

NEGOTIATION SKILLS FOR SOVEREIGN FUNDS & ASSET MANAGERS

“Drive Better Deals, Secure Partnerships, and Maximize Asset Outcomes with Strategic Negotiation”

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

This intensive 5-day course is tailored specifically for professionals working within sovereign wealth funds, pension funds, investment authorities, and asset management firms. It addresses the unique negotiation scenarios encountered in fund allocation, external manager selection, co-investments, partnerships, and strategic acquisitions.

Through real-world case studies, simulation exercises, and proven frameworks, participants will build the confidence and skills to negotiate complex financial agreements, optimize terms, manage counterparties, and protect fund mandates—while fostering long-term value-creating relationships

Objectives

By the end of this course, participants will be able to:

- Apply structured negotiation frameworks in financial and investment contexts
- Understand power dynamics in sovereign fund and institutional negotiations
- Develop persuasive strategies for both cooperative and competitive settings
- Navigate multi-party, cross-border, and high-stakes negotiations
- Enhance outcomes through BATNA, value-based arguments, and issue-trading

Why Attend

- Gain negotiation tools specifically suited to institutional and sovereign finance
- Learn to achieve win-win agreements with GPs, co-investors, and fund partners
- Strengthen your ability to lead negotiations involving fees, carry, and term sheets
- Increase confidence in managing cultural, legal, and reputational sensitivities
- Sharpen influence and decision-making in high-value, high-risk environments

Target Audience

This course is designed for professionals from:

- Sovereign Wealth Funds and Pension Funds
- Asset Management Companies
- Investment Authorities and Development Funds
- Family Offices and Institutional Allocators
- Fund Managers, Legal Teams, and Strategic Deal Teams

Individual Benefits

- Improved personal confidence in handling strategic negotiations
- Ability to manage both technical and relationship aspects of deals
- Practical tools for structuring proposals and analyzing counterpart positions
- Enhanced communication and stakeholder alignment under pressure

Organizational Benefits

- Better risk-adjusted deal outcomes and more favorable investment terms
- Stronger fund governance and partner oversight
- Improved long-term partnerships with managers, regulators, and stakeholders
- Enhanced capability to secure alignment across complex stakeholder groups

Instructional Methodology

- Framework Sessions – Harvard negotiation principles, ZOPA/BATNA models
- Case Studies – Real fund negotiation scenarios (e.g., fee negotiation, co-investment)
- Role-Plays – Simulated institutional negotiation scenarios with feedback
- Interactive Exercises – Stakeholder mapping, power analysis, deal structuring
- Peer Exchange – Best practices across regions, institutions, and asset types

Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable) Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: The Strategic Role of Negotiation in Asset Management

- Module 1 (07:30 – 09:30): Foundations of Strategic Negotiation for Investors
- Module 2 (09:45 – 11:15): Institutional Negotiation Psychology & Power Dynamics
- Module 3 (11:30 – 01:00): Case Study: Fee & Performance Term Negotiation

Day 2: Tools, Tactics & Counterparty Strategy

- Module 4 (07:30 – 09:30): BATNA, ZOPA, Anchoring, and Framing in Financial Deals
- Module 5 (09:45 – 11:15): Counterparty Mapping: GP, LP, Regulator, & Consultant Roles
- Module 6 (11:30 – 01:00): Tactics for Collaborative and Adversarial Settings

Day 3: Multi-Stakeholder and Cross-Border Deals

- Module 7 (07:30 – 09:30): Cultural and Legal Sensitivities in International Negotiations
- Module 8 (09:45 – 11:15): Governance, Reputation, and Communication Risks
- Module 9 (11:30 – 01:00): Simulation #1 – Negotiating an Investment Side Letter

Day 4: Advanced Deal-Making and Risk Management

- Module 10 (07:30 – 09:30): Structuring Win-Win Outcomes with Risk Adjustments
- Module 11 (09:45 – 11:15): Managing Deadlocks and High-Pressure Concessions
- Module 12 (11:30 – 01:00): Simulation #2 – Cross-Border Co-Investment Negotiation

Day 5: Consolidation & Personal Negotiation Blueprint

- Module 13 (07:30 – 09:30): Debrief of Simulations: Lessons Learned
- Module 14 (09:45 – 11:15): Negotiation Self-Assessment and Development Plan
- Module 15 (11:30 – 01:00): Personal Strategy Design + Certification Ceremony

Certification

Participants will be awarded a Certificate of Completion in Strategic Negotiation for Sovereign and Institutional Asset Managers, demonstrating proficiency in conducting high-stakes negotiations in complex investment environments.

Why Choose MAWA Events

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In-House / Customized Training

Interested in running this course for your team?

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