

United we stand: a principle-based negotiation training for collective bargaining

Training for
collective
bargaining

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Abstract

Purpose – This study aims to identify effective behaviors in labor-management negotiation (LMN) and, on that basis, derive overarching psychological principles of successful negotiation in this important context. These empirical findings are used to develop and test a comprehensive negotiation training program.

Design/methodology/approach – Twenty-seven practitioners from one of the world's largest labor unions were interviewed to identify the requirements of effective LMN, resulting in 796 descriptions of single behaviors from 41 negotiation cases.

Findings – The analyses revealed 13 categories of behaviors critical to negotiation success. The findings highlight the pivotal role of the union negotiator by illustrating how they lead the negotiations with the other party while also ensuring that their own team and the workforce stand united. To provide guidance for effective LMN, six psychological principles were derived from these behavioral categories. The paper describes a six-day training program developed for LMN based on the empirical findings of this study and the related six principles.

Originality/value – This paper has three unique features: first, it examines the requirements for effective LMN based on a systematic needs assessment. Second, by teaching not only knowledge and skills but also general psychological principles of successful negotiation, the training intervention is aimed at promoting

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long-term behavioral change. Third, the research presents a comprehensive and empirically-based training program for LMN.

Keywords Collective bargaining, Interviews, Labor-management negotiation, Needs assessment, Psychological principles, Qualitative research, Training

Paper type Research paper

Introduction

17.8 billion dollars.

This is about how much organizations invest in negotiation training every year (global training expenditures of \$356bn in 2015, [Beer et al., 2016](#); 5% share for negotiation training, [Gates, 2006](#); see also [Zerres et al., 2013](#)). With training, organizations follow a “systematic approach to affecting individuals’ knowledge, skills, and attitudes in order to improve individual, team, and organizational effectiveness” ([Aguinis and Kraiger, 2009](#), p. 452). This huge investment in training highlights the importance of negotiation as a critical skill in management ([World Economic Forum, 2020](#)) and a cornerstone of organizational performance ([Huthwaite International, 2009](#)).

Given this background, it is crucial to ensure that training actually makes participants better negotiators. Previous empirical research shows that teaching specific techniques can indeed improve participants’ abilities to apply such techniques (e.g. logrolling; [Zerres et al., 2013](#)). However, demonstrating that specific negotiation techniques can be trained effectively is only a first step in establishing the scientific basis for developing effective training. Therefore, various studies in negotiation research take more comprehensive approaches to training (e.g. [Druckman and Robinson, 1998](#); [McGuire et al., 2020](#)). Although existing interventions provide valuable contributions to negotiation education, they typically leave at least one of the following three aspects unaddressed: first, because what constitutes effective negotiation is often *context-dependent* ([Borbély and Caputo, 2017](#); [Chapman et al., 2017](#)), it is important to systematically examine which negotiation skills are needed in a given context (see [Schneider, 2012](#)). For instance, effective sales negotiation may require different skills than negotiating mergers, collective agreements or international peace treaties. Thus, training programs should be designed to help participants become (more) effective negotiators in their specific context. Negotiation research offers training programs for political negotiations (e.g. [Druckman and Robinson, 1998](#)); however, evidence-based and comprehensive programs for other important contexts are scarce. This finding is particularly true for collective bargaining or labor-management negotiation (LMN), although this context constitutes “a cornerstone institution for democracy” ([Hayter et al., 2011](#), p. 226) due to its societal impact. Therefore, the availability of effective training for LMNs should be given high priority.

Second and related to the first consideration, training is more effective when its content is determined by analyses of task and skill requirements rather than based on theory or literature ([Taylor et al., 2009](#)). The training literature considers such a *needs assessment* as an elementary step in developing effective training interventions ([Aguinis and Kraiger, 2009](#)). Despite their positive influence, systematic needs assessments have received little attention in scientific negotiation training. Scholars typically develop theory- and literature-based training curricula and refrain from conducting empirical needs assessments for the training participants’ specific negotiation context.

Third and finally, as a major challenge in training lies in successfully transferring what is learned to real-world settings (e.g. [Lewicki, 2014](#)), it is necessary to consider how training transfer can be promoted. There is a growing concern in academia about whether focusing

solely on improving knowledge and skills is sufficient to learn effective negotiation (e.g. Brett, 2015; Trötschel *et al.*, 2022). Therefore, scholars within and beyond the negotiation literature suggest promoting training transfer by aggregating single techniques and behaviors into general *principles* (e.g. Baldwin and Ford, 1988; Thompson *et al.*, 2000). Supporting this argument, related research on entrepreneurial training has shown the beneficial effects of teaching action principles (Frese *et al.*, 2016). Action principles facilitate learning transfer by bridging the gap between knowing (i.e. cognitions) and doing (i.e. behavior; Glaub *et al.*, 2014). Ultimately, internalizing these principles is supposed to change training participants' entrepreneurial *mind-set* (i.e. their overall psychological orientation toward entrepreneurship; see Rucker and Galinsky, 2016), which makes them more successful business people (e.g. Campos *et al.*, 2017). Similarly, negotiation literature has advocated that changing trainees' negotiation mind-set (besides teaching skills and knowledge) may make them better negotiators (Ade *et al.*, 2018). Although various examples in negotiation research go beyond teaching knowledge and skills (e.g. attitude change, Mans *et al.*, 2010; self-understanding as a negotiator, Fox *et al.*, 2010), to the best of our knowledge, no study in the negotiation literature has yet aimed at internalizing psychological principles, which then guide participants' behavior in their negotiation practice.

With the present research, we seek to explore what is required to effectively negotiate labor-management agreements from the perspective of union representatives and, building on this, develop a principle-based negotiation training for LMN. Through a systematic needs assessment using the knowledge of 27 experienced negotiators from one of the world's largest unions, we aim to advance the understanding of effective behaviors in this important negotiation context. By identifying psychological principles based on these behaviors, we intend to derive overarching guidelines for effective LMN that add to existing theory. Building on our empirical findings, we designed and tested a comprehensive negotiation training, which we describe in detail in this article. This training can be used by labor unions to educate their employees and may serve as a potential blueprint for developing trainings for other negotiation contexts.

The remainder of this article is structured as follows: We first review the literature on negotiation trainings and LMN. Second, based on a systematic analysis of effective negotiation behavior and its translation into psychological principles, we illustrate the development and delivery of a negotiation training program for this specific context. Finally, we discuss theoretical and practical implications and provide directions for future research.

Theory

Negotiation training

Several insights from the literature suggest that negotiation skills can be improved through training (see Movius, 2008). However, this research primarily focuses on “minimal interventions” that do not qualify as comprehensive training programs because they are directed at learning single competencies such as logrolling (e.g. Gentner *et al.*, 2003; Nadler *et al.*, 2003). We define comprehensive negotiation training as systematic programs designed to improve participants' negotiation effectiveness based on holistic curricula and diverse learning activities spanning over at least one day (i.e. a minimum of 6 h; see Aguinis and Kraiger, 2009).

To review the research on negotiation training programs, we systematically searched the databases Scopus, Web of Science and APA PsycNet for published journal articles (search string: “negotiat* OR bargaining AND train*”). Our effort yielded a total of 268 articles, which were analyzed by the first author and a research assistant. We then conducted

complementary searches via Google Scholar (213 records) as well as forward and backward searches. We included empirical studies that focused on teaching adults in comprehensive negotiation training, selected the training content empirically (i.e. based on a needs assessment) or theoretically (i.e. based on theory or literature) and provided detailed information about the training curriculum. Our search yielded three scientific articles. This result is surprising but can be explained by three findings:

- (1) many trainings have a narrow scope (i.e. minimal interventions), others are;
- (2) methodologically focused on single learning activities (e.g. simulations); and
- (3) not described in much detail. More information on the literature search is provided in Appendix S-A1 of the online supplementary material (OSM).

In the following, we outline the three comprehensive training programs identified in our search. [McGuire and colleagues \(2020\)](#) tested the impact of a 6.5-h training on negotiation outcomes of 84 student dyads. The training was based on social exchange theory and a normative preference for win-win solutions. The program aimed at improving participants' ability to adjust their behavior according to the negotiation situation. The curriculum included lectures, readings, group works and simulations. Compared to untrained dyads, trained dyads reached more and higher quality agreements. The training was designed for MBA students and did not address the specific requirements of participants' particular negotiation contexts. In contrast, the following two programs were designed for specific contexts.

[Fisher and Fisher-Yoshida \(2017\)](#) developed a 40-h training for negotiating in the context of environmental conflicts. The training focused on three central skills, previously identified in an empirical study for this specific context (i.e. collaborative process skills, science and conflict skills and monitoring and evaluation skills; [Singletary et al., 2008](#)). The curriculum included lectures, case studies and a simulation. Fifteen participants with differing professional experience evaluated the program as useful and applicable in a pilot test.

[Druckman and Robinson \(1998\)](#) developed a four-day training for diplomats. After reviewing about 100 empirical articles, they summarized the most important findings in narrative statements for 12 negotiation themes (e.g. achieving integrative agreements, third-party effects, culture) around which the training was structured. The core of their program was a sequence of negotiation exercises in which participants performed three different tasks (i.e. analyzing the case, developing a strategy and designing a training exercise). Training-groups of diplomats and students perceived the narratives as useful and found that the exercises facilitated their understanding of negotiation processes.

Overall, our literature review produced the following insights: first, the curricula of scientific training programs are typically based on underlying theories and/or delineated learning objectives. With one exception ([Fisher and Fisher-Yoshida, 2017](#)), we could not find another training program in negotiation research designed on the basis of a systematic needs assessment, although this is considered a transfer-enhancing step in developing training interventions ([Taylor et al., 2009](#)). Second, despite empirical evidence that psychological principles induce lasting performance gains ([Campos et al., 2017](#)), to the best of our knowledge, no academic negotiation training has yet taken this approach. Third and finally, there are well-documented, comprehensive negotiation trainings for relatively few contexts, and none is yet available for LMNs.

Labor-management negotiation

From a societal perspective, negotiations between labor and management are highly important. Since both parties jointly decide on critical issues such as wages, terms of

employment, as well as working conditions and practices (e.g. [Bacon and Blyton, 2007](#); [Hayter et al., 2011](#)), collective agreements have major impacts on workers, organizations and even entire industries and the economy. In labor-management relations, therefore, “the institutions of negotiation are perhaps most deeply rooted” ([Cutcher-Gershenfeld, 1994](#), p. 323). Given its relevance, it is crucial to provide effective negotiation training for this context.

LMNs have specific characteristics that distinguish them from many other contexts. For instance, parties often lack alternative negotiation partners ([Sebenius, 2017](#)), possess strong measures to apply pressure (e.g. union strikes, [Fisher and Ury, 1981](#)) and negotiate not only with each other but also with internal stakeholders ([Zhang et al., 2021](#)). Reflecting these specific characteristics, [Walton and McKersie \(1965\)](#) described four sub-processes in LMN, each serving a specific function, following its own inner logic and comprising specific bundles of behaviors or tactics:

- (1) distributive negotiation (i.e. competitive behaviors to improve individual outcomes);
- (2) integrative negotiation (i.e. cooperative behaviors to improve both parties' outcomes);
- (3) attitudinal structuring (i.e. behaviors affecting the labor-management relationship); and
- (4) intraorganizational bargaining (i.e. managing differences within one's own party).

[Walton and McKersie's \(1965\)](#) behavioral theory has fueled abundant research on negotiation behaviors and techniques, which has yielded valuable insights for all sub-processes. In distributive negotiation, the impact of various behaviors such as anchoring, framing, concession making or deceiving the other party on negotiation processes and outcomes have been extensively studied (e.g. [Aquino, 1998](#); [Hüffmeier et al., 2014](#); [Majer et al., 2020](#)). Research on integrative negotiations, on the other hand, has focused, for example, on the effects of perspective taking (e.g. [Trötschel et al., 2011](#)) or information processing (e.g. [De Dreu et al., 2006](#)) on negotiation. Studies on relational phenomena such as the level of trust between parties (e.g. [Kong et al., 2014](#)) address attitudinal structuring by the negotiators, while research on the consequences of negotiating as a representative exemplifies efforts to better understand the sub-process of intraorganizational bargaining (e.g. [Aaldering and De Dreu, 2012](#)).

Despite the numerous theoretical contributions and useful prescriptions that emerged from the research inspired by [Walton and McKersie \(1965\)](#), negotiators continuously face the challenge of managing certain dilemmas arising from interactions among the four subprocesses ([McKersie and Walton, 1992](#)). Handling these dilemmas requires negotiators to select the most effective behaviors from various options while taking into account the impact of each behavior within a sub-process as well as its influence on other subprocesses. For example, when negotiators communicate their party's interests and preferences to facilitate integrative negotiation, the other party may use this information in a distributive manner. This tension points to a core dilemma between integrative and distributive negotiation that is particularly impactful in LMN ([McKersie and Walton, 1992](#)). Moreover, disclosing a lot of information to the other party may raise doubts among constituents as to whether their interests are adequately pursued by their representatives, which points to a dilemma between integrative negotiation and intraorganizational bargaining ([McKersie and Cutcher-Gershenfeld, 2009](#)). These dilemmas between subprocesses might account for labor-management negotiators' persistent skepticism about interest-based negotiation ([Friedman, 1993](#); [Cutcher-Gershenfeld et al., 2007](#)).

One potential response to the pervasive problem of conflicting dilemmas is to support negotiators through effective training. At the interpersonal level, [Cutcher-Gershenfeld \(1994\)](#) suggested that parties “bargain over how to bargain” to jointly change the existing rules of

the game and restructure the negotiation process. He proposed synthesizing positional and interest-based negotiation in training to support negotiators to manage the tensions between distributive and integrative behaviors and ultimately improve their effectiveness in LMN. Another option lies in developing a behavioral compass to guide negotiators in LMN. This intervention focuses on changes at the level of participants' individual attitudes, assumptions or beliefs to support them in becoming more effective negotiators (see [van Boven and Thompson, 2003](#); [Brett, 2015](#)). Empirical research suggests that negotiators frequently adopt ineffective approaches to negotiation (e.g. fixed-pie assumption; [Thompson and Hastie, 1990](#); devaluation of counterpart's proposals; [Ross and Stillinger, 1991](#); adversarial bargaining; [McKersie and Cutcher-Gershenfeld, 2009](#)). Therefore, negotiation training could aim to provide overarching behavioral guidelines that help negotiators manage the dilemmas between the four subprocesses of LMN to become more effective negotiators. Despite the economic and social importance of LMNs, no such effort has yet been reported in the scientific literature.

Development of a principle-based training for labor-management negotiations

The present work seeks to identify what is required to negotiate effective collective agreements and develop a comprehensive training program tailored to this context based on our empirical findings. To this end, the training design followed a three-step approach consisting of a systematic needs assessment, the derivation of psychological principles as a behavioral compass in LMN and the development and delivery of the training based on these principles. In the following, we will outline each step.

Needs assessment

Qualitative analysis. To examine effective behaviors in LMN, we interviewed 20 practitioners with 26 years of professional union experience on average ($M = 26.89$, six women; see also Appendix S-T1 of the OSM). These interviews were complemented by seven preliminary interviews with potential training participants (i.e. the target group) and top-level executives. The primary purpose of the preliminary interviews was to get a better and more comprehensive understanding of the LMN context to develop the interview guide for the main interviews. These preliminary interviews, however, also provided empirical insights. All 27 key informants participated voluntarily, came from different organizational units and held different positions within the German union. The interviews took place between December 2020 and June 2021.

Due to the COVID-19 pandemic, all main interviews were conducted online via video-conferencing following an interview guide, including mandatory and optional follow-up questions (see Appendix S-A2 of the OSM). We performed semi-structured interviews based on the critical incident technique (CIT; [Flanagan, 1954](#)). Specifically, our interviews focused on negotiation cases (i.e. critical incidents) that informants experienced as particularly (un)successful from the union's perspective. We were, thus, primarily concerned with identifying (in)effective behaviors in these incidents. While effective behaviors illustrated what negotiators should do to negotiate successfully, ineffective behaviors provided clues about what negotiators should avoid and what they should do instead (see [Flanagan, 1954](#)). Forty-one critical incidents were reported. The interviews were recorded and transcribed verbatim in German. On average, the interviews lasted about 2 h ($M = 118.45$ min). The data material comprises 733 pages of single-spaced text.

The data analysis followed the inductive Gioia methodology ([Gioia et al., 2013](#)). First, we coded (in)effective behaviors in the key informants' terms. Second, as the number of codes became unmanageable after a few interviews, we formed first-order concepts by comparing

the codes in view of similarities and differences (Corbin and Strauss, 1990). Third and finally, a second-order analysis followed to identify a deeper structure in the material (Gioia *et al.*, 2013). This resulted in 15 second-order categories of effective behaviors in LMN. From interview number 14, no new concepts emerged (theoretical saturation, Glaser and Strauss, 1967), but subsequent interviews nevertheless contributed to a richer understanding of effective behaviors.

To ensure the trustworthiness of our findings, we took several measures (see Lincoln and Guba, 1986). First, all interviews were conducted by two researchers. Second, we cross-checked all transcripts for content. Third, the entire material was coded by two researchers in parallel using qualitative research software (f4analyse; see O'Kane *et al.*, 2021). All coding differences were discussed until a consensus was reached. Fourth, the categorization scheme underwent multiple modifications and extensions based on the emergence of new concepts. Fifth and finally, since the interviews, as well as the coding process, were conducted in German, we translated the findings into English after the data analysis was completed. A native speaker assisted in ensuring that our translations of the concepts, categories and quotes accurately reflected the core content.

Effective behaviors in labor-management negotiation. Based on 769 descriptions of single behaviors, we found 15 categories of effective behavior. In the following, two categories (i.e. mobilizing the workforce and self-regulation) are not considered in more detail because, unlike the other categories, they do not primarily relate to negotiation. The remaining 13 categories are presented in Figure 1 according to whether they refer to the negotiators' own party (i.e. *intragroup* level) or the employer's side (i.e. *intergroup* level). The OSM contains verbatim evidence for each behavioral category (see Appendix S-T2 of the OSM).

At the *intragroup* level, we found four categories of effective behaviors beyond organizing and mobilizing the workforce. First, our informants noted the importance of *preparing the negotiation* thoroughly and professionally, for example, by analyzing the financial and operational state of the respective organization(s) and industry. Second, effective LMN requires unions to *develop and pursue a joint negotiation strategy* that focuses on satisfying the workforce's interests based on internally agreed goals and red lines. Third, *preparing and leading the negotiation team* includes chairing committees and getting the team ready to negotiate with management (e.g. coordinating the negotiation team, coaching inexperienced team members). Finally, union representatives considered *negotiating within their own party* as relevant behavior in LMN. This category comprises managing stakeholders' expectations and coordinating potential concessions to the other party. These four behavioral categories illustrate the specific challenges union representatives face when negotiating on behalf of the workforce. Negotiators are constantly engaged in building internal consensus and working to ensure that their own team acts as one at the negotiation table (see Brett *et al.*, 2009).

At the *intergroup* level, *analyzing the other party* as the first of nine categories includes behaviors aimed at observing and assessing the other party as well as understanding their positions. Second, our key informants stressed the importance of *vigorously defending the union's positions* (and interests), for instance, by avoiding making premature concessions or urging the other party to approach the union's positions. Third, our data highlights the vital role of *exerting pressure on employers*, for example, by implementing activities such as rallies, strikes or involving the public. Fourth, various behaviors indicate efforts to *persuade the other party*, either through factually convincing (counter) arguments (i.e. argumentative persuasion) or through (touching) accounts by employees and appeals to employers' social responsibility (i.e. emotional persuasion). Fifth, our informants reported *personally*

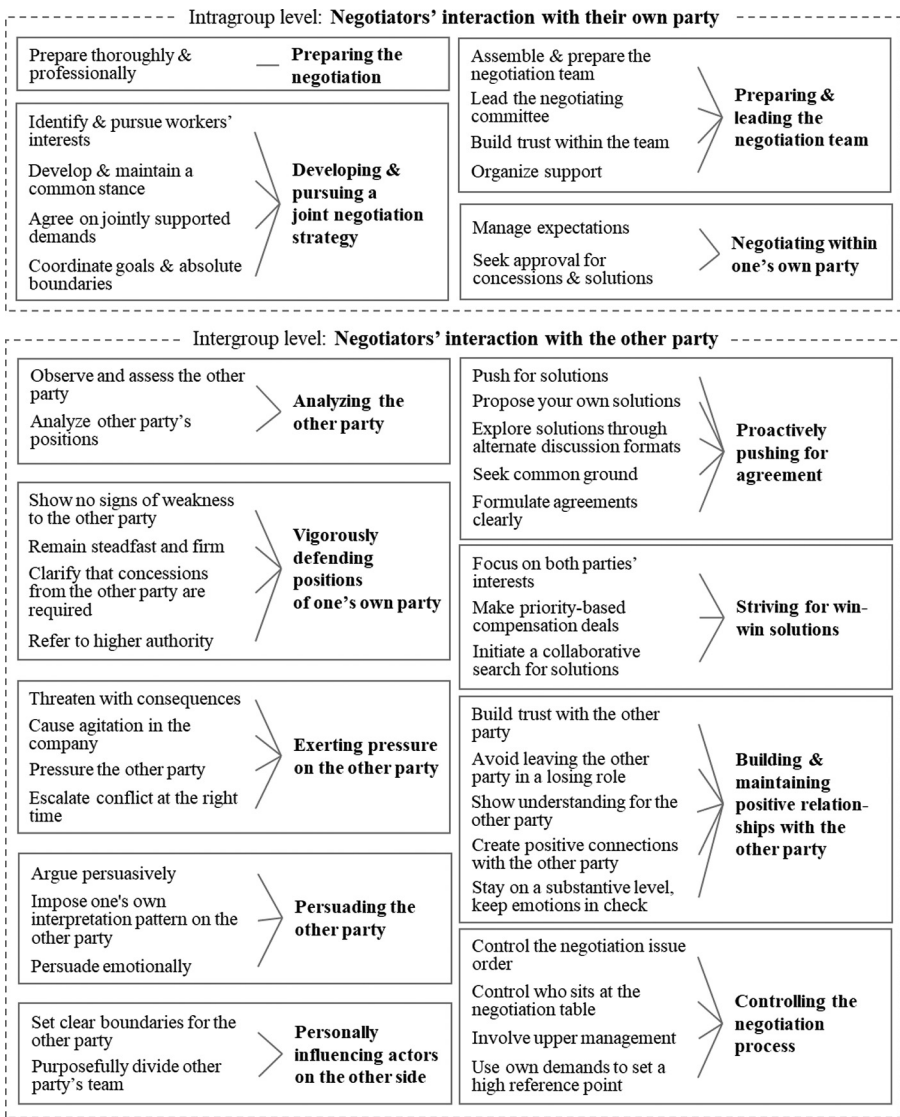


Figure 1.
Effective behaviors in
labor-management
negotiation

Note: The boxes contain second-order categories (in bold on the right) and first-order concepts (left)

Source: Authors' own work

influencing members of the other party, for instance, to divide their negotiation team or discourage their negotiators from undesirable actions, such as intimidating employee representatives. Sixth, *pushing for agreement* involves proactive behaviors such as making own proposals (e.g. alternative ways to integrate both parties' underlying interests) or trying to find solutions in other conversation formats (e.g. confidential one-on-one talks). Seventh,

our informants identified *striving for win-win agreements* as effective in LMN. This category includes systematically exchanging concessions on differently-prioritized issues (i.e. logrolling, [Froman and Cohen, 1970](#)) and focusing on both parties' interests to reach an agreement. Eighth, our key informants stressed the relevance of *managing relationships with the other party*, for example, by trying to build mutual trust and avoiding the impression that the other party failed in the specific LMN. Ninth and finally, by *controlling the negotiation process*, union negotiators influenced not only what issues are negotiated and when but also who sits at the negotiation table.

These nine categories cover a broad spectrum of requirements for effective LMN, ranging from directly outcome-oriented behaviors (e.g. demanding concessions from management, logrolling) to behaviors seeking to create a favorable environment (e.g. altering the power balance, building a relationship with management), thus indirectly influencing negotiation outcomes. These findings relate to the tension between competitive (value-claiming) behaviors and cooperative (value-creating) behaviors discussed in the literature (e.g. [Lax and Sebenius, 1986](#)). Interestingly, the reported competitive behaviors were richer in content and also occurred more frequently than the cooperative behaviors.

In summary, according to our sample, the 13 behavioral categories represent the requirements for effective LMN. They provide a basis for deriving psychological principles for effective negotiation and identifying the knowledge and skills union negotiators should acquire through negotiation training.

Psychological principles of effective labor-management negotiation

Principles in the training literature. The training literature suggests using general principles to promote the transfer of knowledge, skills and attitudes acquired in training to the workplace (e.g. [Baldwin and Ford, 1988](#); [Rousseau and McCarthy, 2007](#)). In the negotiation literature, the term “principle” describes related but different phenomena. First, scholars used this term to label integrative techniques that facilitate win-win agreements (e.g. logrolling, [Zerres et al., 2013](#); contingency contracting, [Gentner et al., 2003](#)). Second, principles have also been used to denote interaction processes and patterns in negotiation (e.g. differentiation-before-integration principle, [De Dreu et al., 2007](#)). Finally, [Fisher and Ury's \(1981\)](#) popular method of principled negotiation also uses principles constituting universal recommendations for effective negotiation.

These three conceptualizations of principles converge with [APA's \(2023\)](#) broad definition, describing a principle as “a fundamental rule, standard, or precept, especially in matters of morality and personal conduct.” However, research on action-regulation and mind-set-oriented training offers another perspective on principles. In the related field of entrepreneurship, teaching action principles has been found to increase training effectiveness ([Frese et al., 2016](#)). These “action principles are derived from theory and scientific evidence and provide knowledge about how to do something” ([Gielnik et al., 2015](#), p. 70). As “action-ready rules of thumb” ([Frese et al., 2016](#), p. 197), they link declarative (i.e. knowing what to do) and operational knowledge (i.e. knowing how to do it), thus bridging the gap between knowing and doing ([Glaub et al., 2014](#)). Internalizing action principles does not only have a positive impact on entrepreneurial behavior and success but can also change participants' *mind-set* ([Campos et al., 2017](#)). The term mind-set refers to a psychological orientation that guides people's approaches and behaviors in a specific social context, for example, in entrepreneurial activities ([Ade et al., 2018](#); [Glaub et al., 2014](#); [Rucker and Galinsky, 2016](#)). Empirical studies demonstrated the positive effect of teaching action principles on the development of an entrepreneurial mind-set characterized by the three facets of personal initiative (i.e. self-starting behavior, long-term orientation and persistence;

Campos *et al.*, 2017; Glaub *et al.*, 2014). Ultimately, these interventions promoted lasting business success.

In negotiation research, Ade and colleagues (2018) introduced a similar approach to increase training effectiveness. To reach sustainable and integrative agreements, the authors proposed that negotiators should approach negotiations by being collaborative, curious and creative. Together, these psychological inclinations (or principles) describe the integrative mind-set to be developed in negotiation training (Ade *et al.*, 2018). With mind-set-oriented negotiation training (MONT), negotiation education moves beyond teaching skills and knowledge by also aiming to alter participants' mind-set and thus how negotiators approach and behave in negotiations.

With the present study, we build on both lines of research by identifying overarching psychological principles of effective LMN. We define psychological negotiation principles as (aggregate) cognitive bundles of scientific knowledge about how to negotiate effectively that guide negotiators' perceptions and behaviors in a specific negotiation context (see Ade *et al.*, 2018; Frese *et al.*, 2016; see also Rucker and Galinsky, 2016). We argue that the internalization of psychological principles promotes training transfer and long-term behavioral change by facilitating the development of a negotiation mind-set, altering the way people approach negotiations (Ade *et al.*, 2018). The next section describes how we derived the psychological principles of effective LMN based on our data.

Psychological principles of labor-management negotiation. To identify the psychological principles for LMN, we searched our data for patterns of effective behavior. While behaviors describe what negotiators do (e.g. demanding concessions from the other party), principles refer to what negotiators want to achieve with a particular behavior (e.g. satisfying their own party's interests). From the data, we derived a total of six psychological principles.

First, we recognized different behaviors directed at satisfying the union's interests. These include making extreme demands, persuading the other party (e.g. with "waterproof" arguments), being reluctant to offer concessions, pressuring management (e.g. through strikes or workplace disruptions) and involving the public. These multifaceted competitive behaviors constitute the first psychological principle termed "*unyielding*." This principle shows parallels to hardline bargaining (Huffmeier *et al.*, 2014) and distributive behaviors in the negotiation literature (Walton and McKersie, 1965) but aims at persistently pursuing one's own party's interests rather than their positions. This principle is about claiming value for one's own party or maximizing the union's outcomes, even at the employers' expense (Lax and Sebenius, 1986). The following exemplary quotes are illustrative of this principle:

We interrupted the negotiation again and again up to the point where I then said, 'I need a contractual regulation [for this negotiation issue]. And if we do not get that regulation, then we cannot sign this collective bargaining agreement again.' I think we parted six times that night before the thing came to be signed. (Informant [I]-09)

[...] we were able to say, even if we are in favor of it, the members won't accept it, and therefore we do not need to write it down here and now. That's always a good argument in negotiations, that we have this general meeting with the members at the end. (I-11)

Second, our data comprises various behaviors directed at cooperating with management. These include sharing information about interests and priorities, encouraging the joint search for creative solutions, proactively offering proposals for mutual benefit, seeking solutions in alternative conversation formats and making systematic trade-offs. This psychological principle of "*collaboration*" describes cooperative behaviors to identify negotiation agreements that satisfy both parties' interests. It shows considerable similarities with integrative and interest-based negotiation (Cutcher-Gershenfeld, 1994; Walton and

McKersie, 1965) directed at creating value (Friedman, 1993). Two sample quotes provide verbatim evidence for this principle:

To see if we can address things that the other side is interested in. In a way we can also live with. In other words, to try to catch them at their interests. (I-05)

To clarify once again what the true interests are. The ones behind the need for that or another measure the negotiating partner has in mind. (I-01)

Third, behaviors of leading the negotiation team, pursuing a jointly agreed strategy, and negotiating internally are directed at building trust within one's own party to secure the workforce's support and working effectively together as a negotiation team. These behaviors fall under the psychological principle of "*team focus*," which addresses specific characteristics of LMN, such as negotiating as a representative. Walton and McKersie (1965) identified behaviors of intraorganizational negotiation as an elementary sub-process of LMN primarily focused on how negotiators manage differences within their own organization, for instance, concerning their own party's goals and the means to achieve them (Walton *et al.*, 2000). This sub-process involves providing transparency about the course of a negotiation, resolving intragroup conflicts or making participative decisions. However, according to our data, the role of union (lead) negotiator requires further behaviors beyond those suggested by Walton and McKersie (1965), such as building trust within the workforce, ensuring that one's team meets the requirements for effective LMN and implementing a jointly developed strategy throughout the negotiation process (e.g. to avoid detrimental behavior at the table; see also Brett *et al.*, 2009). The relevance of team-oriented behavior is demonstrated by two exemplary quotes:

There are certain colleagues, volunteer representatives [of the worker's council], whom you might need to explain to be careful about what to say in a negotiation and that you might have to exchange ideas with your team [first]. I think it's important that there's an agreement within the team beforehand. (I-18)

The demand needs to be supported as broadly as possible. That's important. Not just any special demand from anyone, but the vast majority of colleagues were or are supporting the demand. (I-03)

Fourth, various reported behaviors aimed at establishing good relations with the management to create the interpersonal basis for successful negotiation. Our analyses suggest that effective LMN requires negotiators to actively shape the relationship with the other party, build mutual trust and signal understanding of the other party's perspective. This principle of "*relationship orientation*" comprises behaviors directed at ensuring good working relations with management. Its relevance is substantiated in negotiation theory. Walton and McKersie (1965) describe how negotiators try to influence parties' attitudes toward each other to change the other party's cognitions and actions (i.e. attitudinal structuring). Positive attitudes between parties are considered essential in integrative negotiation (Walton *et al.*, 2000). In line with this consideration, previous research found that cooperative partnerships between labor and management promote productivity in companies with unionized workforces (Black and Lynch, 2004). Sample quotes highlight this psychological principle of effective LMN:

I actually always look at whom I have on the other side, who I can connect with, and if it's useful due to the person's influence (I-14).

I think that I also need a basis of trust with the management, somehow, in order to get a result (I-13).

Fifth, our data contains several statements that refer to behaviors intended to increase negotiators' reliability, trustworthiness and consistency in the eyes of the other party *and* members of their own party. This principle, which we coin "*integrity*," is relevant in many negotiation contexts, but particularly in LMNs because union representatives negotiate with the same people on the employer side and interact with the same workforce on a regular basis (Bacon and Blyton, 2007). Given this constellation, their perceived (ethical) integrity is an important antecedent for negotiators' reputation as a trustworthy person, which, in turn, influences their effectiveness (Mayer *et al.*, 1995; Schneider, 2012). The informants mentioned important behaviors such as keeping promises, refraining from taking advantage of the other party, consistently implementing announced responses to the other party's behavior ("walking the talk," e.g. going on strike after the strike warnings were ignored) or showing loyalty to the workforce's interests. Empirical research showed that trust between negotiators facilitates the exchange of information necessary to reach integrative agreements (Kong *et al.*, 2014). By contrast, a reputation as an egoistic, untrustworthy negotiator reduces information exchange and joint negotiation outcomes (Tinsley *et al.*, 2002). Demonstrating personal integrity is also important with respect to constituents, who are usually concerned about their interests being effectively pursued at the negotiation table (Lax and Sebenius, 1986). Because of their accountability to constituents, union negotiators seek to be perceived as trustworthy and sincere by those they represent, as the first of the following exemplary quotes illustrates:

Right from the start, I involve colleagues from the company. It's important to me that they're involved and know how the negotiations are going. Because that's how myths are created; When you are sitting alone at the negotiation table, only you know what happened, and one can tell a lot. (I-13)

You must build up a certain amount of trust with your negotiating partner, even if they're completely on the opposing side. So, of course, avoid telling lies; but negotiate on equal footing. And you shouldn't try to take advantage of anyone because you always see each other twice. (I-04)

Finally, different informants aimed to look beyond the immediate, short-term consequences of the negotiation by also considering the long-term consequences, such as examining parties' present and future interests or anticipating challenges in future negotiations. The importance of this temporal perspective on parties' interests is emphasized in different lines of research on negotiations and intertemporal decision-making (see Majer *et al.*, 2021; Mann *et al.*, 2022; Strathman *et al.*, 1994). In addition to this temporal perspective, from a societal view, negotiations rarely affect only the (present and future) interests of negotiating parties but often also impact those of external parties not represented at the negotiation table (i.e. externalities, Menkel-Meadow, 2009). Although this social dimension is not strongly reflected in our data, we regard it as an important aspect in light of the current economic transformation processes in which the outcomes of LMNs affect whole societies (e.g. technological change, McKersie and Cletcher-Gershenfeld, 2009; future of work, DGB, 2021; see also Trötschel *et al.*, 2022). "*Sustainability*," the sixth principle, encourages negotiators to consider future developments and socio-ecological implications in LMNs. The following exemplary quotes provide verbatim evidence for this principle:

So there is no use in working through it the way we did [before]: simply reconciling interests, developing a social compensation plan. And then people are kicked out. Two years later, the employer realizes that they need them back. That is what happened last time. (...) we always tried to keep in touch with the management, to explain: We should actually take a look at this from a different angle. (I-14)

For the first time, we also presented a step-by-step plan. (...) We are not pushing the company to something it cannot afford. Instead, we are acting with foresight and can also imagine this over the years. (I-20)

In summary, the six psychological principles of effective LMN are:

- (1) unyielding;
- (2) collaboration;
- (3) team focus;
- (4) relationship orientation;
- (5) integrity; and
- (6) sustainability (see [Table 1](#)).

They serve two major purposes:

- (1) they defined the *knowledge-set* to be acquired and the *skill-set* to be developed by participants through the training (i.e. first training objective); and
- (2) we further aimed at an internalization of these principles (i.e. second training objective) to stimulate a lasting change in participants' negotiation *mind-set* ([Ade et al., 2018](#)).

Both training objectives guided the training development and ensured a learner-centered approach with learning activities tailored toward the objectives ([McAdoo and Manwaring, 2009](#)).

Design and delivery of the training

Curriculum development. We designed the program based on two theoretical frameworks from the training literature:

- (1) *experiential learning* ([Kolb and Kolb, 2005](#)) as a well-established approach in negotiation education ([Lewicki, 2014](#)) suitable for complex tasks such as LMN (see [Fisher and Fisher-Yoshida, 2017](#)); and
- (2) *MONT* as an innovative approach to promoting long-term behavioral change ([Ade et al., 2018](#)).

Experiential learning theory characterizes learning as a cyclic process consisting of four learning modes to consider when designing training interventions:

- (1) concrete experiences (experiencing);
- (2) reflective observation (reflecting);
- (3) abstract conceptualization (thinking); and
- (4) active experimentation (acting, [Kolb and Kolb, 2005](#)).

Principle	Description
Unyielding	Pursuing one's own party's interests with persistence and firmness
Collaboration	Jointly searching for solutions that serve both parties' interests
Team focus	Acting together as one at and beyond the negotiation table
Relationship orientation	Building a good working relationship with the other party
Integrity	Behaving reliably, trustworthily and consistently
Sustainability	Considering future developments and social-ecological implications

Source: Authors' own work

Table 1.
Six principles of
effective LMN

To facilitate learning, we sought to address all four modes through different learning activities, including lectures, practical examples, cases, exercises, negotiation simulations, (psychological) experiments, discussions, feedback and peer consultation (see [Lewicki, 2014](#)). Most exercises and simulations were specifically developed for the training and involved the following elements: instruction, planning, execution, reflection, debriefing and discussion and feedback. They were intentionally designed outside the familiar context of LMN to direct participants' attention on the lessons to be learned and not to compromise the learning experience with psychological barriers, such as participants' focus on inconsistencies in the simulation or fear of being embarrassed before their peers (see [Crampton and Manwaring, 2019](#)). [Figure 2](#) illustrates the experiential learning approach of the training program.

Within their MONT approach, [Ade and colleagues \(2018\)](#) suggested various activities for mind-set development and transfer. We integrated several activities into the curriculum, as internalizing the six psychological principles and the related mind-set change represented an important training objective. For mind-set development, we relied on evidence-based instructions for each principle and simulations as a basis for reflection and feedback on participants' behavior related to the principles. To promote mind-set transfer after the training, we encouraged regular peer consultations, offered coaching sessions and enriched the curriculum with mind-set activation techniques for negotiation practice (e.g. if-then plans, [Trötschel and Gollwitzer, 2007](#)).

Curriculum overview. We divided the training program into three two-day modules to facilitate retention of training content over time ([Baldwin and Ford, 1988](#)) and provide participants with opportunities to try out in the workplace what they had learned. In the following, we briefly outline the curriculum of each of the three modules. A detailed description of the entire training is available in the OSM (Appendix S-A3 of the OSM).

Module 1. The first module focuses on the six psychological principles of LMN and effective preparation (see [Table 2](#) for an overview). It starts with an exercise in which

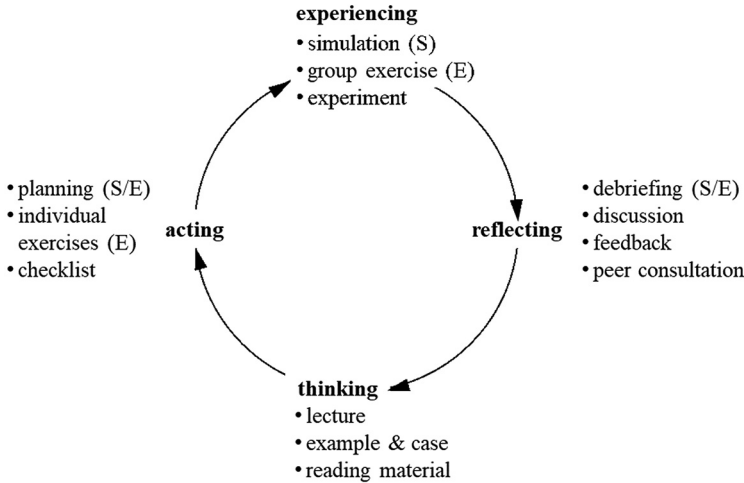


Figure 2.
Learning activities of
the training program

Notes: E = exercise; S = simulation
Source: This figure was created by the authors based on Kolb and Kolb (2005) and Lewicki (2014)

Table 2.

Curriculum Module 1

M1: Principles of effective negotiation and preparation

Day 1

Day 2

Introduction (60 mins)

Recap (15)

Psychology of negotiation (190)

Basic concepts (185)

E: Internalization of psychological principles by participants

S: "Flat in Eltville"

S: "Coalition Building in Nordland"

L: Basic concepts in negotiation – goals, limits, ZOPA[#] and BATNA[°]

X/L: Psychological aspects in negotiations

L: Basic concepts in negotiation continued – positions, interests, priorities, issues and resources

Psychological principles of negotiation (105)

Preparation (100)

L: Mind-sets – concept and impact

L: Systematic negotiation preparation

L/D/E: Psychological principles of effective negotiation

E/D/O: Preparing for an upcoming negotiation based on the preparation checklist

E: Definition of learning objectives

Wrap-up (10)

Wrap-up, transfer exercise, evaluation (30)

Notes: D = discussion; E = exercise; L = lecture; O = other activities (e.g. reading, checklist); S = simulation; X = experiment; [#] Zone of Possible Agreement (Raiffa, 1982); [°] Best Alternative to a Negotiated Agreement (Fisher and Ury, 1981)

Source: Authors' own work

participants reflect on their own internalization of each psychological principle before the training. This is followed by an integrative negotiation simulation in a political context to activate the participants at the very beginning and to sensitize them to the psychological aspects of negotiations (e.g. intra-team conflicts). This latter aspect is reinforced by a lecture as well as various other activities designed to provide opportunities to experience the relevance of these psychological aspects. Then, the mind-set concept and each of the six psychological principles are introduced in detail. This involves further lectures enriched with videos, anecdotes and statements from the interviewees, as well as group discussions that use the attendees' practical experiences. Finally, the curriculum calls for participants to define learning objectives based on their results from the initial exercise. The second day begins with the simulation "Flat in Eltville," a price negotiation over a real estate transaction. This distributive task is designed to vividly demonstrate the goal-setting effect (i.e. addressing the psychological principle of "unyielding") and confront participants with the question of how to handle relevant information in negotiations (i.e. addressing the integrity principle). Lectures on basic concepts of negotiation (e.g. goals, limits, positions, interests) and systematic preparation for LMN follow. The latter comprises different perspectives on preparation (i.e. self-assessment, assessment of the other party, assessment of the context and self-regulation). The participants then use this structured approach to systematically prepare for an upcoming negotiation in the near future. These elements, along with a negotiation checklist, primarily refer to the four different psychological principles of "unyielding", collaboration, relationship orientation and sustainability. This first and the other two modules each conclude with a summary of the training content, a transfer exercise and an evaluation.

Module 2. The second module revolves around distributive and integrative negotiation (see Table 3). The first part focuses on distributive strategies (e.g. persuasion, concession strategy, anchoring and framing) to address primarily the psychological principle of

Table 3.
Curriculum Module 2

M2: Distributive and integrative negotiation	
<i>Day 1</i>	<i>Day 2</i>
Introduction (20 mins)	Recap (5)
<i>Distributive negotiation (105)</i>	<i>Integrative negotiation continued (45)</i>
E/L: Persuasion	P: Practical issues and experiences with distributive and integrative strategies in LMN
L: Concession strategy	
E/L: Anchoring	
E/L: Framing	<i>Information about the other party (75)</i>
L: Further tactics	L/D: Questioning techniques
	L/E: Active listening and paraphrasing
<i>Integrative negotiation (240)</i>	<i>Conflict escalation (140)</i>
S: "Ritaianus"	L/O: Conflict types and intervention
L: Basic idea of integrative agreements	D: Overcoming psychological barriers
L: Types of integrative solutions	S: "University Building"
L: Negotiation arithmetic	
E/L: Creative problem-solving	
S: "Job Contract"	
Wrap-up (10)	Wrap-up, transfer exercise, evaluation (30)
Notes: D = discussion; E = exercise; L = lecture; O = other; P = peer consultation; S = simulation	
Source: Authors' own work	

"unyielding". Various psychological experiments are conducted to vividly illustrate the impact of each strategy. As a bridge to integrative negotiation, participants then negotiate over a plant called "Ritaianus," which both parties aim to secure. This simulation illustrates the added value of integrative agreements over mere compromises and directs participants' attention to the collaboration principle, which remains the primary focus for the rest of the first day. Next, the basic idea of integrative negotiation is introduced, different types of integrative techniques (i.e. solving underlying concerns, logrolling, expanding the pie, contingency contracts; [Lax and Sebenius, 1986](#); [Pruitt and Carnevale, 1993](#)) and negotiation arithmetic (e.g. unbundling issues; [Sebenius, 1983](#)) are presented. An exercise in creative problem-solving ([Thompson, 2015](#), p. 195) and a "Job Contract" simulation conclude day one. The latter is a negotiation between an employer and a job candidate with hidden integrative potential. Participants are required to add issues to the negotiation to reach an agreement. The second day starts with a peer consultation in small groups and addresses practical issues and experiences related to distributive and integrative techniques in LMN (i.e. addressing the principles of "unyielding" and collaboration). Next, lectures, exercises and discussions on questioning techniques and active listening concentrate on how to obtain relevant information from the other party. These elements focus mainly on the psychological principle of relationship orientation, which is also central to the following part revolving around conflict escalation. This content starts with information on different types of conflicts (i.e. task versus personal conflict, [Thompson, 2015](#)). Since the stakes in LMN are often high and values, as well as emotions, play an important role, effective interventions are presented on how to cool down escalated conflicts between the parties. A discussion follows on how negotiators can overcome psychological barriers in practice and supplementary reading material is offered. A third simulation, addressing the collaboration principle, concludes the module. This negotiation over the construction of a "University Building" requires participants to make systematic concessions between three parties to achieve an integrative solution.

Module 3. The final module focuses on socially complex settings such as negotiating as a representative and as a team (see Table 4). It begins with a prisoner's dilemma game designed to demonstrate the challenges of team interactions (e.g. less cooperation; Wildschut *et al.*, 2003) and to illustrate the linkages among the six psychological principles of effective LMN. Participants' experiences during the exercise are then discussed in the course. A lecture on representative negotiation follows, including effective strategies, and a moderated peer consultation where participants share experiences and best practices in LMN. The rest of the day focuses on leading the negotiation team and the psychological principle of team focus. This part begins with a hidden profile exercise (see Stasser and Stewart, 1992), in which groups of three participants must make a joint decision. The team members are given instructions that include both shared information that everyone has and exclusive information that is only provided to one person in each group. To make the best decision, the team must share exclusive information, which is often not the case because teams tend to base their decisions mainly on shared information (Lu *et al.*, 2012). This exercise is followed by lectures on effective decision-making and negotiating as a team. The second day addresses negotiating between teams and focuses on integrating the six principles of LMN. It starts with a simulation between a supplier and a customer negotiating over a transaction of industrial tools. This business negotiation is conducted between two teams and requires participants to resolve conflicts of interests not only with the other party but also within their own team. A group discussion on effective team negotiation concludes this section. The final part of this module gives a brief review of the entire program, includes re-performing the exercise from the beginning of Module 1 by assessing participants' internalization of each psychological principle after the training to identify learning progress, and supports participants in transferring their learning and mind-set into daily practice.

The curriculum emphasizes different psychological principles within each module (see Table 5). While unyielding and collaboration are main topics throughout the entire program,

M3: Team negotiation

Day 1	Day 2
Introduction (25 mins)	Recap (10)
<i>Interacting in teams</i> (120)	<i>Team negotiation</i> (160)
E: "Oil for Alteria" (prisoner's dilemma game)	S: "Sale of Industrial Tools"
D: Challenges in team interactions	D/O: How to negotiate effectively in teams? Best practices, common errors and learnings
<i>Representative negotiation</i> (100)	<i>Conclusion</i> (60)
L: Challenges in representative negotiations	L: Summary of the training
L: Effective strategies	E: Internalization of psychological principles
P/O: Experiences and best practices in LMNs	L: Transfer of the six principles and mind-set activation
<i>Leading the negotiation team</i> (125)	
E: Hidden profiles in group decision-making	
L: Effective decision-making as a team	
L: Negotiating effectively as a team	
Wrap-up (10)	Transfer exercise and final evaluation (70)

Notes: D = discussion; E = exercise; L = lecture; O = other; P = peer consultation; S = simulation

Source: Authors' own work

Table 4.
Curriculum Module 3

team focus and relationship orientation are central in Modules 2 and 3. Integrity and sustainability are primarily addressed on the first and the last day of the program.

Training delivery. As the training period fell within the COVID-19 pandemic, the first and last modules were delivered as off-site trainings and the second module via online-conferencing. Training participation was voluntary. The number of participants per module varied between 14 and 22. Each module was led by at least two trainers.

We took various measures to obtain participant feedback on the training program during and after the delivery (i.e. group reflections, voting and questionnaires); feedback referred to each simulation and larger exercise, the three modules and the entire program. Participants rated the simulations and exercises on whether they enjoyed the activity, learned something and found the activity challenging. Most of the activities were not only enjoyed by the participants but were also perceived as useful in terms of what was learned. One participant appreciated that the activities were “well designed.” Another participant stated: “The real estate simulation created a very vivid aha effect!” The more complex the task structure, the more challenging the activities were rated. Further information can be found in the OSM (see Appendix S-A9 of the OSM).

Qualitative feedback indicated that participants considered the psychological principles useful for LMNs. One participant stated: “The principles were an enlightening moment for me. They guide me, for example, in what I say or what actions are smart in a specific moment.” Various participants felt that the training offered a valuable platform for exchanges among labor negotiators. Regarding the format, most participants preferred in-person over online trainings (“Zoom fatigue”).

Questionnaires were conducted for each module and the entire program directly after its completion. Items were rated on a scale ranging from 1 (*I strongly disagree*) to 7 (*I strongly agree*). Participants showed high overall satisfaction with the training ($M = 6.63$, $SD = 0.50$) and expressed the intention to recommend it to colleagues ($M = 6.94$, $SD = 0.25$). Other items provide preliminary evidence of the program’s usefulness beyond the level of participant reaction (i.e. job relevance, skill development, preparation for future negotiations; see Kirkpatrick, 1967). The results of the questionnaires are provided in Table 6 and the OSM (see Appendix S-A9 of the OSM). Another questionnaire seven months after the delivery provided encouraging insights into participants’ impressions about the long-term impact of the training. For instance, participants found that the training expanded their knowledge about negotiation ($M = 6.70$, $SD = 0.48$) and improved their negotiation skills ($M = 6.20$, $SD = 0.79$).

The pilot was used to identify opportunities to further optimize the program during its delivery (formative evaluation, Nieveen and Folmer, 2013). Based on feedback from the first module, we implemented more group discussions and peer consultations in the second and third modules. We also took up suggestions to provide additional materials (e.g. a

Table 5.
Training focus on
psychological
principles

Module	Day	Unyielding	Collaboration	Team focus	Relationship orientation	Integrity	Sustainability
M1	1	++	++	++	++	++	++
	2	++	++		+	+	+
M2	1	++	++		+		+
	2	+	++		++	+	
M3	1	++	++	++	++	++	+
	2	++	++	++	++	++	++

Note: ++ (+) indicates that the principle was a major (minor) topic
Source: Authors’ own work

preparation checklist), to adjust the time schedule for individual simulations and to avoid online training in the final training program.

Based on the positive experiences with the pilot, the labor union decided to include the program in its official training and development offering as a face-to-face seminar.

Discussion

Implications for theory on labor-management negotiation

With the present study, we broaden the understanding of what union negotiators do to negotiate collective agreements effectively. We found 13 behavioral categories referring to negotiators' interaction with the other party and their own party. Based on these findings, we identified six overarching principles as behavioral guidelines in LMN.

Our research provides a comprehensive picture of the demanding requirements for union representatives as the workforce's lead negotiators. Lead negotiators are not only responsible for actually *negotiating* with management but they are also engaged in negotiation-related activities of *leading* their own party and *setting up* favorable preconditions for the labor movement. In the following, we discuss each of these three sub-areas. With respect to negotiation, this research substantiates [Walton and McKersie's \(1965\)](#) theoretical framework of LMN because our findings relate to all four sub-processes of distributive negotiation, integrative negotiation, attitudinal structuring and intraorganizational negotiation. Our findings emphasize the importance of understanding LMN as a mixed-motive setting in which parties have common and conflicting interests that need to be addressed ([Cutcher-Gershenfeld, 1994](#)). Consequently, effective LMN requires lead negotiators to rely on both distributive *and* integrative behaviors (see [Bacon and Blyton, 2007](#)). However, our key informants displayed a much richer portfolio of distributive compared to integrative behaviors and reported distributive behaviors more often. This suggests that union negotiators are cautious about integrative negotiation, which could be due to a lack of belief in interested-based negotiation *per se*, as well as the fear of being taken advantage of by the management (adversarial relationship) or concern about how this negotiation approach might be perceived by constituents (see [Cutcher-Gershenfeld et al., 2007](#)).

The present study substantiates and advances existing theory on intraorganizational negotiation (e.g. [Fells and Savery, 1984](#); [McKersie and Walton, 1992](#)) by illustrating the importance of leadership for union effectiveness (see [Hammer and Wazeter, 1993](#)). Our analyses outline a broad and demanding leadership role that goes beyond reaching internal consensus on negotiation goals, strategies and outcome expectations ([McKersie and Walton, 1992](#)). Our findings shed light on further leadership activities by union negotiators, including behaviors aimed at ensuring that the various internal stakeholders (e.g. negotiation team

Item	M1 <i>n</i> = 14	M2 <i>n</i> = 10	M3 <i>n</i> = 16	Total <i>n</i> = 16
"Overall, I am satisfied with the training."	6.21	6.20	6.56	6.63
"I would recommend the training to colleagues."	6.38	6.60	6.81	6.94
"The training content is relevant for my work."	5.86	5.50	6.19	n/a
"I am satisfied with the progress I have made so far in my negotiation skills as a result of the training."	5.50	4.90	5.69	6.19
"The training is a good preparation for future negotiations on the job."	5.57	5.60	5.81	n/a

Note: Mean values on a seven-point scale (1 = *I strongly disagree* to 7 = *I strongly agree*)

Source: Authors' own work

Table 6.
Results of the
questionnaires

members, union members, the workforce) become and stay united throughout the entire negotiation process, building trust within their own party, allocating responsibilities within the team and preparing the (often inexperienced) negotiation team for upcoming LMNs.

Finally, our key informants reported behaviors to set up favorable preconditions for LMNs. Our findings support the importance of reducing informational disadvantages on the union side regarding the economic situation of the respective corporation or industry (Friedman, 1993), for instance, by using expert knowledge within or outside the workforce. This behavior was motivated by union negotiators' intentions to validate management claims, elaborate counterarguments and develop viable solutions themselves, such as alternative approaches to reorganizing or rescuing troubled companies. Moreover, our informants used their contacts with politicians and the press to build support for the labor movement and establish solidarity among workers in the same company or even between different companies. By doing so, union negotiators set the stage for their interactions at the negotiation table.

In summary, union negotiators are faced with a demanding and complex task requiring them to stand up for the workforce's interests, lead their team(s), find appropriate answers to the conflict of interest with management and create favorable preconditions at the negotiation table. The psychological principles presented are intended to support negotiators in managing these challenges.

Implications for theory and research on negotiation education

The present study has three major implications for negotiation education. First, we contribute to the literature by presenting an approach for conducting a needs assessment as a basis for designing context-specific negotiation training using the well-established CIT (Flanagan, 1954). This analysis of effective behaviors in LMN may provide a blueprint for future projects, for example, developing evidence-based training programs for other contexts such as business-to-business negotiations.

Second, by using psychological principles, we transfer an effective approach from entrepreneurial training (e.g. Frese *et al.*, 2016) to negotiation research. Our principle-based and MONT approach (Ade *et al.*, 2018) goes beyond teaching knowledge and skills by offering union representatives a behavioral guide to navigate the dilemmas between the four sub-processes. The simultaneous consideration of the principles directs negotiators' attention toward identifying behaviors that are consistent with the principles relevant to a particular situation and their underlying purposes. We posit that this approach helps negotiators cope with the challenges in LMN because the principle-based behavioral compass facilitates the identification of effective behaviors. With the training program, we present a first application of the MONT approach aimed at both promoting training transfer and lasting behavioral change (Ade *et al.*, 2018).

Third, the training curriculum includes lectures, simulations and exercises related to group decision-making, negotiating as a representative and team negotiation. The program thereby acknowledges the importance of intraorganizational, multi-level dynamics and the high degree of complexity in LMN, critical aspects often neglected in negotiation training (Greenhalgh and Lewicki, 2015).

Practical implications

The present research has several practical implications. At the organizational level, we offer a training program that labor unions can use to improve the effectiveness of their negotiation teams. The pilot-tested training addresses the requirements for effective LMN and the specific features of the negotiation context, for instance, by integrating the perspective of intraorganizational negotiation and emphasizing the relevance of building

good working relationships with management. With our tested negotiation training, we offer guidance for future projects that also seek to make use of psychological principles and/or develop participants' negotiation mind-sets.

At the individual level, the present study contains a systematic overview of behaviors that experienced negotiators consider effective in LMN. Our findings may assist practitioners in expanding their (behavioral) toolkit in LMN. The six psychological principles constitute a compass for effective LMN intended to guide negotiators' behavior in practice, for instance, by eliminating behaviors that are inconsistent with the principles (e.g. not making false promises to the other party to elicit concessions).

Limitations and future research

Naturally, the present research has limitations, which may provide intriguing directions for future research. Our findings are based on a sample of German union negotiators from one of the world's largest unions, which represents employees in various industries. Due to the union's size and structure, its negotiations might represent prototypes of effective LMN. However, LMN in other industries may have unique characteristics that require different behaviors. For instance, the high relevance of services to the public (e.g. public transport, waste collection) might influence the balance of power at the table and, consequently, negotiation behavior. Although we are confident that our findings are transferable to other countries and cultures because they link to existing theoretical models, effective behavior in LMN may also depend on characteristics of the partnership between labor and management or cultural conventions in a given country. To move beyond these potential limitations of our findings, future research could investigate effective LMN behavior in industries, countries and cultures that are fundamentally different from our sample.

Our qualitative approach used practitioners' reflections on past experiences in LMN. The data collection was based on an inductive and exploratory bottom-up approach. However, the qualitative data may not fully and accurately represent the critical incidents due to retrospective sensemaking, memory distortion or biased perceptions on the union side. Future research may cross-check our findings on the requirements for effective negotiation by using different samples (e.g. management representatives) and/or other research methods such as case studies, observations or surveys (Lincoln and Guba, 1986).

The training was accompanied by measures of formative evaluation to refine the program during its pilot delivery (Nieveen and Folmer, 2013). Consequently, future research could investigate the program's effectiveness in a summary evaluation to determine whether it is achieving the desired effects and to assess its efficiency (return on investment; Movius, 2008). From a psychological perspective, we transferred empirical findings from entrepreneurial training, showing that mind-set-oriented approaches promote training transfer (e.g. Frese *et al.*, 2016) to the context of negotiation. The feedback from participants provides preliminary insights into the usefulness of this training approach, which aims to change participants' negotiation mind-set (Ade *et al.*, 2018). However, as developing and validating a reliable scale for measuring negotiators' mind-set in LMN was beyond the scope of this research, it has yet to be tested whether the intervention actually changes participants' negotiation mind-set.

Conclusion

LMNs are known to substantially impact workforces, corporations, industries and societies. Because of their importance, we conducted a qualitative study to examine effective negotiation behaviors in this specific context. Based on our findings, we derived six psychological principles of LMN that guide negotiators' behavior to master this challenging task, which also requires effective leadership to unite the workforce and establish favorable

preconditions for the negotiations. We developed and delivered a training program for union negotiators that went beyond teaching knowledge and skills by aiming to also change participants' mind-set through the internalization of the psychological principles. We hope this research will be useful for researchers, trainers, unions and practitioners.

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Supplementary material

Online supplementary material (OSM) is available at https://osf.io/mc567/?view_only=b667fddce7cc4c40b674106d60da601f

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