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5.2 Tips for Making a Quick Oral Briefing

You wrote a great briefing note, and it has been through all the review and edit hoops and is on its way to the Minister for the meeting. The Deputy Minister has asked that you attend the meeting with her as back-up, something you have done before. The item is scheduled for 20 minutes. As you arrive, you are told by the Executive Assistant that the Minister has only five minutes at most and that you should give a three-minute summary of the note. But, as the meeting progresses – or doesn't – it gets bogged down and you are asked to walk with the Minister and brief him in the elevator to his car. Never happens? Well, the reality is that it happens all the time.

This section will cover the key elements in creating a quick verbal summary. Some of the names for this are:

- The Elevator Brief (or Pitch)
- Oral Executive Summary
- Snapshot Presentation
- Walk-with-Me Briefing
- Run-Me-Through-the Highlights Quickly Briefing

How to be Ready for a Quick Brief

- **Assume It Will Happen:** This is a matter of being ready. To that end, a good quick brief begins with a well-written brief. Take that and distill it into key messages.
- **Yellow Mark Key Points:** Take the written brief and mark five key points that
 - State the **objective** of the note: inform, decision, update, meeting. Example: "The note recommended you support Minister Y at the next meeting you are attended. She wants to change the regulations on carbon levels."

- State what are the **listener's interests, risk or opportunities**. Example: "This is her file, but we have an interest and have been fully involved in preparing the regulation. Good collaboration."
- State whatever **decision, key message or information** item you want left in the listener's mind at the end. Example: "We recommend you supporting her."
- State what the listener **might say**. Example: "You might want to note that we have been fully involved." Or "You might want to note that this completes the policy work we began with her two years ago."
- **The Bullet:** Out of these points, create a quick 15-second bullet message to start and end your briefing with. Example "We recommend support Minister Y's proposals at your next meeting ."
- **Practice Until It Becomes Natural:** Take you key points and speak it out loud. Time it. Get someone to critique it. Over time, this form of briefing will become more natural, but without preparation, it can be unnerving.
- **Loop Back:** Remind the listener that they still have the full note in their file. Also remind the listener that you are around (Where's your business card? In your hand, right?) for any other questions.
- **This is Verbal. You will be Interrupted:** One of the challenges of verbal briefings on the run is that the listener might not be compliant, quiet and entirely focused on you and your brilliant summary. Expect there to be interruptions. Provide a point of clarity if asked, but then return to the magic five points.
- **Prepare the Listener to Use Your Words:** One of the objectives of many briefings is to equip the listener to speak to an issue, support your position as her own or explain a policy matter to someone else, your listener's boss or colleagues for instance. So, prepare your oral briefing so that the listener can repeat it should he wish to do so.
- **Write Key Points and Take-Away or Have it on Your Phone Ready to Read or Text:** Having the quick summary in point form so that you can quickly text it to the listener is a great idea, but you have to speak it as well.

Points on How to Handle Interruptions

You seldom own the meeting in which you are doing the briefing. So understand quickly that they dynamic of what is going on can be complex and messy. Who else is in the room? Is it your boss? Are peers present for this briefing or just waiting to for you to shut up so they can then shine? What is the style of the person being briefed? Interruptions can come in many forms but you must understand that they will happen. They may, if you are lucky, just be a question of clarification? However, they might be an opinion or supposedly clever side comment meant to amuse. They may also be disruptive or even

subversive (what are friends for in a bureaucratic setting?). Your audience may also be an argumentative person who likes to think out loud and you, be your choice of words or even mention of someone else, set them off. No matter what you do, interruptions will occur. Here are some strategies for dealing with them:

- **Control:** Whose meeting is it? The interruption may come from the person in charge and so, stand back, and let it flow.
- **Bridge:** Answer the question and bridge back to the briefing, as in “Yes, it is was \$350 million last year and our recommendation here is to move that forward to \$395 million.” This is bridging.
- **Deflect:** Especially if there is a peer interruption, deflect to later: “I can get back to you.” Or “I don’t have that here but will follow up.”
- **Time Closure:** Try to remind the listener or interrupter of the time constraint as in “I am sure we can get to that once we work this through.”
- **Life Jacket:** Look for your boss for help to get things back on track.
- **Go with Flow:** Depending on your level and relationship with the listener, an interruption may well open a Pandora’s box of other issues way beyond your level of control or pay grade. There are times that these discussions are useful ways for decision makers to think out loud or sound off. Just understand that it is the use who is being served and not your need to get to the end of your piece of brilliant briefing.

Mistakes to Avoid

- **Speaking Too Fast:** An even pace is easier to hear and listen too. It is a common error, mostly generated by anxiety in the speaker, to think that talking fast will add more information. The reality is that people hear only so much and absorb only part of what they hear. Further, someone talking fast sounds panicky or anxious, reducing the professionalism of the delivery.
- **Lack of Focus:** Go back to the five (maximum) points you had written down. Stick to them. This is not a conversation about the weather. Stick to the key elements.
- **Using Technical Terms, Acronyms or Slang:** Context is everything in this potential error. If the listener knows the technical term or acronym, go for it. It shortens your presentation. However, your objective is to make this as easily understood as possible.
- **Don’t Make the Listener Feel Dumb:** Quick briefings can sometimes frustrate dedicated writers and analysts as superficial. They are, but only to a degree. They are necessary. Therefore, don’t say “That’s too complicated to explain here.” Or “You wouldn’t understand without the details.” Rather, turn it into an

opportunity as in “The details on this are in the Briefing Note and we can perhaps get to that another time.” Or “I don’t think these matters will come up as you only have ten minutes on this one.”

- **Being Robotic:** Nothing diminishes the effectiveness of an oral briefing than a monotone, rote-like diction. The aim is to be conversational and relaxed, even though the circumstances are often not relaxing. The objective is to make sure the listener hears and finds useful what you have to say to meet his or her needs. It is also to create a good impression on the listener so that they see your advice as helpful and trustworthy.