

# HOW TO DEVELOP NEGOTIATION POWER FOR INVESTMENT BANKING

CPT Eligible\*

The How to Develop Negotiation Power online training series is a 24 video, 3-part fully online negotiation training developed for investment bankers that teaches 12 powerful tools for addressing negotiation power imbalance and taking back the initiative in your deal-making.

Developed by Neil Orvay and Joe Sevack of Evolution-U, who bring over 60 years of combined investment banking, legal, corporate and entrepreneurial experience, the Negotiation Power series is a unique offering that will help even experienced bankers sharpen their skills and claim more value.

Each of the 12 modules comprise two videos: theory and application. The theory is not industry-specific while application modules have been developed with specific reference to the investment banking sector.



## COURSE DURATION

5 hours total  
Part 1: 90 minutes  
Part 2: 90 minutes  
Part 3: 120 minutes



## \*CPT ELIGIBLE

We expect all parts to be eligible for CPT. We can apply to the relevant governing body where pre-approval is required. Based on course length and content, we expect the total 3-part course to qualify for 5 CPT points.



## BLENDED TRAINING

The 'How to develop Negotiation Power' series is also available as a blended training whereby, after completing the online content, participants attend a two or three hour instructor-led application session. Application sessions can be offered in person or virtually using Webex, MS Teams or Zoom, and are customised to client requirements by use of role play, case study, online knowledge reviews and best practises sharing.

## TRAINERS

### NEIL ORVAY



With over 30 years experience in Investment Banking and as an entrepreneur, Neil Orvay has worked with financial and MNC clients globally for over a decade on communication, influence, sales and negotiation based projects and strategies. A graduate of the London School of Economics, Neil holds an Executive Masters in International Negotiation and Policy Making from the Graduate Institute in Geneva, and has studied negotiation at the Harvard Negotiation Institute. Neil is also a trainer of Neuro Linguistic Programming and a certified ICF coach.

### JOE SEVACK



Joe is a lawyer with more than 25 years of experience advising banks, sponsors, borrowers and issuers on complex debt and equity financings and restructurings, buyers and sellers on mergers and acquisitions and investments, and companies, financial institutions and funds on structuring and governance issues, regulatory compliance and interactions with regulators. He has regularly been recognized by his clients and peers as a leading lawyer in major industry publications, and has practiced at several leading firms including Cravath Swaine & Moore, Freshfields Bruckhaus Deringer, Paul Hastings and Troutman Pepper.

# COURSE CONTENT

## PART 1

🕒 90 minutes

- 1 When and how to use the 5 Negotiation Formats**  
There are five principle negotiation styles. Understanding when to use each and recognising which you are facing, and how to respond to it, is an important step in effective negotiation preparation and operating with negotiation power.
- 2 Negotiation Preparation: The Expansive Approach**  
Negotiation is an information game and effective pre-negotiation preparation using an expansive approach is critical if we are to operate from a position of strength.
- 3 Getting your body language right**  
Your physiology can drive your psychology. A basic awareness of cross-party body language dynamics and how to use your own body language can improve your negotiation style and allow you to communicate with more confidence and authority.
- 4 Getting beyond price**  
What's really driving decisions? It's rarely purely price. The ability to move discussions beyond price and uncover other factors that generate value for the client is a major source of developing negotiation power.

## PART 2

🕒 90 minutes

- 5 Challenge your Assumptions**  
One of the biggest error's negotiators make is to not challenge their assumptions sufficiently. Asking the right questions and developing a strategy to do so both before and during negotiations can swing the negotiation power dial back in your favour.
- 6 BATNA & Bottom Line**  
BATNA is arguably the single most important concept in commercial negotiation. Knowing when to walk away and how to generate more compelling options is at the very core of negotiation power, yet most negotiators spend little to no time considering or developing their BATNA!
- 7 The Constituency Concept**  
We are rarely negotiating only for ourselves. Usually, we represent a hidden constituency and when used correctly, this can be a source of negotiation power.
- 8 The Fixed Pie Mindset**  
One of the most common negotiation failures of inexperienced negotiators is that they adopt a fixed pie mindset. This closes the door to creating value and leaves more experienced negotiators in a prime position to claim more value than their position may merit.

## PART 3

🕒 120 minutes

- 9 Dovetailing Interests**  
The ability to step back from a negotiation and analyse not only what is currently on the table, but also what is off the table, can lead to interests being uncovered which allow us to play comparative advantages in our favour and develop negotiation power.
- 10 Making the First Offer**  
Most people's opinion on whether or not to make the first offer is based on feel and not analysis. Negotiation theory gives us clear guidance regarding this much debated "to do or not to do" and in so doing allows us to negotiate with more composure and authority.
- 11 Using ZOPA to your advantage**  
The concept of ZOPA combines the analysis on BATNA and Making the First Offer. An understanding of the ZOPA provides a robust tool that can be applied in both negotiation preparation and actual negotiation to improve our ability to claim value.
- 12 The Information Game**  
For the final module we return to the principle that negotiation is an information game and deliver additional tools around active listening and strategic questioning to allow trained practitioners to capture more value and operate from a position of negotiation power.

For over 100 testimonials covering Evolution-U's training content, please visit [www.linkedin.com/in/neilorvay](https://www.linkedin.com/in/neilorvay)

**EVOLUTION U**  
Business Psychology for a Better You™

✉ [jessica@evolution-u.com](mailto:jessica@evolution-u.com)  
☎ +852 2201 4545  
🌐 [www.linkedin.com/in/neilorvay](https://www.linkedin.com/in/neilorvay)  
🌐 [www.evolution-u.com](https://www.evolution-u.com)