



Hands-on Negotiation-Excellence Workshop **Applying Harvard University Global System™ Tools**

**Blending the Science and Practice of Formal and Informal Negotiations
for Executives, Team Leaders, Lawyers, Buyers, Sellers and Other Professionals**

2016 Workshops

Boston, November 16-18
New York, November 9-11
Ottawa-Gatineau:
- September 12-14
- November 28-30

So let us begin anew—remembering on both sides that civility is not a sign of weakness... Let us never negotiate out of fear. But let us never fear to negotiate.

President John F. Kennedy

PARTICIPANTS' FEEDBACK

“For several years, our teams have applied Harvard University Global System™ tools learned during this workshop. The method was used successfully to orchestrate the turn-around of North-America's fastest growing casualty-insurance firm, and to craft a vision and strategic direction of Desjardins, a \$75 billion financial institution... e.g., I use the Factional Analysis to assess each party's interests in high-stake negotiations.”

**John Harbour, President
Desjardins Group (retired)**
(Bloomberg ranks Desjardins Group world's 2nd strongest bank)

“I have worked with Alain on many occasions to improve strategy and execution, and coach my management team. I also attended his leadership and negotiation training program. A remarkable strategist with the typical rigor and discipline of a professional engineer, he has helped me reframe and solidify our strategy to deliver key business outcomes... Great coach, I owe him a lot.”

**Gilles Morin, Vice-President
Export Development Canada**

I. LEARNING OBJECTIVES

Mastering the skills to excel in formal and informal negotiations is vital to success in most professions. In this workshop, you will acquire the practical competencies, best practices and proven Harvard® tools to forge durable agreements, build trust and allies for repeat business. These competencies and tools are invaluable to lead and manage resistance to change, buy or sell equipment or property, prevent or settle disputes and conflicts, seek a raise or a promotion, retain talent, finance projects, excel across cultural settings, license a trademark or a patent, chart a clear responsibility or opt for a gracefully exit, if appropriate.

The workshop focuses on proven ways to understand each negotiating party, prepare, enlarge the pie and create and extract a superior value to what can be gained by compromise, coercion, arbitration, court and other means of dispute resolution. You will be skilled to juggle with last-minute demands, pricing intricacies, concessions and other conditions used by shrewd negotiators. You will refine your ability to close better deals and build lasting relationships and a reputation for being competent, dependable, caring and ethical both within and outside your organization.

Through interactive case studies and role-playing scenarios, you will practice negotiations of increasing complexity to build partnerships; craft offers and counter-offers; turn objections into opportunities, manage deadlocks and biases; disarm your opponents ethically; and make it difficult for them to withdraw from a reasonable deal.

More feedback on pages 5 and 6.

II. WORKSHOP OUTLINE (2.5 DAYS - 2 CEU)

1. Practices and Pathways to Negotiation Excellence

- Positional versus interest-based negotiation
- Roger Fisher's workout exercise and lessons
- Harvard® proven toolkit for strategic negotiations and daily referral
- Leaving money on the table: Early warnings
- How to plan closure setting the critical milestones for a high commitment

2. Prepare: Discern the Issues from the Stakeholders

- Three proven tools to understand and validate the stakeholders' interests
- Proven tips and demonstration to uncover dishonest claims
- New insights into issue-incubation pathways

3. Crafting a Clear Negotiator Mandate: Theory & Team Practice

- Interest-based deals: How to validate each party's goals, scope, conditions beyond each party's control and risks
- Harvard® Negotiation Mandates: Teamwork to draft one for each negotiation party
- How to prevent role conflict: Harvard® Responsibility Chart

4. Skills and Breakthroughs Tools to Invent Options for Mutual Gains

- Critical success factors to invent mutual-gain options
- How to pivot from problems to opportunities
- Innovative and proven toolkit to navigate from issues, stakeholders and interests to options, strategy, deliverables and benchmarks
- Harvard® Creativity Grid: 3 Real-life cases that left NO money on the table
- Innovation role-playing: Brainstorming and validating creative options
- Video learning: How to legitimize your arguments with verifiable benchmarks

5. Skills to Ensure a Sustainable Commitment

- How context, timing and communications affect commitment
 - Building your power of influence in context: Options from soft, synergistic to defensive power
 - How to hitch hike on the power of others
 - Negotiating without the benefit of authority to enforce decisions
- Intermediaries: When and how they help; international trademark-license case
- How to control your emotions and deal with dysfunctional, harsh and obtrusive negotiators

6. Maximizing Opportunity while Mitigating Risks:

The Best Alternative to a Negotiated Agreement (BATNA)

- Risk-identification, tolerance and mitigation tools
- BATNA exercise; secret Walk-Away Price (SWAP) and contingency reserve for residual risks and worst deals (WATNA)

7. Terms and Conditions: Negotiation-Dance Tips and Exercises

- Howard Raiffa's tips on reservation prices and zone of possible agreement (ZOPA)
- Negotiating a service or a property: Martin's QQTLE benchmarks
- Exercises in pricing, bidding, auctioning, concessions, counter-offers, and advanced pricing tips to avoid a race to the bottom
- Tackling last-minute demands: Ranging from splitting the difference to deal-breaker threats

- Framing, escalation, soft money and other tactics
- Selling and buying terms and conditions: From simple one-shot deals to complex repetitive transactions with powerful suppliers, clients and governments

8. Closure: From Forging a Sustainable Deal to Opting for a Graceful Exit

- Steps to build trust, avoid deadlocks and inadequate closure. Foundation for sustainable relationships
- Role-playing multiple Parties and issues with Harborco case study
- Tips to break an impasse and prevent deadlocks
- Dealing with emotions, gambits, ploys and hostile attacks
- Deciding if and when to walk away
- Issue of fleeting coalitions and illusion of validity
- Phone, e-mail and virtual-negotiation tips
- Going beyond closure to address execution (the Achilles' heel of most deals) with Harvard® planning and tracking instruments

9. Synthesis & Conclusion

- Harvard® Proven Toolkit for Negotiators and Professionals
 - Practical road maps, checklists and templates for strategic negotiations and daily referral
- Timeless lessons from Fisher (Getting to Yes), Mnookin (Bargaining w. the Devil), Susskind (Negotiating More Effective Global Agreements), Ury (Getting Past No), Lempereur (First Move) and Yann Martin
- Personal 90-day action plan to practice the negotiation skills and nuggets worth sharing with your peers and allies

III. WHO SHOULD ATTEND?

Executives, team leaders, buyers, sellers, lawyers, senior assistants and other professionals who must influence without the formal authority to enforce decisions. Participants come from business, trade associations, foundations and governments.

IV. WORKSHOP LEADER: Alain Paul MARTIN



Alain Martin, Harvard ALI Think Tank, Shanghai

A Harvard Fellow (Advanced Leadership) educated in the science and practice of strategy, negotiation and team leadership (Harvard Business and Law Schools, Concordia, MIT), Alain Martin is a board member in the USA, Canada, Europe and Japan. He works mostly behind the scene to improve innovation quality, capacity and velocity by coaching executives, team leaders, scientists, negotiators, marketers, lawyers, intelligence analysts and executive assistants. An inventor who held patents (USA, Canada, Japan), Alain is the Chief Architect of Harvard University Global System™, the innovative framework and toolkit applied in strategy formulation, principled negotiation, project management and products/service incubation, design, prototyping, development, production, value extraction and client retention.

Alain has advised two prime ministers of Canada (4 years), the UNESCO's Director General, the CEOs of biotechnology firms (BiokPlus), financial institutions (Desjardins community bank and casualty-insurance subsidiary for 10 years) and progressive unions (APOC-AOPC). He held risk- and IT-management positions at Du Pont, Bombardier, Domtar and CBC-SRC. He was twice a faculty member at the University of Quebec where he taught negotiation and change management in the M.Sc. and MGP Project-

Management programs and Led assignments where sensitive multipartite negotiations were of paramount importance, including: (a) the incubation of the Canadian Food Inspection Agency with Dr. Brian Morrissey; (b) a brainstorming retreat with Health-Canada's executives and medical professionals to prepare a risk-management strategy nine months before Mad Cow was diagnosed in Canada (c) a proposal to the Prime Minister on defusing the growing tensions between Canada and its Asian trade partners, particularly Japan, following the discovery of mad-cow disease in Alberta in 2003, (d) the merger of five agencies mandated to protect investors, maintain the integrity of securities markets, and regulate financial institutions in Quebec, (e) the creation of a trilateral cooperation network to mobilize Canadian talent and know-how with petrodollar financing (Kuwait, Abu Dhabi) for the benefit of the poorest nations in Asia and Africa; (f) the coaching of leaders of the First Nations in British Columbia and those of the Sakha (Yakutia) Republic to apply principled negotiation in working with their respective federal governments.

Alain has worked with Boeing, Bombardier, Cap-Gemini, E.ON (world leader, wind energy), GE (USA, Canada, Europe), France Loisirs, Textron's Bell Helicopters, Desjardins (Banking, Insurance), Foro de Excelencia (Spain), IEEE, governments and Sweden's Skanska and Boliden. He led seminars for IEEE, PMI, operations-research societies (INFORMS, CORS), the Ivy-League's Leadership Summit at Harvard, and Japan's Engineering Advancement Association, METI, APEO, the last two [International Forums of Excellence in Spain](#) and the UN University in Tokyo. Early in his career, Alain led international capital projects ranging from inter-city microwave links to roads and bridges, funded by CIDA and the World Bank.

In mining, oil and gas, Alain advises the government on large-scale risks in Canada's North and Arctic since 2014. The year 2016 marks the 20th anniversary of his strategic and project-management cooperation with the senior management and scientists of Teck Metals' Applied Research and Technology Group.

Alain was selected as a 2012 Harvard Fellow in Advanced Leadership (ALI) with peers committed to address important issues including the environment, health, education and governance. During his fellowship, Alain honed his expertise in large-scale risks, mentored and delivered leadership seminars to Harvard University's and other Ivy-League's students and led the incubation of a complexity-reduction lab.

Alain graduated in Commerce (Quantitative Methods) from Concordia University and is a Harvard Business School's alumnus in entrepreneurship (OPM, 1997-1999). He fine-tuned his skills in management of change and social psychology at MIT and the Gestalt Institute of Cleveland. He is also certified to teach negotiation in the corporation by Harvard Law School where he was privileged to learn from Robert Mnookin, Lawrence Suskind, Bill Ury, Bruce Patten and the late Roger Fisher.

Recognized by the Project Management Institute (PMI) for "his outstanding contribution to the state-of-the-art of project management", Alain was also honored by the Presidents of Harvard University and Harvard Alumni Association for his "Leadership, Vision and Service" to Harvard community. He is the author of the book titled "[Harnessing the Power of Intelligence](#)" which was recommended by [leading scholars, corporate executives and the competitive-intelligence community in Fortune 100 companies, the Chief of the Defence Staff of the Canadian Forces and the Office of the Chairman of the Joint Chiefs of Staff of the US Department of Defense](#). Building exemplary teams and leaders is the subject of Alain's upcoming book.

Alain's pro-bono work focuses on funding and providing advice to advance health, education and poverty reduction. He is a founding sponsor of Roger Fisher House, a conflict-resolution catalyst that is now part of Mercy Corps. He is an Advisory Board Member of both Social Hearts (Japan) and New York's Build Academy (formerly Open Online Academy) for global education in architecture, engineering and construction. Inspired by Drs. Jim Kim and Paul Farmer, Alain led the creation of Partners in Health Canada

by mobilizing resources to (a) incorporate PIH as a charitable organization; (b) link PIH to strategic allies and philanthropies; (c) host funding events and (d) manufacture and deliver a fuel truck for PIH clinics in Haiti. He led funding projects for the victims of Haiti's earthquake, Japan's Tohoku earthquake and tsunami and Hurricane Sandy (with the support of French Embassy in Washington). He also orchestrated initiatives for CHEO Children's Hospital, Food Banks, Canada Without Poverty and led three times Harvard's Global Month of Service.

V. PARTICIPANTS' FEEDBACK

"With a first-hand experience and Harvard-University education, Alain Martin understands the fleeting-coalitions dynamics and the subtleties of context, wording and tone. He helped financial institutions get the best of the NAFTA, played a role in crafting cooperation between several countries and forged strategic-partnership agreements in the business world."

Danièle Testelin
Diplomat & Senior Advisor, CIDA

"Well-structured framework to effective competitive intelligence, strategy formulation, risk management, negotiation skills and successful leadership. This valuable seminar bridges the gap between theory and practical wisdom, and complements other frameworks and disciplines. The workshop leader Alain Paul Martin is excellent, humble and sincere."

Zakaria Radwan-Kamaly
Manager, Credit-Risk Standards
Export Development Corporation

"The tools and strategies provided by this course will be of practical use in all aspects of my work! Powerful tools delivered by a leading-edge instructor! Many thanks!"

Carl Finnis,
Project Manager
Customs & Revenue Agency

"Very knowledgeable instructor who teaches this seminar with a dedication and passion. This course is an important tool for managers. Everything was well-coordinated!"

Raja Kadri,
Senior Policy Analyst
Natural Resources Canada

"I found this to be a content-rich course with a real world focus. It has changed the way I approach strategic thinking and has significantly added to my risk and negotiation tool chest."

Mark Maltais, Manager
Risk Assessment, CDIC

"I enjoyed acquiring new ideas in strategy formulation, negotiation skills and leadership. The exercises and simulations gave a good hands-on practice."

Savi Sachdev
Director General, Space Systems
Canadian Space Agency

"Very focused seminar on practical and innovative tools that are of great value and are uniquely delivered."

Wassim Labaki,
President & Chief Engineer
Advanced Manufacturing Processes
Robotic Systems

"The most thought-provoking and insightful sessions on management issues I have seen in 25 years of military and public service experience."

Alan Stewart
Sr. Project Manager. Aircraft Certification
Transport Canada

"I found this workshop to be highly educational, interesting, interactive and useful."

Tim Georgeoff
President & CEO
CAA North & Eastern Ontario

"This excellent seminar is appropriate to our work-environment and context. It also provides practical tools that help you reach your personal and professional objectives."

Renald Breton
Senior Advisor, Desjardins Trust

"The seminar provides an excellent opportunity to learn with a diverse group of bright individuals at a senior level. Alain Martin was a dynamic and engaging leader."

Mary D'Alton, Managing Director
The Waterloo Inn & Convention Centre

"One of the most useful seminars I've ever attended."

Ray Springer
Senior Policy Analyst, Treasury Board

"Excellent colleague. Very dynamic. An asset in any team! Alain Paul is a plus!"

Josée Touchette, LLL, CPA-CMA, MBA
Chief Operating Officer, National Energy Board

"I Left with new valuable concrete ideas to apply to my projects. Thank you for this incredible learning experience."

Catherine Kerr
Transportation Energy Program Officer
Office of Energy Efficiency

"Alain Martin's real-life examples and experience add so much value to the learning experience that it made the learning material much easier to understand."

Michel Firlotte
IT Project Manager, Health Canada

The following excerpt is from Dr. Paul Famer's recommendation of Alain Martin.

"Mr. Martin tirelessly invests his energy to leverage his successes and networks into solutions that have a direct, positive impact on the poor... Mr. Martin's management background and extensive experience in advising global leaders, alongside his motivation to eradicate poverty and its ill effects, qualify him to make a uniquely valuable contribution to addressing inequity on a societal level. With demonstrated skills in entrepreneurship, negotiation, and issue analysis, he is precisely the sort of thoughtful, versatile leader we need to advocate on behalf of the poor and underserved."

Prof. Paul E. Farmer, MD, PhD
Chair, Global Health & Social Medicine
Harvard Medical School
Chief, Global Health Equity, Brigham & Women's Hospital
Co-founder, Partners In Health

"I congratulate you on delivering a very professional seminar in a first rate facility. You covered a very large amount of material in the four-day period and I thoroughly enjoyed the interaction with all other attendees."

LCol. Andy Topp
U.K. Ministry of Defence

"Excellent value for a senior manager."

Col. Tom Lawson
Department of National Defence

"Very interesting and fast paced! Not a dull moment."

Rick Leach
Team Leader, Financial Planning
Export Development Canada

"An extremely unique and valuable course with great new tools that can be broadly applied."

Derek Potts
Chief, NHQ Computing Facilities, CIC

"I was privileged to work with Alain Paul Martin at Harvard University, attend his lectures and provide technical support for his research on complexity reduction.

Alain cares deeply about the students he mentors, Harvard staff and his Advanced Leadership colleagues. He is passionate about social justice. His compassion for the less privileged is genuine. Candid to share his mistakes, he welcomes critical scrutiny of his work, listens, validates and acts on suggestions.

A model leader and educator with a touch of humility and captivating public speaker!"

Cochise Pearson, M.Ed.
President Ivy Scholars Success

VI. REGISTRATION: PUBLIC WORKSHOPS

• Tuition Fees

Fees include books, hand-outs, road maps and other course materials of exceptional value (see above), and a daily continental breakfast plus hot and soft drinks during the morning and afternoon pauses, but exclude hotel accommodation (if required).

2.5 days: Regular fees: \$1395; Government: \$1345
Group fees for 3 or more participants: \$1295 per person.

5-day Option: This option includes the workshop titled “Hands-On Project-Management Skills and Best Practices”.

Regular fees: \$2495; Government: \$2445
Group of 3 or more participants: \$2395 per person.

- **How to Register**

Online: Please [click here \(if active\)](#)

or on “Register Now” on the top of www.eharvard.org/seminars/strategy.asp

or Call us weekdays (9 AM - 4:30 PM EDT): +1 819-772-7777

or toll free: 1-800-HARVARD (1-800-427-8273).

Please pay in advance by a credit card or a corporate cheque. Send your cheque payable to: The Professional Development Institute PDI Inc.

Cancellation Policy: Participants registering as a group must send substitutes in lieu of cancelling. For other clients, cancellations are accepted if made at least 10 working days prior to the course, and are subject to a \$150 service charge per person. Full fees are payable by anyone who fails to attend or cancels less than 10 working days prior to the session. One substitution or transfer to a later course of the same duration is accepted.

VII. PRIVATE SEMINARS CONDUCTED IN YOUR ORGANIZATION

We deliver in-house versions of this workshop worldwide to business and governments, NGOs and bar associations and other societies. We would be delighted to work together you're your team anywhere. Ask us for a proposal based on the number of participants, the seminar duration and a selection of cutting-edge course materials and case studies most applicable to your environment.

Our fees are most reasonable. If required to support your request, we would provide supporting evidence for service fees recently billed to governments and companies.

The travel expenses for seminar leaders are on cost-recovery basis. They include airfare, ground transportation, meals, gratuities, airport taxes and hotel accommodation.

There is no travel expense for seminars held in the cities of New York, Boston, Cambridge and Ottawa where we hold regular public workshops. If applicable in your jurisdiction, sales and value-added taxes (HST and PST or VAT) are extra.

The client is responsible for the conference room, audio-visual materials including 2 flip charts, an 8x8 feet projection screen, internet access, a digital projector for PowerPoint presentations and a laptop computer (as a back-up machine). We also recommend round tables, each seating five participants, in a crescent arrangement, to face the workshop leader.