

# Negotiation for Subject Matter Experts

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# Negotiation Roles

- **Business owner**
  - Person who really makes the decisions
  - aka “Stakeholder” or “Buyer”
- **Negotiator**
  - Person who does most of the talking
  - DOES NOT make the decisions
  - aka “Me”
- **Subject matter expert**
  - Person who understands how things really work
  - aka “You!”

# Subject Matter Expert Defined

- **Technical/practical expertise**
  - Understands the ins/outs of the solution
- **Implementor**
  - Responsible for implementing the solution
- **End user**
  - The primary beneficiary of the solution
- **Support**
  - Responsible for supporting the users post-implementation

# Value-Add of the Subject Matter Expert

- **Technical/practical expertise**
  - Knows the technical specifications better than anyone else
- **Implementor**
  - Understands the challenges faced with installation/integration
- **End user**
  - Going to have to spend the most time on the system
- **Support**
  - Can “ping” the vendors tech support capabilities

# Optimally Engaging a Subject Matter Expert

- **Evaluation stage**
  - **WELL BEFORE** a purchase decision is made
  - **Engage the Technical Expert and the End User**
- **RFP (vendor selection) stage**
  - **During the selection of the vendor and/or tool**
  - **Engage ALL types of SMEs**
- **Contract Negotiation stage**
  - **After selection, but before signing agreement**
  - **Engage ALL types of SMEs**

# **MUST Engage a Subject Matter Expert**

- **Evaluation stage**
  - **WELL BEFORE** a purchase decision is made
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  - **During the selection of the vendor and/or tool**
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- **Contract negotiation stage**
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# Subject Matter Expert Communication

- **Communication is KEY!**
- **Communication happens with both sides of the table**
- **Communication is different with either side**
- **Miscommunication can have an associated cost**
- **Learning to communicate is a skill worth the effort**

# Communication with YOUR side

- **Talk with your Biz Owner AND Negotiator well before heading to the negotiating table**
  - **Prepare by re-reviewing the vendor and solution needs**
  - **Understand why they need you at the table**
  - **Clarify your role and their expectations of your presence**
  - **Discuss any hurdles you've identified from your review**
  - **Ask (if not instructed) how to participate in the negotiation**
  - **Determine method for alerting the Negotiator of your need to caucus outside of the room**

# Communication with YOUR side

- **Preparing for the negotiation**
  - Like any other participant, be well rested for the session
  - Arrive 20-30 minutes early for any last-minute prep
  - Prepare any needed demonstrations or presentations
  - Have any technical requirements met (computer or overhead setups, etc)

# Communication with YOUR side

- **Attending the negotiation**
  - Stay alert and “present” for the entire process
  - Take notes
  - Write down any questions you might have based on what you hear
  - Communicate non-verbally with the Negotiator or Business Owner if you hear something inconsistent
  - Interject if necessary

# Communication with YOUR side

## ● Ways to interject

- Ask your negotiator for a bio-break
- Cough once to catch the negotiator's eye
- Use a key phrase or body movement to alert the negotiator

## ● Ways NOT to interject

- Interrupt the speaker
- Directly contradict or challenge either sides' statements

# Communication with YOUR side

- **After the negotiation/follow-up**
  - **De-brief with the Business Owner and Negotiator**
  - **Provide any missing technical/practical information**
  - **Review any questions you had prior to negotiation to make sure they were addressed**
  - **Note any new questions created as a result of the negotiation**

## Communication with the “Other” side

- **Be friendly, but deferential**
- **Pay attention to questions, but let the Negotiator answer**
- **Listen for the Negotiator to ask you VERY SPECIFIC (usually Yes/No) questions and answer as BRIEFLY as possible**
- **Resist the temptation to explain your answer or give more information than is requested by your side**

# How to Invite Yourself to the Table

- **Learn who makes the purchase decisions**
- **Learn who completes the purchase**
- **Making friends with both of these groups usually will instantly increase internal communication exponentially**