

## How To Excel At Briefing Senior Executives

Many people do a poor job briefing senior executives. This is not usually the result of inadequate ability. It is the result of not understanding the unique characteristics and ways of thinking that senior executives have. Briefings are more effective when the information in the briefing is adapted to their unique nature. And, the purpose of this article is to explain the nature of senior executives, and how to create successful briefings for these types of executives.

The first step in creating senior executive briefings is to understand some of the essential common and personal characteristics of senior executives.

Almost all senior executives share a set of common characteristics. They usually have **financial responsibility**. They usually have many demands on their **time**. They are usually focused on **long-term** actions, and **external** factors that impact their organization. And, they are usually **decision-makers**.

*These common characteristics mean that good briefings will typically describe the “Value Proposition” (dollar costs, benefits, and time span), will be concise and brief, will focus on broad scope and large impact issues, and will usually provide possible courses of action which require a decision.*

Also important are the personal characteristics of the specific senior executive. Every executive has a different **learning style**. Some people are auditory and prefer explanations. Some are kinesthetic and prefer hands-on information or demonstrations. Many learning styles exist. Executives also have a **functional role** (such as sales, marketing, finance, or chief executive). The functional role has an impact on the content and language used in briefings. And, executives usually are **team-oriented**. The opinions of key advisors and fellow executives are often important.

*These personal characteristics mean that good briefings will typically be constructed to best fit the learning style of the executive, will focus on the issues typical to the role of the executive, and will use the vernacular, or words, specific to the role of the executive (in other words, highly technical terms or jargon used in some other profession is inappropriate). Also, the amount of discussion and coordination with other key leaders can often be an important piece of information in a briefing.*

It is especially important to consider the senior executive characteristics of **time** and **financial responsibility**. These two characteristics are the main factors that shape the executive thought process. A briefing that is not adapted with these characteristics in mind is unlikely to be a success.

Executives know that their limited time means they will have to make decisions quickly, and often with imperfect information. They seek the minimum information necessary to make a good decision, presented in the minimum amount of time. And, faced with imperfect information the executive thought process is to extrapolate the information into risks, probable outcomes, consequences, impacts, precedence, and perception by others. This means that a briefing **must** provide only information that is essential and defines the impacts of the issue. And, to conserve time the briefing must be concise and use only words (vernacular) familiar to the executive.

Executives also know that they do not have the resources needed for all of the situations and opportunities they face. Executives think in terms of weighing alternatives and risks and setting priorities. Executives seek to assess all of the different issues against one another. The value proposition, in dollars, is the one common metric that allows meaningful comparison. This means that a briefing must depict the value proposition in order to be successful (this means all dollar costs and benefits, time spans, risks, and assumptions).

Knowing what information is important, and how to adjust it, is only one of two equally important aspects of creating an excellent senior executive briefing. Equally important is the process followed to create the briefing. The process has four basic tasks. The tasks are to **research** the issue and what the executive needs, **construct** the briefing, **refine** the briefing, and **rehearse**. Each of these tasks is necessary, and has a set of sub-tasks.

Research means to thoroughly investigate and understand the topic, what the executive wants to know, and how the executive wants the information presented. As a minimum, there are three sub-tasks:

**Issue.** Become the expert on the topic. Inadequate preparation annoys executives because it uses their time ineffectively. Poor preparation also creates doubt about credibility (and is often damaging to a career).

**Preferences.** Make an appointment to interview the executive's Executive Assistant or Secretary. Ask them what kind of briefing the executive prefers (learning style). Ask for a copy of a previous briefing that was a success. Use it as a guide.

**Guidelines.** Take time to understand the parameters for the briefing. This includes how much time is allotted for the briefing, what kind of briefing the executive wants (almost always a decision briefing unless the executive explicitly asks for status or overview information), if the briefing is verbal or prepared (text or slides), and any other limits or wants.

Construct means to build the rough outline of the presentation. As a minimum there are three sub-tasks:

**Page Budget.** For a written slide presentation plan on a maximum of 6 to 10 pages that contains no more than 4 to 9 bullet points, per hour of briefing time.

**Key Elements.** Add just the critical information. The critical information is the purpose or situation, the value proposition, and key facts, assumptions, and coordination.

**Content and Order.** Add the remaining information that might be used in the briefing. Reorganize the order of information to create a smooth, logical progression.

Refine means to remove simple errors, reword items into words familiar to the executive, and remove unnecessary information. This task should be done iteratively. Suggestions from others are also beneficial. As a minimum, there are three sub-tasks:

**Learning style.** Format the briefing to use numbers, text, pictures, or simulations, or whatever manner or style best suits the preferences of the executive. Interviews with the Executive Assistant or Secretary and prior briefings are very helpful guides.

**Language.** Remove jargon, excess acronyms, reword as needed into words familiar to the executive, and reword to make meanings more precise. Also, avoid using words that have gained negative connotations within the organization.

**Brevity.** Remove information that is not absolutely essential. Place this information in an addendum. Bring the addendum to the briefing. The addendum is used in case the executive may require more detailed information. Deciding what information is not essential is a complex topic, and different in every circumstance. However, one useful rule is that if neither inclusion nor exclusion of the information would change the overall decision, then the information is not essential.

**Errors.** Check for things like capitalization or punctuation consistency. While not essential, many executives find inconsistencies very annoying, and assume the briefer is less credible because they don't pay attention to detail.

Rehearse means to practice the briefing and make adjustments that practice reveals are necessary. As a minimum, two of the three sub-tasks are required:

**Questions.** Anticipate possible questions that might occur to the executive at various points in the briefing. Develop good, concise answers. This might include coordinating with another executive who will be at the briefing and answer the question. It is helpful to have a short, written list of questions to take to the briefing, and refer to. This sub-task is extremely important because it uses time efficiently and results in a briefing that indicates attention to detail, which enhances credibility.

**Delivery and Timing.** Practice the briefing, and use a clock or stopwatch to determine the duration of the briefing. Include interruptions for some of the questions identified in the sub-task earlier. If the briefing is too long or too short, go through the process of refining the briefing further. Do this sub-task multiple times to ensure an average time. And remember, never, NEVER deliver a briefing by just reading aloud the points listed in the briefing. Use the points as a starting point and explain the implications and scope that each point is meant to represent.

**Critique.** Practice the briefing in front of peers, the boss, a senior executive willing to help, or some other person in the organization. The purpose of this kind of practice is to get helpful advice that can further improve the briefing. This isn't always a necessary step, but should be considered when the importance of the briefing is high and there is adequate lead-time.

To recap in checklist form, successful executive briefings:

- ☑ Define the Value Proposition (dollar costs and benefits, and time spans)
- ☑ Maximize Time (concise, precise, familiar language)
- ☑ Have an appropriate functional topic
- ☑ Have appropriate scope and impact
- ☑ Ask for a decision or guidance
- ☑ Fit the preferences of the executive (learning style, opinions of others)

And, a proven successful process for creating executive briefings is:

**Research:**

- ☑ Issue.
- ☑ Preferences.
- ☑ Guidelines (time allotted, purpose, requested items)

**Construct:**

- ☑ Page budget (6-10 pages per hour)
- ☑ Key elements (Purpose, Value Proposition, Facts, coordination)
- ☑ Content and Order (Other information and sequence)

**Refine:**

- ☑ Learning style
- ☑ Language
- ☑ Brevity
- ☑ Errors

**Rehearse:**

- ☑ Questions
- ☑ Delivery and Timing
- ☑ Critique

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The author, Ray Lewis, has over 35 years of experience ranging from startup to Fortune 100 companies, working in Asian, Latin, and U.S. markets, for government and commercial industry. He is the author of numerous articles and copyrighted technology and methodology innovations, nationally recognized, and is the founder of Envision Solutions company.

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