

## *The Preparation Principles Checklist*

<p><b>CHALLENGES YOU FACE</b></p>	
<p><b>SITUATION SUMMARY</b></p>	
<p><b>OBJECTIVES</b>  <i>Define your goals. What would you like to accomplish in this transaction or in dealing with this challenge?</i></p>	
<p><b>PRECEDENTS</b>  <i>Transactions or experiences that can influence the outcome or provide a model for guidance. What have you or others done to deal with similar situations? What are some examples of results from those situations?</i></p>	
<p><b>ALTERNATIVES</b>  <i>What are the various outcomes you want to consider? To what degree do they satisfy your objectives? What could happen if things don't work out? What are their options if the other party chooses not to work it out with you?</i></p>	
<p><b>INTERESTS</b>  <i>What objectives or desires does the other side have beyond their stated positions? What do they want – need – that you might be able to address?</i></p>	
<p><b>STRATEGY/NEXT STEPS</b>  <i>What is your plan? What steps does it involve? When and how will you probe?</i></p>	

<p><b>TIMELINE</b>  <i>Lay out the time period during which you want to accomplish your objectives. When can you be expected to accomplish the steps in the process outlined in your strategy?</i></p>	
<p><b>TEAM</b>  <i>Are you doing this alone or with others? What is everyone's role?</i></p> <p><i>What do you know about the other side's participants? Biographical information? Authority? Personalities?</i></p>	
<p><b>SCRIPT</b>  <i>Write out the message or proposal you want to make. Include probing questions and hypotheticals. Share it with a team member or associate acting as your devil's advocate. Once you are satisfied, build confidence in delivering the hard message with practice.</i></p>	

The form provides a format for organizing ideas to help you set a strategy for challenges and transactions in your life. It is not intended that you fill in this form with every piece of information at your disposal. Instead, provide bullet points that will serve to enable you to talk more efficiently with others when discussing the situation. You should not feel that you need to write a complete answer on the checklist itself. But you should be able to provide that answer when asked questions generated from someone's review of the bullet points on your planner checklist.