

Briefing Executives

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So, you are on the calendar to brief a general or flag officer or senior executive. You are understandably anxious—there’s a lot at stake. You need approval of your plan in order to move forward. You have to report some bad news. Or maybe it is just an information brief to someone with a reputation for asking hard questions.

First, congratulations. You made it on the executive’s calendar—no small feat. You have been given 45 minutes of this individual’s very valuable time, and you know you need to make the most of it. So now what? How can you best prepare?

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Plan the Content

What is the purpose and intended outcome of the meeting? Is your briefing only for information, or are you making a request or expecting a decision? Are you bringing a good news story, or hand-delivering a catastrophe? Do you have a good plan for the way ahead, or are you reaching out for help? Did you ask for the meeting, was it requested by the executive or was it thrust upon you by some intermediary? All these factors, and more, will influence the content and presentation. Let's look at some of them in more detail.

Information Only: If the sole reason for the meeting is to provide information, consider whether a meeting actually is necessary. Would the general prefer a short point paper or

Good News vs. Bad News: Obviously, the tone of the meeting will be different depending on the type of news you are trying to convey. Good news is easier to convey than bad news, and you must be better prepared to explain what happened and how you will turn the bad news into better news before the next meeting. Explaining bad news usually requires a chronology of events that led up to the catastrophe, the damage-control measures you put in place, what you have learned from the experience, and your plan or recommendation for picking up the remaining pieces and moving forward.

General Rules for Content: Whatever the purpose or occasion for a briefing, here are some general considerations for its content:



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an annotated slide deck to review at his leisure? Ask the executive or military assistant whether this would suffice. They may jump at the chance to fill your time slot with something more urgent and drop your paper or brief into the general's weekend read package. If the general wants a follow-up meeting after reading your package, he will be more prepared and likely will have more insightful questions for you to focus your efforts.

Meetings for Decisions or Help: If you need a decision or executive-level help, make that clear up front to help the leader focus on evaluating the options you provide, asking key questions, and being prepared to make the call at the end. Be sure you discuss the major alternatives you have considered, including the pros and cons of each. Summarize any supporting technical and programmatic data, differences between the options, and your recommended course of action. You want the executive to know you've done your homework. Don't be surprised or hurt, however, if the executive doesn't accept your recommendation at face value. He or she will undoubtedly have many questions for you to answer and clarify, and, in the end, the executive may decide on a different alternative, a combination of alternatives or an entirely new one you had not considered. You may even be asked to go away and do some additional work. That's OK. Your efforts should result in a decision the leader is comfortable with. Otherwise, why would you ask him or her for a decision in the first place?

- Make sure the briefing is logical and flows well. Unless otherwise specified by the executive, organizing your brief in a point paper fashion often is best—issue, background, discussion, recommendation.
- Ask colleagues to red-team your content to find flaws in your logic and to help formulate likely questions.
- Never put anything on a chart you cannot fully explain.
- Consider creating a BLUF (bottom-line up front) chart to lead off the briefing. Here you can describe the purpose, key points of your brief, and summarize your recommendation. This preview helps the executive quickly understand the overall context before being deluged with the details.

Consider the Format

First, do you need slides? If they are needed, make sure the slides facilitate and complement the discussion. Don't make your slides with lots of transitions and animations—cute slides are distracting. You want the executive to concentrate on what you are saying and not be mesmerized by your visuals.

Build your slides with a laser-like focus and direct, logical path from the issue to your recommendation. Keep it short—after all, it's called a "brief" for a reason! You shouldn't have more than 10 charts—ever. Five is better. Backup charts are OK, but only the essential ones. Know exactly which one to pull up to answer any question with no aimless flipping through your stack.

Storyboard your slides and audio to ensure you convey the content in a logical and understandable manner. Have staff or colleagues critique the presentation ahead of time to find any flaws and to prompt you with any likely questions or concerns that may come up at the real meeting. Then practice, practice, practice.

Use pictures or graphs where possible to clarify and simplify. Show a funding vs. time chart to illustrate the dip where additional cash is needed. This is much more understandable than a spreadsheet table. When words are needed, use short bullet phrases to highlight your points. Never read your chart to the executive—he or she can read. If you worry that bullets may not convey the full meaning, consider elaborating in speaker’s notes or create an accompanying point paper to leave behind.

If the executive’s staff has specified a standard briefing format or template, stick to that and don’t deviate. Executives often use standard formats enable them to quickly pick out information they need, knowing exactly on which slide it will be located. It’s simpler to find, digest, understand and compare information in a standard format. If you need to convey information that doesn’t fit well with the template, do so in the discussion and, if necessary, bring a backup slide.

Consider Your Delivery

Plan that half your time will be devoted to the briefing and half to discussion and questions. But never be a slave to this formula. If the leader has previewed the read-ahead, you may spend all the time discussing and answering questions. Some leaders will interrupt constantly to ask questions or discuss each point. Go with the flow. Read the body language and provide the executive with information in whatever delivery method makes sense to the executive. Hint: You can often get tips about the executive from his or her assistants. Call the assistant and see if you can get any insights regarding the executive’s preferred briefing styles and whether there are any personal quirks or hot buttons to avoid.

In delivering your briefing, always be open, transparent and truthful in your discussions and answers to questions. Be confident and realize that you are probably the most knowledgeable person in the room about the particular topic under discussion. Recognize that executives have their own filters and biases and may not see things the same way you do, so don’t hesitate to gently and tactfully clarify any misunderstandings. Your overarching goal is for the leader to leave the room with a full understanding of the important issues and having made a good decision based on facts and inputs, tempered by his own best judgment. Be aware, however, that the executives might have information you are not privy to that will factor into their decision making. Respect that, but don’t be afraid to respectfully ask for help understanding their rationale and insights—most leaders will discuss that, if asked.

As an example, some years ago, Navy RADM Wayne Meyer, the “Father of Aegis,” was asked to lead a team to assess the readiness of an experimental high-energy laser to conduct tests against simulated cruise missile targets. Throughout the early part of the meeting, he continued to express skepticism that the system could track the target at low altitude. He was seeing the tests through his considerable experience with radars and needed to be convinced that our infrared tracker would work just fine. After a lengthy technical explanation and many questions, he acknowledged the misunderstanding, and we were able to move on. Getting up the nerve to push back wasn’t easy—Meyer had a reputation for gruffness and great technical astuteness. In the end, I think he appreciated the discussion. On the other hand, there were many times during the readiness review when he offered insightful observations based on his many years of solving difficult technical problems. When he spoke, we always listened.

Always Have a Contingency Plan!

You’ve made the preparations, you have the briefing slides, your audio track is well rehearsed, and it is Show Time. As you arrive in the executive’s office suite, the assistant notes that the executive is “running a little behind.” The current meeting eats up 15 minutes of your briefing, and the assistant notes that the executive has a hard stop in 30 minutes. What do you do?

This is not unusual, so you need a contingency plan. Since it is unlikely you can get through your entire slide deck and audio track, you need to have chart-level takeaways and key points so you can quickly explain each chart without going through every bullet point in detail, answer any questions and move on. Remember, the discussion is what matters, so leave time for that no matter how short the meeting.

If your meeting gets cut even shorter, having a BLUF chart, explained earlier, may be your lifesaver. Use the chart to brief the key ideas and generate discussion. You may be able to make your points and get a decision in 10 or 15 minutes this way.

Finally, if your time slot is completely clobbered, you may be able to buttonhole the executive as he walks down the E-ring to the next meeting and give your two-minute “elevator speech” that summarizes the issues. You may not get a decision, but you can convey the importance of getting back on the calendar and teeing up some of the key information for the executive to consider in the meantime.

Summary

General officers and senior executives are busy people with much on their minds. They receive hundreds of briefings every month and often make dozens of key decisions every day. Being prepared, getting quickly to the point and offering a thoughtful recommendation will help your busy executive make the best possible decision in the limited time available. 

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