How to Prepare and Deliver an Effective Briefing

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A briefing is not a speech

- A briefing is an interactive presentation, focused on helping decisionmakers learn from your analysis of a complex problem or opportunity.
- It cannot be *scripted* formally like a speech, but it can and should be *well-structured*.
- In general, you control the focus, but the brieefees may ask you to change the sequence, go back to a key point, or otherwise help them learn, and this is the very purpose. These are *opportunities* for you, not a sign of problems.
The tasks

- Know your audience
- Be clear on the purpose(s) of the briefing and the context (location, time, timing vis-à-vis decisions or actions that follow)
- Carry out your analysis and prepare recommendations
- Decide on your core messages
- Structure the briefing effectively
- Create visual elements as part of your message
- Practice, practice, practice
- Deliver responsively
1. Know the audience and context


- Context: How does your briefing fit into a sequence of analysis and action? Whose action?
2. Structuring: Linear is one way to go

- **Beginning**
  - Summarize the issues/questions
  - Supply the recommendations

- **Middle**
  - Frame the analysis
  - Analyze the issue
  - Highlight key findings

- **End**
  - Recap, synthesize, next Steps
Begin with the end in mind

- Purpose of the briefing
- Recommendations
- Roadmap – what structure do you use?
Middle: Presenting the analysis

- **Inductive Reasoning**
  - Put the bottom line on top
  - Use with reasonably receptive audiences
  - \( D = A + B + C \)

- **Deductive Reasoning**
  - Build the case, up toward conclusions
  - “Mystery novel” approach: what happens next?
  - Use with more skeptical or hostile audiences
  - \( A + B + C = D \)
Middle: Choose a structure

- Cause/Effect
- Problem/Solution
- Categories or elements of the problem
- Questions/Answers
- Chronological: emphasize historical background, current “state of play,” alternative futures
Begin and end with your message

- Highlight Major Points
- Summarize Recommendations
- Synthesize in light of problem/purpose
- Outline next steps

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Nonlinear: Hub-and-spoke structure

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Overview

- The hub-and-spoke is a well-tested structure for briefings aimed at busy decisionmakers.
- The “hub” is your core message(s), expressed in simple, action-oriented language. It’s the heart of what you want listeners to remember.
- The “spokes” are the components of the message, which lend supporting evidence or illustration.
- Each member of the team should be able to move the listener from hub to spoke (or vice-versa), as needed, at any point in the briefing.
Whatever structure you choose, you will need to tell the audience a story, in part with visuals ...
3. Visual storytelling

- The purpose of visual elements is to enhance *comprehension* and *retention* of important ideas. If a slide does not add value, drop it.
- Except in highly design-oriented or marketing-oriented presentations, the main purpose is not to *entertain* the audience per se, though creating visual interest helps engage us.
- The *visuals* and *spoken remarks* should be well aligned. This is the concept of a “visual storyboard” (outline) to help you sync the two.
Make your visuals count
Creating the visual elements

- Keep them simple
  - Average attention span per slide is 8 seconds
  - Most audiences can handle about 1 slide per minute of briefing
- Simplify technical concepts with metaphor

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The stretching of vorticity is a difficult physical concept, but comparing it to a skater's conservation of momentum helps to clarify what we mean.
Visual arguments need evidence

- Present evidence
- Teach with evidence
- Convince with evidence
Image quality matters

- Consider size: make images legible, intuitive, easily grasped
- Choose colors with care: simpler is often better (less distracting)
- Make quantitative data accessible: Use minimum 16-point font (general rule), use only the data you need.
- *Don’t include inappropriate visuals and then apologize for them during the briefing.*
- Size: Make images legible
- Consider colors
- Simpler may be better …
- Make data accessible
Focus on the overall composition

- What is the eye drawn to?
- Where does the reader want to focus?
- “Less is more”: use a few simple elements to make a point
Message content: Emotional arguments

- Use them sparingly, consider the audience’s receptiveness
- Have a single message
- Appeal to our values
- Create emotion: Outrage? Wonder? Delight?
- Move us to action
- Include evidence and examples (reason + emotion = powerful persuasion)
4. Deliver the briefing

- Focus and center yourself
- Show enthusiasm for your subject
- Be yourself—don’t imitate others’ styles
- Don’t read us a script—memorize your main points, keep notes at hand if you like.
- *Project* your voice so we can hear and engage with the topic
Preparing and handling questions

- **Preparing**: What doubts is the listener likely to have? Where will they want details or extra evidence? Where might they challenge us?

- **During the briefing**: Listen carefully. If you’re unsure about the question, summarize it and check.

  - Listen actively (nod, make eye contact, acknowledge)

- **Answer the question and move on**

- **If you don’t know or aren’t sure, say so; offer to check the facts and follow up, if appropriate.**
Rehearse

- Practice and time the briefing at least three (3) times: The dry run is one.
- Get feedback
  - **Content**: Is it clear? What’s persuasive and what’s not?
  - **Structure**: Is it working for you? Is there a better way?
  - **Delivery**: Is your body supporting the message or distracting the audience? Voice effective?
  - What are the main ways we can improve?
Rehearse

*If you’re on the sidelines:* maintain professional composure. You’re always “on.”

*If you’re speaking,* channel your energy, avoid distracting gestures.
Connect with the audience

- Use the terms that your audience knows
- Use examples to explain new ideas
- Engage the audience
  - Establish eye contact; look at *people* not the screen
  - Use friendly hand gestures
  - Speak to specific individuals if you know them
Connect with your audience

- A briefing is *two-way communication*
  - Pay attention to audience reaction
  - Modify your talk as needed (are they listening or doing something else?)
  - Look for nods, smiles and other cues to determine if your message is being received.
  - *Direct* your answer to a question to the person who posed it. Interact naturally, conversationally.
How do you look?

- **Where to Stand?**
  - If you need to pick a place to stand, make sure you’re out of the projection line.
  - Mediate between screen and audience: *Direct* our attention, you control the focus.

- **How to Speak?**
  - Project, Project, Project – Practice
  - Pause after complicated ideas
  - Avoid a “canned” sound: Don’t rely on a speech script, have a *well-informed conversation* with the listeners.
The briefing doesn’t live on the screen

- Don’t read the screen
- Say more than you show
- Handout more than you say
- Leave paper trail: important audiences may not be able to attend
Finish strong

- Try to recap your primary message
- *If culturally appropriate:* Thank the decisionmakers (or other audience members) for their time and attention.
- Offer to take questions (or more questions).
- During Q&A: Use your extra slides (not shown during main briefing), if appropriate, to extend or clarify your arguments, teach the audience more.
Special tips to teams

- Keep disagreements in perspective: different team members will have different instincts about some things;
- Don’t focus on dividing up “air time” (speaking time) evenly—focus on whatever will best inform the audience, be flexible.
- The team is always “on”: Even the members on the sidelines should reflect the team’s professionalism, avoid distracting side conversations or body language (e.g. fidgeting).
- Decide who will handle what questions and who will “direct traffic” (coordinate) to avoid awkward pauses.
Sources

Purpose, Movement, Color: A Strategy for Effective Presentations
By Tom Mucciolo and Rich Mucciolo, MediaNet, Inc., 1994

The Quick and Easy Way to Effective Speaking

The Visual Display of Quantitative Information