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KEYNOTE SESSION | FEI DALLAS

Mastering the Art of Stakeholder Communication and Negotiation.

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CHRIS VOSS, FORMER FBI HOSTAGE NEGOTIATOR

**Negotiation is nothing
but communication
with results.**



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You are a public
company Finance
leader hiring a
Senior Accountant
in 2025...

A close-up photograph of a file folder tab. The tab is made of light brown cardboard and has a white rectangular label with the text "Job Descriptions" printed in a grey, sans-serif font. The background is a blurred office setting with other file folders in various colors (yellow, pink, purple). In the top right corner of the image, there are two overlapping squares: a teal one on top and a dark red one on the bottom.

Job Descriptions



Discussion Question.

What are the “**must haves**” for your Senior Accountant role?

From a Real Job Description:

- Experience with SEC reporting (10-Qs/10-Ks) or public company audit
- Public accounting experience (Big 4 preferred)
- CPA or in process
- Proficient with MS Excel – Pivot Tables, V-Lookups
- US GAAP knowledge
- **Experience interacting with business leaders**



The **Must**
Haves.

Traditional Definitions of Hard & Soft Skills.

Hard Skills

- Technical skills
- Job-related knowledge or training gained through life experience including career and education
- Average half-life of skills is now <5 years; 2.5 years for tech skills (BCG)

Soft Skills

- People skills
- Personal habits and traits developed throughout your life that shape how you work independently and with others
- Soft skills are actually hard – and many hard skills are soft

Let's hear Adam's story.



AI Automates the Numbers. You Elevate the Meaning.

Adam's story is a common one.

AI and other digital tools mean **less time** compiling and calculating and **more time** analyzing and communicating.

The new must have skill for accountants?

"Experience interacting with business leaders"



The Finance Leader Role

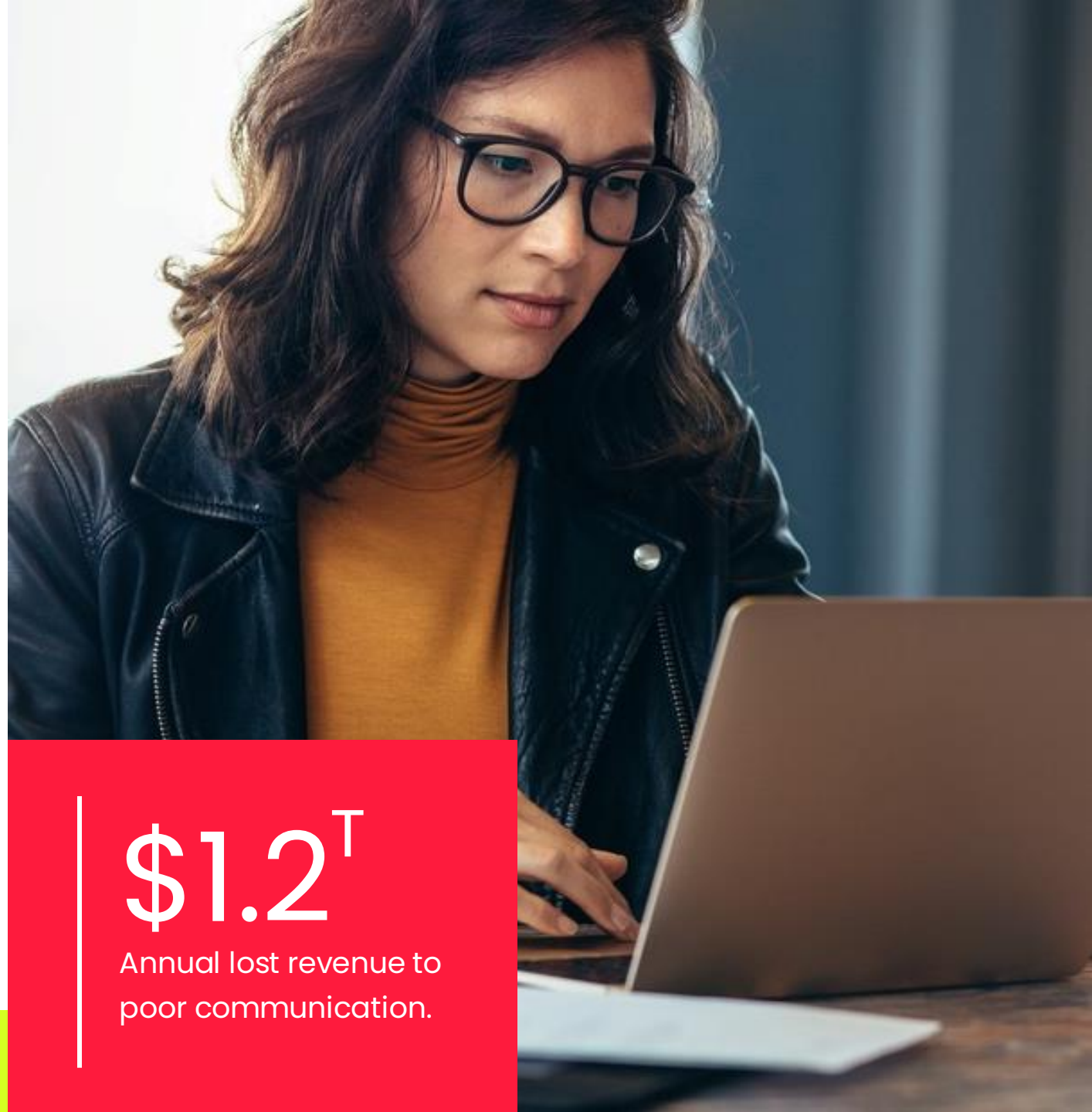
Modeling and developing your team's human skills around communication and negotiation (interacting with business leaders) is now an imperative.



Human skills.

The Cost of Poor Communication.

- **7.47 hours** of work per week lost due to poor communication
- **~\$12,500** cost per employee per year



\$1.2^T

Annual lost revenue to poor communication.

If negotiation is **communication with results** ... communication without negotiation is **conversation without outcomes**.

Every time we schedule a meeting, decide where to eat a family dinner, or set a bedtime with our kids...we're negotiating.

A man and a woman are sitting at a desk, looking at a laptop screen. The man is pointing at the screen. The woman is looking at the screen with a slight smile. The background shows a window with a brick wall and a red wall.

Negotiation
is Natural.

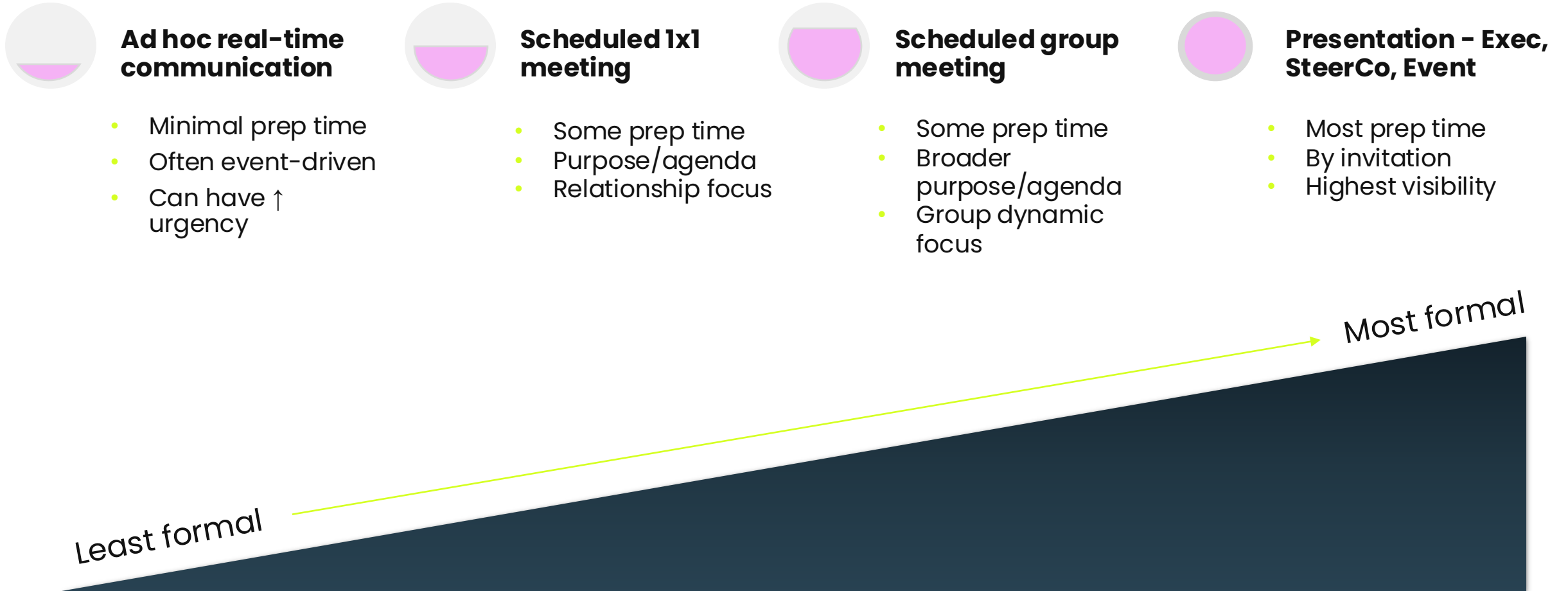


Discussion Question.

What part of stakeholder communication and negotiations do you find most challenging?

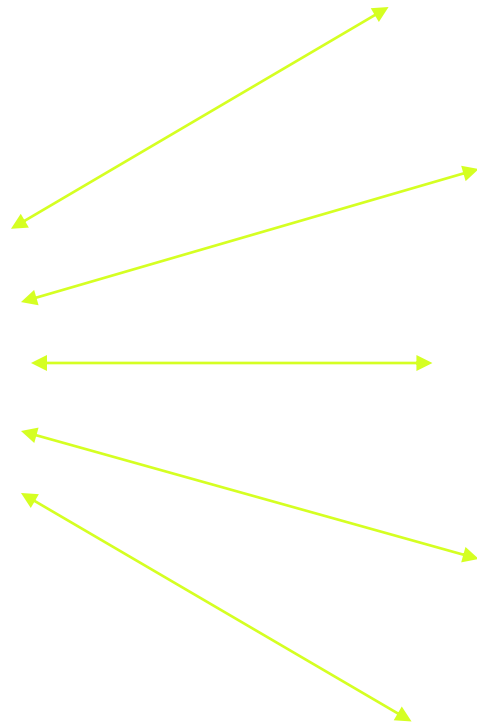
- Speaking/presenting to a group
- Choosing the content to include
- Managing stakeholder disagreements
- Answering questions in real-time
- Getting your audience's attention
- Achieving buy-in/your desired goals
- All of the above

Stakeholder Communication Spectrum.



SCORE your Stakeholder Communications.

SCORE applies across the spectrum - the more formal the interaction, the more time you'll spend in each step - Examples later!



**Start with
why.**



Start with why (set your goals).

- Set a clear purpose and goal
- Consider writing a goal statement

Ex: Our goal today was **to influence** how you think about **skills** and recommend specific ways to **develop** your **human skills** around **stakeholder communication** and **negotiation**.



Negotiation Philosophy.

Negotiation is a phase within a communication that determines the outcome.

- A vendor shares their product enhancements, then presents renewal pricing that reflects the value of those enhancements.
- In an internal meeting, two different teams are deciding how work will get done on a shared project. One team leader praises the other team's analytical skills, then suggests that team handle the analysis work.
- Positioning directly impacts negotiation performance.
- "Words matter...sequence matters..."



Consider your audience.

Key questions to ask yourself:

- If there are multiple people in your audience, consider each one and the group as a whole.
- What role(s) do they play in the organization?
- What level(s) of leadership do they represent?
- What do they care about most?
- What do you already know about them (based on other meetings/observations)?
- If your goal is to influence or to ask, who are your likely supporters and detractors?
- Is there anyone who can help you better understand your audience?
- Are there members of the audience or other influencers you need to talk to *before* the meeting?



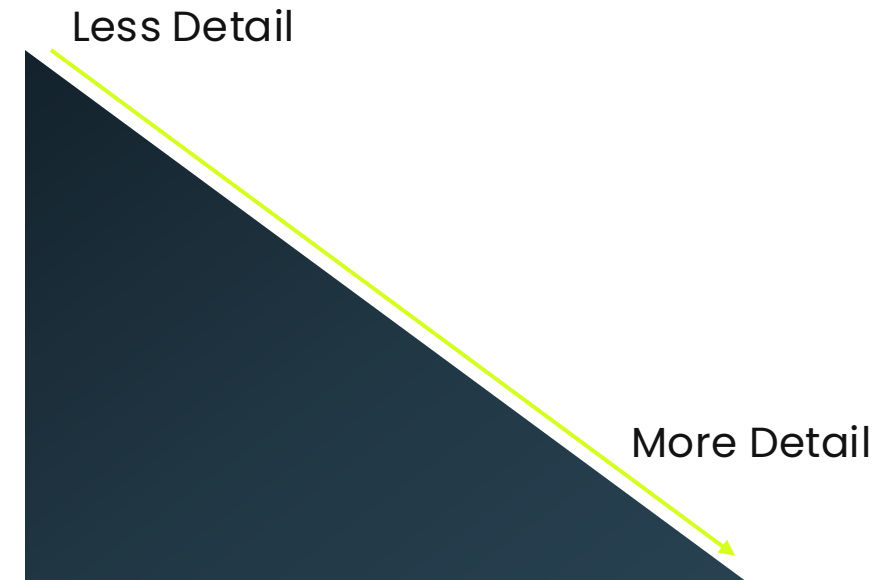
**Articulating
Value.**

Consider your audience.



Consider your audience: Leadership Perspectives.

Leader	Perspective
C-Suite	Set the vision; 5+ year horizon
VPs/Segment Leaders	Run part of the business, set the strategy; 3-5 year horizon
Directors	Oversee the strategy; 1-2 year horizon
Managers	Responsible for team goals and achievements; 1 year horizon
Team	Responsible for executing work to meet team goals; <1 year horizon



Regardless of your audience, **pause frequently** (~ every 5 minutes) to ask for questions or input. It is always better to give a basic introduction and then **allow your audience to determine where to go deeper**. You will come across as **well-prepared and tuned in** to your audience's priorities if you give them options.

How will you articulate value?



Ask yourself three questions...

1. What would you suggest?
2. What would it take for you to agree?
3. Can you live it?

Clarity leads to informed decisions, and it starts with **you!**

Common Mistakes Made in Articulating Value.



Severity of the problem
is not understood



Stakeholders not clear on our value
proposition



No stakeholder communication
between scoping and proposing



We are solving in a silo without
stakeholder support and collaboration



Alternative solutions are not well
understood

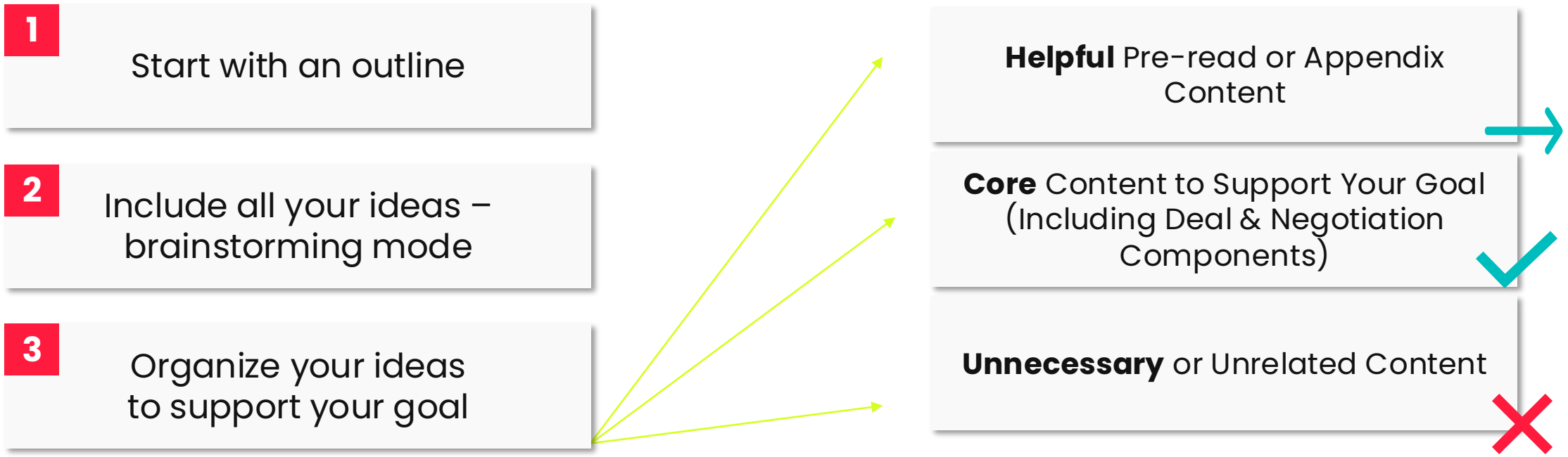


Pursuing an idea that we should not
pursue (foundational question around ROI,
feasibility, etc.)

Outline & Organize.



Outline & Organize (so you can structure the deal).



Structure the **DEAL** Components.

1

Project Plan

Analyze the effort in as much detail as possible.

4

Incentive Structure

Determine deal / incentive structure to optimize price to value across all stakeholders.

2

Cost & ROI

Use pricing tools to layer labor costs on top of the project plan.

5

Approvals / Buy-In

Start lobbying required stakeholder (influencers) buy-in prior to securing authority.

3

Risk

Evaluate your ability to deliver internally vs externally, and associated incentives / risk allocation.

6

Future Phases of Work

Determine if any deal components should be adjusted due to future phases of work.

Understand the **NEGOTIATION** Components.

1

Reservation Value

Also known as RV or the least desirable price before a buyer or seller would walk away.

4

Tradables

Items that increase the ZOPA such as favorable risk allocation, references, first rights of refusal, payment terms.

2

ZOPA

Zone of Possible Agreement is a bargaining range where two parties may find common ground.

5

BATNA

Best Alternative to a Negotiated Deal or the next best thing you do if you walk away (back up plan).

3

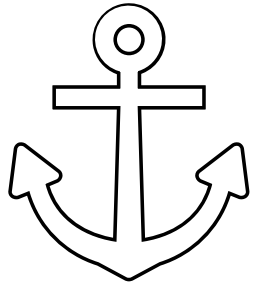
Anchoring

Influencing perceived value proposing an initial offer in a negotiation.

6

Science, Art & Magic

Know your triggers and focus on the science. Negotiation is 80% science.



Anchoring.



The act of positioning the initial perceived value of something (anything) by providing value-related information first (e.g., prices)



What is the value of anchoring throughout deal cycle?



How else can we anchor (beyond price)?

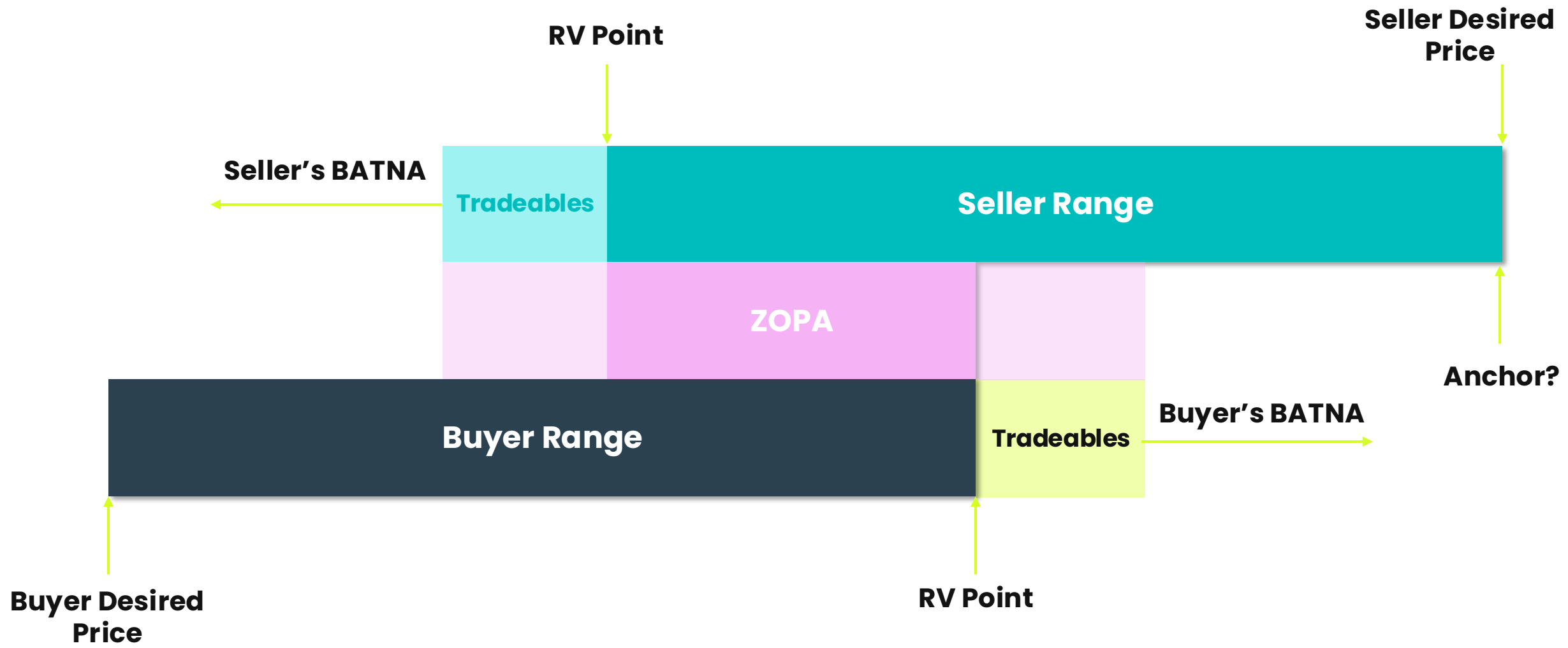


The negotiation starts with our initial pitch...



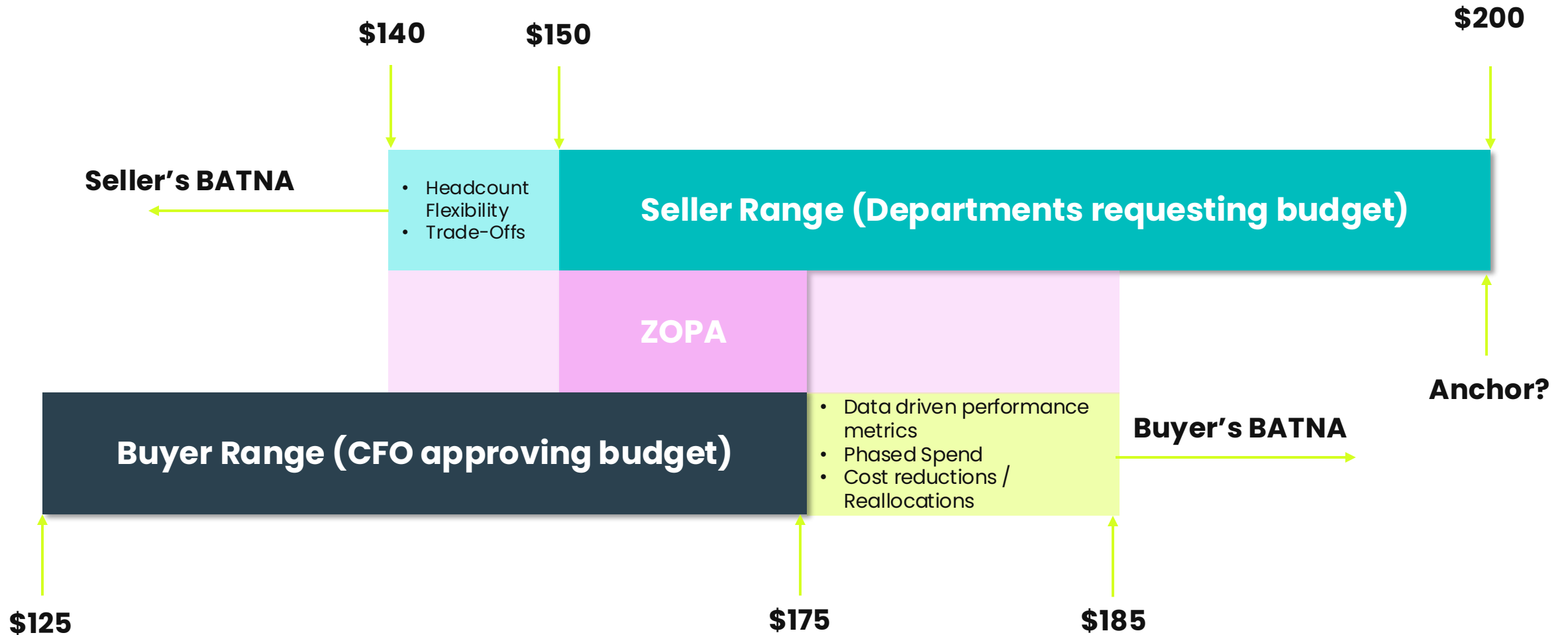
Pricing isn't merely a price tag.

NEGOTIATION Components.



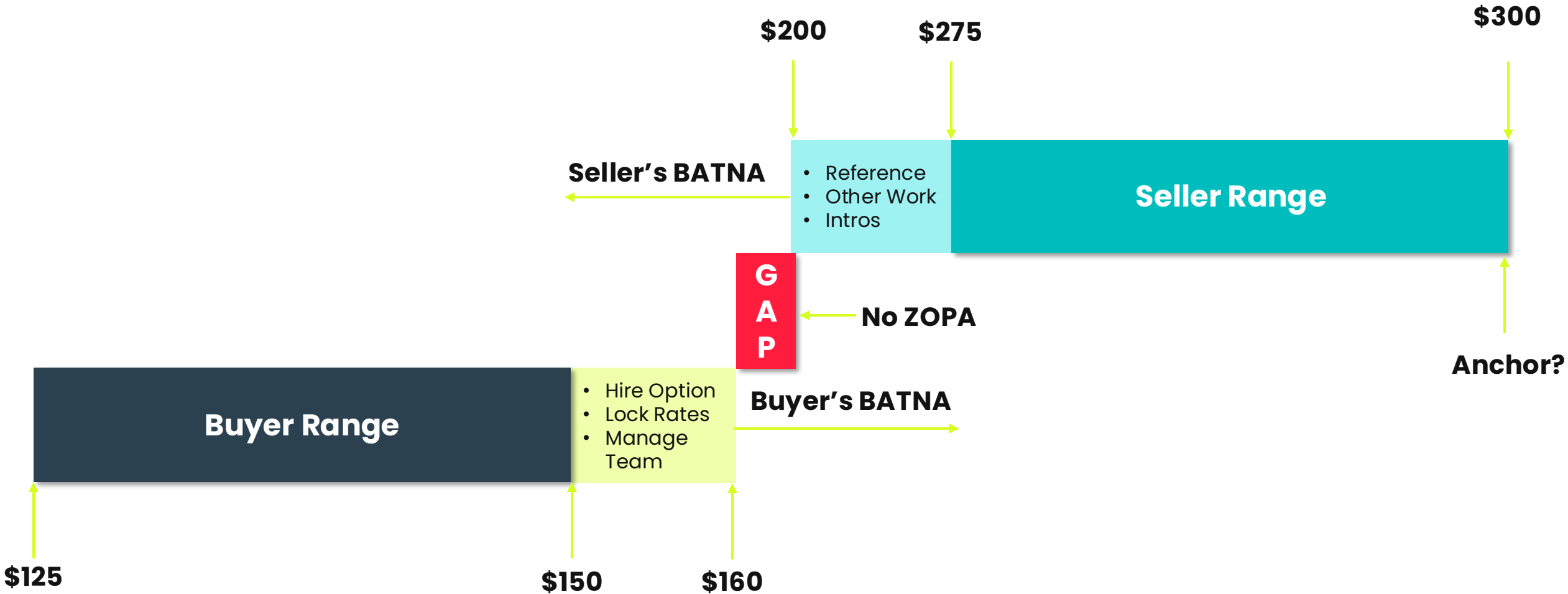
ZOPA = Zone of Possible Agreement
RV = Reservation Value
BATNA = Best Alternative to a Negotiated Agreement

CFO Scenario #1 – Annual Planning.



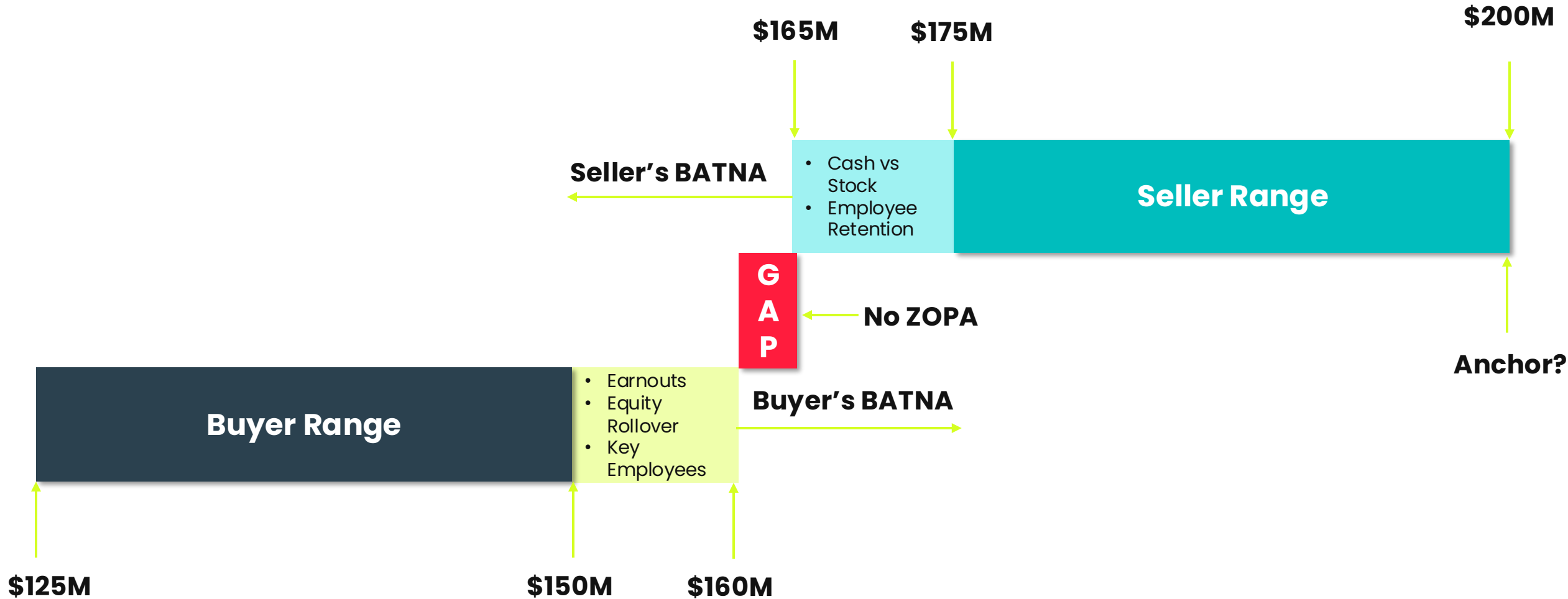
ZOPA = Zone of Possible Agreement
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BATNA = Best Alternative to a Negotiated Agreement

CFO Scenario #2 – Services Transaction.



ZOPA = Zone of Possible Agreement
RV = Reservation Value
BATNA = Best Alternative to a Negotiated Agreement

CFO Scenario #3 – M&A Transaction.



ZOPA = Zone of Possible Agreement
RV = Reservation Value
BATNA = Best Alternative to a Negotiated Agreement

Review & Rehearse.

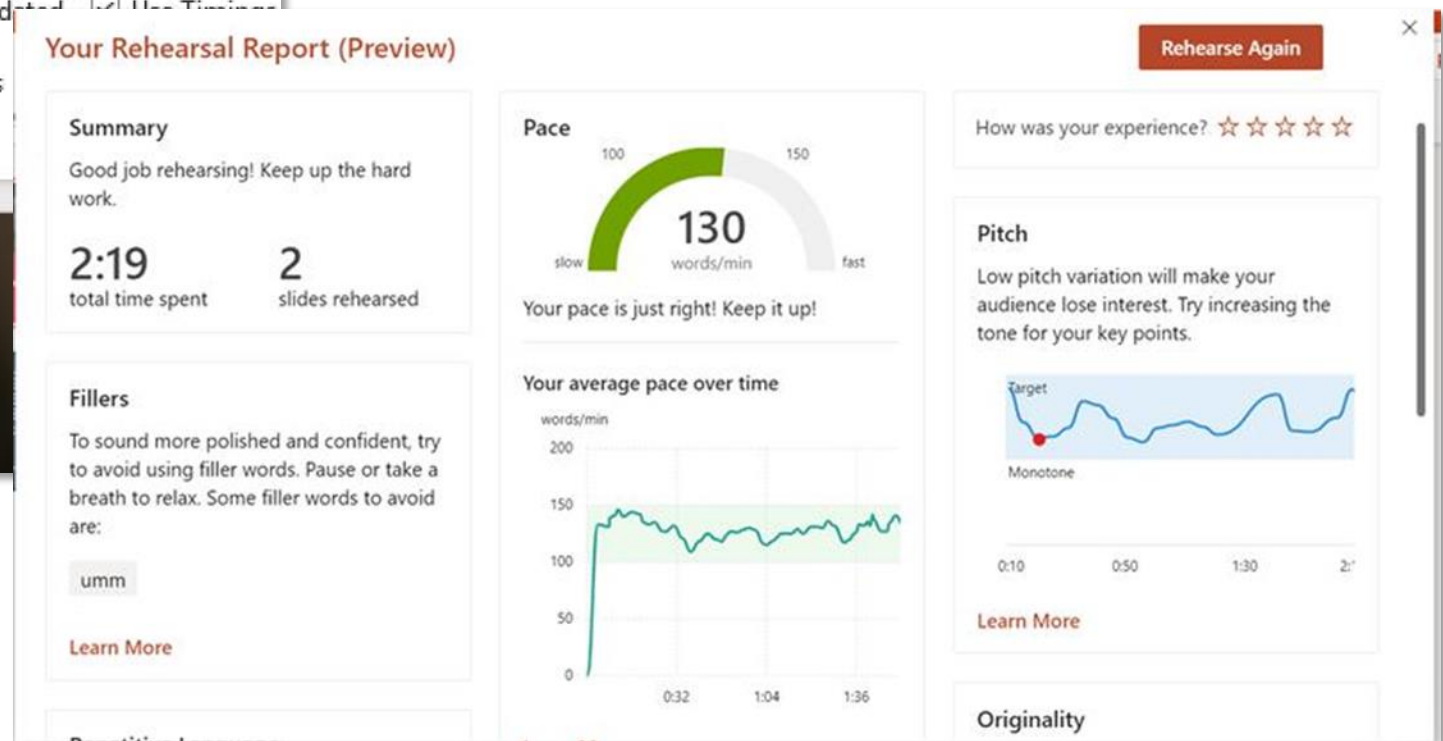
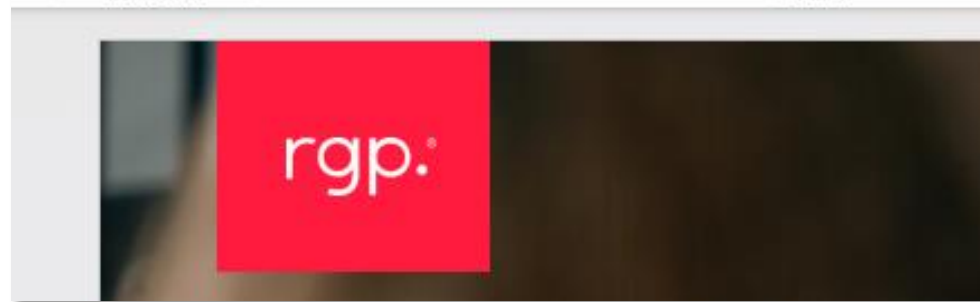


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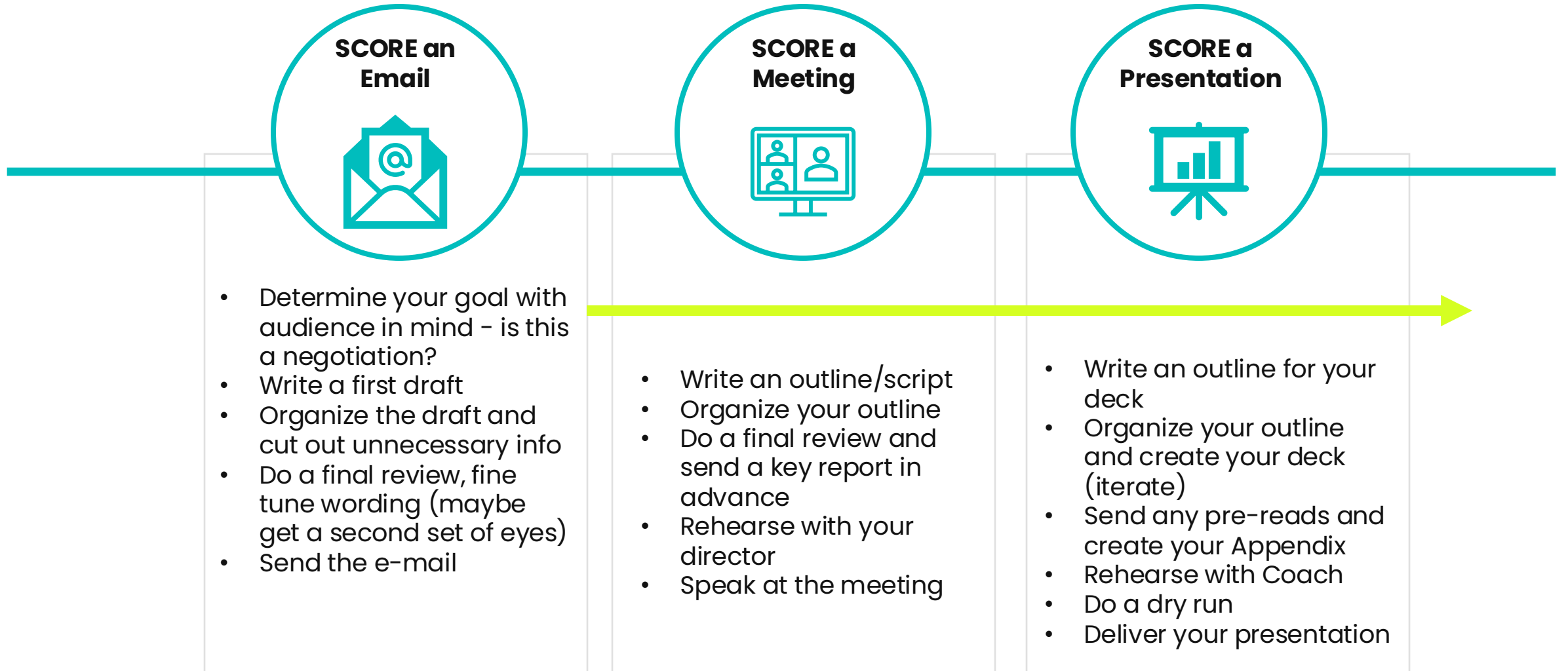
Review & Rehearse (so you can win at the negotiating table).

Fine tune – order, language/tone, visuals
Pro Tip – MS PPT Rehearse with Coach

Write your **script** ... then put it **aside**



Examples.



Execute.



If you've SCOREd, you're ready.

Tips for the **Negotiating** Table

1. Anticipate objections and your response.
2. Use empathy to express concern. "I understand your concern. Are there others? Makes sense. How does this land on you?"
3. Know your Negotiating Components cold because it takes your emotion out of the negotiation.
4. Anticipate Negotiating Components of others.
5. Seek a win for all and tradeables will set you free if you have listened throughout the journey.
6. If negotiations stall, reframe on Value Components not Negotiating Components.





What does an effective negotiating strategy look like in practice?

Move away from “cost” to a perspective based on an exchange of valuables, risks, and incentives.

Takeaways in 1-2-3.

Value > Cost

Action to Try:

- *Flip framing* – in your next budget or vendor discussion, start with the value outcome (“What will this enable?”) before discussing price.

Optimize Risk

Action to Try:

- *Map ownership* – For an upcoming project, identify which risks should sit with Finance, Operations or an external partner – and why, so you can negotiate with clarity.

Slow Down

Action to Try:

- *Pause* – Before responding to a “quick question” – take a moment and thinking about the “why” behind the question. It may completely change your answer.