

Briefing Book Guide

A briefing book provides a decision maker with an overview of an issue or problem, normally in support of policy findings or recommendations. Briefing books are often accompanied by oral briefings that present the most important findings or recommendations. The decision maker then refers to the extended briefing book for the background information and deep analysis that supports the core findings and/or recommendations. Briefing books are both a complement and a potential substitute for the oral briefing. The executive summary serves the substitute function – it makes sure the briefee gets the gist of the analysis even if the briefing does not occur. The rest of the book is the complement, for going deeper before or after the briefing and/or to be distributed (in whole or selectively) to a secondary audience.

The Core Components of A Briefing Book

The briefing book should address the precise needs, expectations, and concerns of the decision-maker. The book should have a hub-and-spoke approach. The hub is the executive summary and the spokes are the various tabs. Your briefing book should:

- **Define the problem or issue.** Highlight implications or state significant findings based on the data.
- **Analyze--not merely present—the data.** Show how you arrived at the findings or recommendations through analysis of qualitative or quantitative data. Draw careful conclusions that make sense of the data and do not overstate or misrepresent it.
- **Summarize your findings or state recommendations.** Provide specific recommendations or findings in response to specific problems and avoid generalizations.
- **Generate criteria for evaluating data.** Explain the key assumptions and methodology underlying your analysis and prioritize the criteria you rely on to assess evidence.
- **Analyze the options according to your methodology and assess their feasibility.** What are the pros and cons? What is feasible? What are the predictable outcomes? Support your assertions with relevant data.
- **Address—and when appropriate rebut—counterarguments, caveats, alternative interpretations, and reservations to your findings or recommendations.** Your credibility as a team relies on your ability to locate and account for counterargument. You should be especially sensitive to the likely counterarguments your decision-maker faces in implementing or acting on your recommendations or findings.
- **Suggest next steps and/or implementation of the findings or recommendations.** Briefly address the feasibility of those next steps or the implementation.
- **Include any material specifically requested by your briefee. This could include, for example, a speech draft or press release.**
- **Include a summary of sources and resources utilized in preparing material.**

The Executive Summary

Once you have determined your dominant recommendation(s) or findings, you are ready to structure your briefing book and, when appropriate to your findings or recommendations, write the Executive Summary. The structure of the briefing book should follow the course of your recommendations, not the chronology of the problem or the development of your research. It can help to write a draft of the Executive Summary first as a structuring device, returning to it at the end of the writing process to make sure that it matches your analysis and outcomes.

Although the Executive Summary is the most important part of any briefing book, it is often the most difficult to write. Yet there are basic steps that will help turn complex ideas into succinct and powerful arguments guaranteed to capture the attention of a busy reader. You will, for example, need briefly to describe the current policy situation, offer immediate pros and cons of your reasoning for change, and explicitly state your recommendation/s or findings.

The Executive Summary serves as a starting point – but also the end point - and may be all the briefee has time to review. It telegraphs key recommendations, relying on your group's authority as researchers or experts in your field. It not only summarizes the key points for the busy reader, but highlights the recommendations in a memorable way to guide future discussions.

An effective strategy is to draft the Executive Summary as you begin writing as a device that structures the analysis that follows. The content of the summary should clarify the problem, and describe the main points that the decision-maker should know. The Executive Summary serves as a road map document, highlighting key themes and guiding the decision-maker's understanding of the longer document.

The Core Components of the Executive Summary:

As a general rule, the executive summary is no more than two, single-spaced pages but longer briefing books may demand longer executive summaries.

WHO and WHAT / WHERE

1. **Acknowledges** the target audience, the intended use(s)
2. Concisely **states the problem or issue** either in terms of current policy or as a problematic situation

WHY

3. Offers **reasons** for initiating changes to that policy or situation; explains why the issue is problematic
4. May signpost **key policy options** or approaches; sometimes this is simply stated as the status quo, sometimes it includes alternatives that seek to remedy or address the problem
5. May signpost the **pros and cons** of key options or may highlight the **general trends** in addressing the issue
6. May reference the **methodology** used to examine the data or explain core assumptions that guided research and analysis

HOW / WHEN

7. **Recommends** primary course(s) of action **or states findings** that may lead to recommendations in future policy work
8. Offers **supporting reasons** for selecting or highlighting that course of action or findings

The last sentence may offer a timeline for completion or set up a roadmap that tells the reader how the memo is structured.