on faculty at CWRU
2015  joined Michigan Medicine
2017  musculoskeletal course director at medical school
2018  PM&R residency program director; educational faculty lead committee

I am also happily married and live with husband and brother-in-law at home.
With whom do I negotiate?
Find your shared space.

Understand the others who inhabit this space.
Know your best alternative to a negotiated agreement: your BATNA.

Understanding what your best alternative path entails, enables you to evaluate a potential outcome objectively. You will be able to walk away from the agreement if needed, without feeling that there is “no other option!”

This is powerful. It can help settle your team’s emotions, too.
Know your best alternative to a negotiated agreement: your BATNA. Understanding what your best alternative path entails, enables you to evaluate a potential outcome objectively. You will be able to walk away from the agreement if needed, without feeling that there is "no other option!" This is powerful. It can help settle your team’s emotions, too.

“If it doesn’t work out, these are some of other options.”

“This is what we’ll do instead.”
Get the right people at the table.

Do you have the right voices at the table?

Is there the appropriate representation of viewpoints to enable a balanced discussion of impact?

Thanks for lining this up! Before moving this forward, I wanted to ask if you would consider additionally inviting an attending physician who works on the unit to this meeting? The current members include 3 nursing leaders and only one resident. This mix may not allow a balanced discussion when we get into considering what solutions we can work out. I feel it would be essential to have input from a physician who works on the unit and who is not a trainee.
Do your research!

Anchor on data.

Don’t lowball – it degrades the legitimacy of what you bring to the table.

Show that you understand the situation or the market value. Present a flexible range or array of options.

If the counteroffer does not seem reasonable, ask for more understanding.

*Can you help me understand how you got to that number. And how is it fair?*

*If there's a way to make this work, I really want to do it. But I need more options.*
How is your energy and attitude in a negotiation with... a resident physician? vs a Department Chair?
Attitude matters.

Be positive.

Help others relax.

Your bosses are human too!

It doesn’t matter if you are negotiating up or down!

A positive and collaborative attitude
• lowers anxiety for both parties
• signals you are open to hearing needs, exploring options, problem solving
• helps the other party open to your needs and a broader array of solutions
Seek first to listen and understand.

This starts before the conversation. Seek to understand what is important to the other party.

your common ground
Challenge your minds to stay open and seek a mutual solution.

my needs          their needs

Impasse?

Ask again. Listen again.

When emotions run high, we look for win-lose solutions. But are there options that meet both party’s goals? The only way to do this is by deepening your understanding of:

• What is important to you?
• What is important to the other party?

It sounds like what you really need is... I wonder if there are other ways we can achieve this? I would able to ____ if we can ____.
Understand your common ground and motivate the discussion around that.

Acknowledge options while opening both of your minds to others.

Emphasize what you are prepared to offer toward your common goal.

I’d like to help the unit achieve our patient safety goals, and one of the challenges we face is that . . .

That’s an option. But it doesn’t address ___. Can you help us with that?

Our team is excited about the safety initiative and has set aside time each month to ___. If we can get the ___, we will use it to . . .
Email is a dark place for sensitive conversations.

When the email gets beyond two paragraphs. . .
When you feel nervous about hitting “send”. . .
When you feel totally vindicated as you are about to hit “send”. . .

. . . Save that thought and change the plan!

email length inversely proportional to how well you know someone

Consider instead the email to set up a conversation.

*I’m hearing ___. I’d like to talk with you about ___*. May we set up a time to meet?

*I think it would be valuable to talk about this. I’ll reach out to your admin to line up a time to meet. If you prefer otherwise, let me know.*

My lesson learned!
Know when to separate and take your BATNA.

Good negotiation cannot solve everything. Knowing when to walk away (or lead your team away) is essential.

Can be hard when we have invested a lot.
Negotiation is **not** about winning or losing.

It is thoughtful exploration of collaborative options, followed by a **choice**.
Establish a follow-up plan with concrete goals and a timeline for follow-up.

I think we’re in good shape to get started!

Could you find out about ___ and let me know when we ____?

I will brief the team and start the intervention once I have your _____.

Shall we meet again in November to see if this plan is working? By then, I will have met with the team and reviewed the data from the summer. I’ll find out from them about any challenges along the way. I’ll be sure to ask about your concern that ___. 
But, we’re not done yet. We need to talk again.
Many negotiations and discussions occur longitudinally.

Additional complexity in modern times:

email and phone components in addition to the face-to-face meetings
different players involved asynchronously . . . people may be missing from key meetings, but having discussions in parallel.

We need to have some way to follow the conversation, planning, and accountability. Lead the way.
For recurring meetings, consider a shared agenda/notes space.

we build the to-do board together: tasks are transparent and all are accountable.

engage team: anyone can set agenda, not just the leader.

doubles as meeting notes, visible to whole team; establish mutual understanding.

Link to Running Agenda/Notes added to all email correspondence and digital calendar events sent.

[Team Name] Running Agenda/Notes

To Do Board

[X] TWR - review policy changes, then schedule meeting with SLH to discuss
[ ] PS - install microphone in office
[ ] TWR - draft holiday pay description letter

Next Meeting

For Discussion (Larger items)
[any team member can add items here]

Brief Updates (Smaller items)
[any team member can add items here]

Done from prior:
[X] - TWR - make call schedule spreadsheet
[X] - SLH - discuss committee funding with Chair
[X] - PS - schedule resident fall lunch

8/24/19

For Discussion (Larger items)

New Journal Club Format.
This was successful overall.
Clearer guidelines desired by residents.
Brainstorm ways to increase emphasis on research methods.
Encourage research faculty attendance?
Share one teaching point on statistics or research design each session?

Brief Updates (Smaller items)

New policy on travel has been posted.

I like a protected Google Document.
You got this!

- (positive) attitude matters
- be realistic and legitimate
- fight the “urge to win”
- listen to understand
- find common ground
- breadth array of options
- find common ground
- research your alternative(s) - BATNA
- invite the right people to the table
- beware email
- anchor on data
- know when to take your alternative (BATNA)
- establish a follow-up plan
- be accountable and ask for accountability
Useful Resources

**Book:**

**Leadership courses I have taken and recommend:**

Successful Negotiation Skills and Strategies by KiThoughtBridge
[https://www.kithoughtbridge.com/](https://www.kithoughtbridge.com/)
Thank you to: Irma and Katherine Tyler-Wood

Crucial Conversations Workshop
Thank you to: Lori A. Aemisegger, VitalSmarts Master Trainer

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University of Michigan Leadership Academy
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