

Transcript | How to Craft a Brilliant Briefing Note

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00:00:10.240 --> 00:00:20.009

Ula Rutkowska: Hello, everyone. Welcome to today's event. I am just going to let people slowly trickle in.

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00:00:20.010 --> 00:00:32.809

Ula Rutkowska: from the waiting room and into the event, and once I see the numbers stop ticking up at an extremely fast rate, that is when I will officially kick us off and start, start, start...

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00:00:32.880 --> 00:00:36.860

Ula Rutkowska: start us off. Alright.

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00:00:37.760 --> 00:00:57.519

Ula Rutkowska: Well, first of all, hello and welcome to this event on crafting a brilliant briefing note. My name is Ulla Rutkowska, and I'm a researcher here at Apolitical. It would be great to hear from all of you, so do post in the chat where you're joining us from and what organization you work for.

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00:00:57.790 --> 00:01:13.660

Ula Rutkowska: Today, we will be looking, at how public servants can craft briefing notes that cut through complexity and support better decision making. We'll learn approaches to audience, format, tone, and information delivery.

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00:01:13.660 --> 00:01:22.550

Ula Rutkowska: Whether you're writing for ministers, senior leaders, or colleagues, this session is about helping your message land quickly, clearly, and with impact.

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00:01:23.080 --> 00:01:33.770

Ula Rutkowska: For those of you who may be joining us for the first time, welcome. AP Political is the world's largest online network of public servants with a mission to make government smarter.

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00:01:33.880 --> 00:01:47.519

Ula Rutkowska: It is used by half a million public servants and policymakers across 170 countries, providing governments with the tools, skills, and networks they need to become more effective and tech-enabled organizations.

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00:01:48.410 --> 00:02:13.299

Ula Rutkowska: Apolitical is a strategic partner to governments, helping them prepare their workforces for the future. We achieve this by upskilling government workforces through short online courses focused on government priorities, enabling them to find and share best practice through peer communities, and building innovative tools designed for and with governments. So, I'm now going to just take a quick moment to look at who is joining us

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00:02:13.300 --> 00:02:16.760

Ula Rutkowska: here today by spending a moment in the chat

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00:02:16.760 --> 00:02:24.620

Ula Rutkowska: And... there we go. Alright, we've got loads of people joining us today, so we... I see we have folks from...

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00:02:24.620 --> 00:02:44.009

Ula Rutkowska: Oh, they're coming in super quick. So, from Peterborough in the UK, we've got, Scotland, Saskatchewan, Canada, Edmonton, alright, New Brunswick, Ontario... We've even got some folks from Mexico City.

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00:02:44.960 --> 00:03:02.469

Ula Rutkowska: From Newfoundland, from Cardiff, from Scotland, from... oh boy, it just keeps going, doesn't it? From Jersey, so from quite nearby to where Apolitical is based in London, all the way to various other parts of the world. So,

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00:03:02.470 --> 00:03:11.199

Ula Rutkowska: Alright, we're thrilled to extend an invitation to join today's speakers and your peers in public service from across the globe

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00:03:11.200 --> 00:03:14.409

Ula Rutkowska: in the writing effectively in government community.

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00:03:14.410 --> 00:03:33.169

Ula Rutkowska: This is a community of practice where you can share advice, insights, and resources on government writing with peers across the global public service. This community is open to all apolitical members. The link is now in the Resources tab at the bottom of your screen, and my colleague is also posting a link in the chat now.

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00:03:33.170 --> 00:03:37.800

Ula Rutkowska: Do take a look, and we'd love to see your voice in that community.

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00:03:37.840 --> 00:03:44.890

Ula Rutkowska: So, before we actually kick on with today's event, I want to get a few technical notes out of the way.

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00:03:45.040 --> 00:03:52.020

Ula Rutkowska: This event is recorded, for on-demand viewing on the Apolitical website, so please don't record it yourself.

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00:03:52.140 --> 00:04:04.250

Ula Rutkowska: Contact details for privacy concerns are in the apolitical homepage footer. Closed captions are available and can be toggled on or off in your screen settings.

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00:04:04.430 --> 00:04:05.200

Ula Rutkowska: So...

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00:04:05.450 --> 00:04:13.050

Ula Rutkowska: Before we introduce our speakers, we are going to run a few quick polls to get a sense of where you're coming to today's discussion from.

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00:04:13.290 --> 00:04:27.339

Ula Rutkowska: Now, the first poll is... what do you usually spend the most time on when writing a briefing note? Option 1, researching or gathering evidence. Option 2, writing and editing the content.

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00:04:27.340 --> 00:04:49.660

Ula Rutkowska: Option 3, getting input or approvals. Option 4, formatting and presentation. And option 5, making sure it's aligned with policy priorities. So, please take a moment to complete

the poll. The question is, what do you usually spend the most time on when writing a briefing note?

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00:04:49.780 --> 00:05:07.149

Ula Rutkowska: So, what I'm seeing so far is actually a close race between researching or gathering evidence and writing and editing content. So, still seeing loads and loads of responses coming in, so I'll give them a moment, but I'm curious to see where we ultimately land.

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00:05:08.410 --> 00:05:09.880

Ula Rutkowska: Alright.

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00:05:10.730 --> 00:05:12.980

Ula Rutkowska: So, we do have a winner.

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00:05:12.980 --> 00:05:34.690

Ula Rutkowska: What do you usually spend the most time on when writing a briefing note? It is on writing and editing the content, followed by researching or gathering evidence. Alright, thank you, everyone. It's time to move on to the second poll, which is, what would make writing briefing notes easier or more effective for you? So...

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00:05:34.690 --> 00:05:59.679

Ula Rutkowska: Basically, what would make your life just a lot easier when it comes to writing a briefing note. Option 1, clear templates or frameworks. Option 2, better writing training. Option three, more feedback from leadership. Option 4, more time to focus. And option five, shared examples or peer support. So, I'm still seeing responses coming in, but as a reminder.

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00:05:59.680 --> 00:06:00.450

Ula Rutkowska: reminder.

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00:06:00.450 --> 00:06:19.929

Ula Rutkowska: What would make writing briefing notes easier or more effective for you? Option 1, clear templates. Option 2, better training. Option three, feedback from leadership. 4, more time. I think at least I am always looking for more time. And five, shared examples or peer support.

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00:06:20.120 --> 00:06:38.909

Ula Rutkowska: Alright, it looks like we are wrapping up, and we do have, clear templates or frameworks as what is emerging as the thing that would make writing briefing notes substantially easier for people. Alright, thank you so much, everyone.

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00:06:38.910 --> 00:06:44.059

Ula Rutkowska: Now, it is time, to introduce our speakers.

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00:06:44.780 --> 00:07:05.829

Ula Rutkowska: Today, we're fortunate to have two brilliant guests, Lucy and Claudia, joining us today. Lucy Duchateau is an Associate Political Affairs Officer in the UN Front Office Political Affairs Division, supporting the Special Envoy's Mandate in the Great Lakes region and delivery of the UN Peacebuilding Strategy Action Plan.

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00:07:05.830 --> 00:07:14.359

Ula Rutkowska: She has more than 6 years of UN experience, and has worked with the EU delegation to the UN, AFD, and NGOs in Brazil.

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00:07:14.650 --> 00:07:30.889

Ula Rutkowska: Claudia Chernilogar-Dwyer serves as the Head of Communication Unit at the European Commission's Directorate General for Regional and Urban Policy, working to showcase the value that EU funding brings to Europe's economy and its citizens.

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00:07:30.890 --> 00:07:40.159

Ula Rutkowska: Previously, she held management and policy roles in various European Commission other departments, as well as in the European Civil Society.

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00:07:40.330 --> 00:07:56.879

Ula Rutkowska: Alright, before we launch into today's case studies, I thought we could start with a quick icebreaker question, just to get us warmed up. So, Lucy and Claudia, what's the weirdest or most unexpected thing you've ever had to include in a briefing note?

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00:07:57.180 --> 00:08:22.149

Ula Rutkowska: I will give you a moment to think about that. Everyone else, so everyone attending the event today, I pose the same question to you, and please do respond with your answer in the chat. And that question, again, is, what's the weirdest or most unexpected thing

you've ever had to include in a briefing note? Alright, Claudia, I'm gonna come to you first. What's the weirdest or most unexpected thing you've had to include in a briefing

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00:08:22.150 --> 00:08:22.660

Ula Rutkowska: out.

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00:08:23.450 --> 00:08:36.289

Klavdija Černilogar Dwyer: Thank you, Ulla, and hi to everybody. Well, I used to work a lot with a senior official in the field of education and culture in the past. This was back in the days when I was still writing briefings myself.

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00:08:36.780 --> 00:08:46.589

Klavdija Černilogar Dwyer: And, there was a time when somebody from a very high-end fashion house announced themselves to be coming to visit my boss.

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00:08:47.200 --> 00:08:57.029

Klavdija Černilogar Dwyer: And we all thought, okay, these people probably want to do something with culture, they want some funding, that must probably be it. So I prepared a briefing on culture and funding.

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00:08:57.410 --> 00:09:06.340

Klavdija Černilogar Dwyer: And then my boss comes back and says, well, actually, can you go and research the jasmine fields in Italy? And include that in your briefing as well.

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00:09:06.480 --> 00:09:14.650

Klavdija Černilogar Dwyer: And to me, that was extremely unusual. I was like, okay, there's many random things we do, but jasmine fields in Italy, I've never looked at before.

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00:09:15.160 --> 00:09:17.440

Klavdija Černilogar Dwyer: So, I went and did it.

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00:09:17.930 --> 00:09:29.440

Klavdija Černilogar Dwyer: And at that point, he didn't tell me why, but then I accompanied him to this very meeting, and it turns out that this high-end fashion house was going around all kinds of institutions.

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00:09:29.500 --> 00:09:43.860

Klavdija Černilogar Dwyer: trying to get money, but in exchange for money, they would invite senior officials to go visit the jasmine fields of Italy to see where they collect the jasmine for perfumes, where they, you know, where they do their high-end stuff.

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00:09:44.040 --> 00:09:53.220

Klavdija Černilogar Dwyer: So, what seems to be a very strange element of a briefing turned out to be extremely useful, because it helped my boss at the time

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00:09:53.220 --> 00:10:06.320

Klavdija Černilogar Dwyer: show that he knows something about it, and also very politely say, thank you very much, but no thank you. I'm not going to take up your lobby opportunity, and I'm gonna keep doing my work for myself in the usual way.

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00:10:06.320 --> 00:10:23.950

Klavdija Černilogar Dwyer: But yeah, I've never forgotten the jasmine fields of Italy. Alright, excellent. Just a reminder, if anyone else has an example a bit like the jasmine fields of Italy, please post them in the chat. What's the weirdest or most unexpected thing you've ever had to include in a briefing note? Alright, Lucy, over to you.

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00:10:25.600 --> 00:10:30.710

Lucie Duchâteau: Yes, thank you very much to be given the opportunity, and hi to everyone.

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00:10:30.740 --> 00:10:39.450

Lucie Duchâteau: I believe, one of the weirdest things I had to brief on was at the time that I was working as,

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00:10:39.470 --> 00:10:53.489

Lucie Duchâteau: Civil Affairs Officer for UNMIS, which is the UN peace operation in South Sudan. And, the briefing wasn't about, you know, peace agreement, or security council dynamics, troop movements, which was usually what we would cover.

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00:10:53.560 --> 00:11:09.680

Lucie Duchâteau: But it was about, the ownership of a goat. So, basically, what happened is, you know, a local dispute erupted over, the ownership of a goat, and there was some, you know, cattle, cattle keeping issue at the time, and...

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00:11:09.680 --> 00:11:21.749

Lucie Duchâteau: It sounds quite trivial, you know, but in that context, it's important to understand that livestock is really, you know, wealth, it's a status, it's often even survival in South Sudan.

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00:11:21.860 --> 00:11:46.800

Lucie Duchâteau: And so, that disagreement sparking over, you know, one community stealing a good from the other one can actually risk sparking massive violence in communities that are already very much understrained. Yeah, so there I was, you know, drafting a briefing note on a day on good-related tensions in eastern Equatoria state. I thought it was very funny. I imagine maybe it will make it to New York, and some diplomats will read it.

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00:11:46.800 --> 00:11:48.200

Lucie Duchâteau: Over there.

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00:11:48.200 --> 00:11:51.869

Lucie Duchâteau: But I think the lessons for me was that

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00:11:51.870 --> 00:12:08.979

Lucie Duchâteau: When we brief in political affairs, sometimes the unexpected is often the most important, and a good briefing note doesn't just cover, you know, the big geopolitical kind of headlines, but capturing those, like, small, little local triggers can also have impactful consequences.

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00:12:10.290 --> 00:12:11.200

Lucie Duchâteau: Hover.

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00:12:11.370 --> 00:12:32.760

Ula Rutkowska: Great, well, wonderful. Thank you so much both. I'm glad that you managed to squeeze in some pretty hilarious examples. I've not seen many shared in the chat, but perhaps as our speakers present and go through, what they're sharing in detail, you can keep dropping them in in case anything comes to mind. Alright, so...

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00:12:32.760 --> 00:12:44.470

Ula Rutkowska: And also, just a quick reminder for me to please remember to keep sharing any questions that you have for today's speakers. We have a lot of questions that you have already submitted.

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00:12:44.470 --> 00:13:02.659

Ula Rutkowska: But just... just a reminder to keep those coming as the event proceeds. Alright, so, it is now time to hand over to you, Lucy, to give us your presentation. So, here we go. For the next 15 minutes, you've got the stage.

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00:13:04.560 --> 00:13:09.379

Lucie Duchâteau: Thank you so much, brilliant. Thank you, Joel, as well, for, projecting on my behalf.

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00:13:09.530 --> 00:13:15.969

Lucie Duchâteau: So I'm really glad, to be able to talk with you guys today on how to craft a brilliant political note.

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00:13:16.330 --> 00:13:33.149

Lucie Duchâteau: Thank you for the next slides. I will basically, show you the brief, you know, outline of what I would like to touch upon. The context, so in which context are you writing your briefing note, objectives of your writing, some techniques.

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00:13:33.150 --> 00:13:38.349

Lucie Duchâteau: And as well, the structure of your writing. And here, on the side, I have put a little code.

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00:13:38.580 --> 00:13:51.890

Lucie Duchâteau: that I really like, you know, the skill of writing is to create a context in which other people can think. I like it because I like to imagine writing as an opening and enabling kind of tool. Next, please.

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00:13:54.440 --> 00:14:07.139

Lucie Duchâteau: So, context. What really matters when you write? To me, that might be subjective, and please, you know, share your views on this, but to me, the who is really what will matter the most when you write your reports, because

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00:14:07.220 --> 00:14:14.520

Lucie Duchâteau: You know, what you will report about and how you will report, we very much derives on the question first to who do you report to?

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00:14:14.660 --> 00:14:32.279

Lucie Duchâteau: So, you know, the tone, the depth, the focus, and the format, all of these will be shaped by who will receive your report. And it's important for you to bear in mind that, of course, different audiences have different expectations, depending on their role, on their expertise, even on their personal preferences.

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00:14:32.390 --> 00:14:39.360

Lucie Duchâteau: And if you ignore this, there's a real risk that your message, is misunderstood or even overlooked.

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00:14:39.560 --> 00:14:47.889

Lucie Duchâteau: I can give a very brief personal example in my, you know, previous, work experience reporting to UN senior officials.

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00:14:47.890 --> 00:15:01.979

Lucie Duchâteau: I really had to adapt from various leadership styles, and one of my supervisors loved details, you know, he wanted context and background, and it almost felt like preparing, like, a thesis report every time.

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00:15:01.980 --> 00:15:18.819

Lucie Duchâteau: And another one had no patience for detail. You know, he used to just tell me, I want, flesh, I don't want flesh, I just want bones. And for him, you know, it was just those perfect 3 bullet points that he can write, he can read, sorry, from

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00:15:18.890 --> 00:15:37.380

Lucie Duchâteau: elevator to the meeting room, and that was it. So, I think one... one key message here is not so much what's the right, what's the wrong approach, I think there's none. The only key is really your capacity to adapt, and to make sure that, you know, your message lands properly.

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00:15:37.670 --> 00:15:44.880

Lucie Duchâteau: Coming to the how, once you've responded to the first question, it should be easier, for you to frame your report.

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00:15:45.160 --> 00:15:56.779

Lucie Duchâteau: How formal should it be? How direct or indirect can it be? Of course, here you will need to be sensitive to the hierarchies, the values, the norms.

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00:15:56.780 --> 00:16:08.460

Lucie Duchâteau: And when you write a political report, one key question, of course, is how diplomatic should you be? And that touches to the code that is here on the bottom of the slides.

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00:16:08.550 --> 00:16:21.479

Lucie Duchâteau: You always need to, I think, consider confidentiality. What could happen if, for example, there's a leak of your report, in terms of the words that you've used, and if the report is made public.

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00:16:21.830 --> 00:16:33.539

Lucie Duchâteau: you know, what could happen. I don't know if it ever happened to one of you in the room that, you know, a confidential report ended up leaking, but that's a real consideration to always have in mind.

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00:16:33.540 --> 00:16:44.849

Lucie Duchâteau: Coming to the when, of course, it will depend on the urgency of the situation. Is your report a routine report, a crisis report? And, from that, you will have to strike a balance, you know, between the depth

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00:16:44.950 --> 00:17:02.539

Lucie Duchâteau: of the speed and the clarity of your reports. This one is not always easy to, to find. I, myself, in my previous experience in the UNOCC, which is the hub, in HQ, for, Crisis Center.

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00:17:02.640 --> 00:17:15.170

Lucie Duchâteau: we were pretty much always on crisis mode, because you need to report, you know, from major crisis or conflict situation happening within UN peace operation, at 8 AM in the morning.

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00:17:15.170 --> 00:17:29.440

Lucie Duchâteau: from the day before, or even sometime from the same morning. And therefore, it was quite hard for us in that context to try and identify trends, you know, and, you know, analyze patterns, because really, sometimes you just need to stick to the facts.

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00:17:29.440 --> 00:17:38.830

Lucie Duchâteau: and be, you know, short and sharp, and make sure that you support decision makers. So, always being mindful, of the when. Next slide, please.

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00:17:42.150 --> 00:17:44.549

Lucie Duchâteau: Now the objectives.

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00:17:44.600 --> 00:17:55.969

Lucie Duchâteau: Why do you write? I think, again, there are several responses to that. My response would be, mainly for two reasons, but you're welcome to also share your insights.

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00:17:55.970 --> 00:18:12.610

Lucie Duchâteau: I would think, for the next slides, please, one key objective of the writing is to, of course, share information and inform. So, there's some criteria here which are, you know, consensual criterias for high-quality reporting.

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00:18:12.820 --> 00:18:18.440

Lucie Duchâteau: Which you can aim and try and follow whenever you draft your notes.

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00:18:18.440 --> 00:18:33.459

Lucie Duchâteau: In that objective, I would say, in the objective of informing, they can always be, as well, like, sub-objectives. You know, you can inform and analyze at the same time. You can inform and critically evaluate or draw a scenario, so...

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00:18:33.460 --> 00:18:42.089

Lucie Duchâteau: This is a broad objective, but this is one that you always need to kind of decide upon before even writing. Why am I writing for?

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00:18:42.170 --> 00:18:49.729

Lucie Duchâteau: And the next, slide, and the next objective that I can see is, of course, writing for action.

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00:18:49.930 --> 00:18:57.979

Lucie Duchâteau: So you will see the... the picture chosen here, of course, is a little bit cynical, and as a political advisor, you're not expected to

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00:18:57.980 --> 00:19:11.910

Lucie Duchâteau: manipulate your principle like a puppet. However, if you're expected to chart a course of action for your decision maker, it means that from that information and data you've gathered, you'll need to come up, you know, with

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00:19:11.910 --> 00:19:20.139

Lucie Duchâteau: conclusions, and from those conclusions, derive some recommendations. So, the recommendations are very important, because

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00:19:20.460 --> 00:19:29.829

Lucie Duchâteau: You need to think ahead of what kind of clear outcome they can have, what kind of impact, what kind of risks, depending on who do you recommend and what do you recommend.

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00:19:29.990 --> 00:19:43.000

Lucie Duchâteau: And for this one, there's this, you know, checklist that I'm sure you have seen before, which is called the SMART Checklist, the acronym that you can always use for your recommendation that I personally find useful.

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00:19:43.080 --> 00:19:56.070

Lucie Duchâteau: If you do, you know, specific, measurable, achievable, realistic, and time-bounded recommendations, I think it's a good way to already frame, your recommendations.

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00:19:56.820 --> 00:19:58.280

Lucie Duchâteau: Next slide, please.

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00:20:00.170 --> 00:20:18.149

Lucie Duchâteau: So, coming to the formats and the techniques, you can have different formats for your briefing notes, you know, depending mostly on the context, actually, and the purpose that it serves. If it's a flash report, it means usually it's a very short piece of, you know, information sent to or by HQ.

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00:20:18.150 --> 00:20:31.150

Lucie Duchâteau: There's often this, kind of a sense of urgency, in the flash reports, and it usually prioritized speed, you know, over clarity before longer analysis is being shared.

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00:20:31.160 --> 00:20:34.629

Lucie Duchâteau: You can have diplomatic cable, which I'm sure has...

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00:20:34.840 --> 00:20:42.259

Lucie Duchâteau: you know, civil servants and working in government, you know, very well. More in-depth kind of analytical report.

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00:20:42.260 --> 00:21:01.250

Lucie Duchâteau: Those ones are more detailed, usually. It can be policy analysis, you can review, you know, some key, security, political development in them, and then an email can even be a report. I mean, you can disagree, I would say, sometimes, depending on, you know, how urgent, how important the information is.

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00:21:01.250 --> 00:21:13.080

Lucie Duchâteau: an encrypted email sometimes to HQ can, you know, do an excellent job into both informing and mobilizing for action when it's needed.

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00:21:13.880 --> 00:21:25.159

Lucie Duchâteau: So, coming to, a few techniques, that I will spell out here that I find important. Of course, none of those lists are, you know, exhaustive,

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00:21:25.300 --> 00:21:37.670

Lucie Duchâteau: I think spelling and grammar, it's... I mean, it sounds very basic to say, but it's often underlooked, and I think, to me, that's what makes a difference between, like, a good note and an excellent note.

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00:21:37.990 --> 00:21:51.300

Lucie Duchâteau: you know, thinking about the abbreviations, the capital letters, the tiny, gritty details about the titles and the names of the person is very important. And in the poll earlier, I saw that

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00:21:51.350 --> 00:21:59.900

Lucie Duchâteau: The options to have, you know, more templates, were ranking pretty high as to what would help you for your report.

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00:22:00.310 --> 00:22:19.189

Lucie Duchâteau: In the UN, for example, we have a UN Protocol and liaison office that, you know, gives an entire overview of senior government representative for each country. So those sorts of templates are very helpful, to make sure that you don't, you know, misspell any names, for example. Clarity.

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00:22:19.810 --> 00:22:37.960

Lucie Duchâteau: Well, clarity, I think one point that we often forget as the drafter, is that in the end, because you've spent so much time researching your topic, which was also what ranked really high earlier in the polls, you end up knowing quite a lot, sometimes even more than the principal you were advising to.

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00:22:37.960 --> 00:22:57.400

Lucie Duchâteau: And so it's good to remember that, and not to just assume that because, you know, he or she is a principal, he or she will know more than you do. Sometimes you do more, and because of that, you need to always make sure that you stay very clear, you know, in abbreviations you might use, or technical wording you might use.

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00:22:57.440 --> 00:23:09.819

Lucie Duchâteau: It's good to really be mindful of your transitions, you know, having very clear, for example, titles in your sections, and kind of build your logical flow like this to make sure that

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00:23:10.140 --> 00:23:17.900

Lucie Duchâteau: You don't want to bury, you know, your key message, in the midst of your text and for your principal to try and have to dig it.

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00:23:17.970 --> 00:23:37.629

Lucie Duchâteau: it has to really be clear and out there. So that's one point I would insist on, really. Concerning the layout and the style, it will very much depend on your government organization. I can say, usually, in our domain, so to say, we try to remain rather neutral.

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00:23:37.930 --> 00:23:46.319

Lucie Duchâteau: it comes down to the confidentiality aspects that I was raising earlier. We remain rather objective, rather neutral in the words that we use.

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00:23:46.320 --> 00:23:58.579

Lucie Duchâteau: One example, for example, that I can give is that when we report on someone's feeling, for example, if we want to say, he was hopeful, or she appreciated, or he was in dismayed.

120

00:23:58.580 --> 00:24:18.370

Lucie Duchâteau: the way we would report, in my office is that we would always add expressing, so she expressed hope, or he expressed dismay, or she... because you can only report, you know, on what feelings was conveyed, but you don't know what actually the person felt. So, it's those little distinctions like this.

121

00:24:18.370 --> 00:24:22.480

Lucie Duchâteau: That can ensure that you stay, you know, neutral and objective in your report.

122

00:24:22.650 --> 00:24:30.530

Lucie Duchâteau: And then you don't take for granted, you know, emotions or feelings that were shared out there in the news that we don't really know about, or we cannot confirm.

123

00:24:32.020 --> 00:24:38.400

Lucie Duchâteau: Last thing I would say here is the planning, and actually that should probably have been the first thing and not the last.

124

00:24:38.520 --> 00:24:56.020

Lucie Duchâteau: You know, before you write, of course you should know what's your objective, what's going to be your key message, how much time do you have to write your report, what will be the structure, and the timing, and this is also why I put planning slash timing here, is very important, because...

125

00:24:56.540 --> 00:25:04.669

Lucie Duchâteau: again, in a crisis context, you know, if you don't want to prioritize Polish over speed,

126

00:25:04.670 --> 00:25:16.579

Lucie Duchâteau: you know, regardless how perfect your note is, if you're doing something on early warnings and the crisis has already erupted, unfortunately, it will not be of any use anymore.

127

00:25:17.120 --> 00:25:20.010

Lucie Duchâteau: So, next slide, please.

128

00:25:21.750 --> 00:25:25.080

Lucie Duchâteau: Yes, finally, a few words on structure.

129

00:25:25.510 --> 00:25:38.020

Lucie Duchâteau: Very quickly, all of this, again, is flexible. There's no, you know, strict kind of rules, but this is what you can see generally for the report and the briefing notes.

130

00:25:38.090 --> 00:25:56.350

Lucie Duchâteau: A title sometimes is very standard and kind of neutral, but if you do have room of maneuver in your government or in your organization, I believe it's nice to find something a little bit, catchy, you know? Actually, I was thinking of something that could be catchy for this.

131

00:25:56.350 --> 00:26:11.159

Lucie Duchâteau: briefing session, I was thinking, something like, less is more, you know, the art of the briefing notes. So little play-on words like this, they can really just catch your reader's, attention and want... make them want to read more.

132

00:26:11.570 --> 00:26:15.959

Lucie Duchâteau: The forwards are very optional, depends on how much, what's your length here.

133

00:26:16.040 --> 00:26:31.329

Lucie Duchâteau: One thing I would say is really key is your executive summary. I think it's the most important part, especially if you're briefing, you know, busy principals and decision makers. This is really where you will present the most important part of your report.

134

00:26:31.330 --> 00:26:39.600

Lucie Duchâteau: You know, question raised, main findings. If you have recommendations, they will be there as well, and the key conclusions.

135

00:26:39.600 --> 00:26:44.589

Lucie Duchâteau: An introduction, you know, sometimes in the introduction, this is where you will...

136

00:26:44.610 --> 00:26:49.649

Lucie Duchâteau: Add a few words tentatively on your methodology, and on your research.

137

00:26:49.790 --> 00:27:09.510

Lucie Duchâteau: And depending on how lengthy your report can be, you can have some sections, conclusion, and also annexes, if any. So I'll stop there, because I'm talking about being concise, so I hope I didn't take too much of my time, but thank you so much for your attention, and of course, I'm here if there's any question.

138

00:27:09.630 --> 00:27:10.510

Lucie Duchâteau: Thank you.

139

00:27:10.790 --> 00:27:34.349

Ula Rutkowska: Thank you so much, Lucy, that was fascinating. Claudia, I'll hand over to you in a second, but I just want to take a moment to encourage everyone to get their questions submitted again in time for the Q&A. We've got, we've got some experts here with us today, so please don't hold back, and just a reminder for me that there is no such thing as a bad question. So, with that, Claudia, over to you.

140

00:27:36.150 --> 00:27:39.000

Klavdija Černilogar Dwyer: Thank you, thank you very much, Ulla.

141

00:27:39.280 --> 00:27:45.510

Klavdija Černilogar Dwyer: And I see Joel has already whipped up the slides as well, so I think we can go to the next one already.

142

00:27:45.610 --> 00:28:00.960

Klavdija Černilogar Dwyer: I'm going to speak a little bit today about good briefing notes from the perspective of what Lucy was saying, but then I'm going to look also a little bit at the briefing notes that we normally organize for someone meeting somebody else.

143

00:28:01.190 --> 00:28:16.989

Klavdija Černilogar Dwyer: So, it's a different type of thing. But to start with, I can only say that I fully, fully agree with Lucy's presentation, and if I had such good briefings on my table as the ones she outlines, how they should be done, I would have a very, very easy life.

144

00:28:17.100 --> 00:28:33.240

Klavdija Černilogar Dwyer: So that would be... that would be the ideal world for me. So maybe I'm gonna just wrap up on this topic with a few elements that I have learned to pay attention to myself, both when I was still writing the briefings for my superiors.

145

00:28:33.240 --> 00:28:37.690

Klavdija Černilogar Dwyer: And also now, when I have to take decisions on the basis of what I receive.

146

00:28:38.310 --> 00:28:53.160

Klavdija Černilogar Dwyer: It's gonna be a bit of a summary of what Lucy, I think, has already said, but nevertheless. For me, the main things are really to make sure that we set out the problem, the challenge, the point to be decided very clearly at the outset.

147

00:28:53.290 --> 00:29:10.050

Klavdija Černilogar Dwyer: Because we want to catch the attention of the decision maker. We want to explain to them what it is we're talking about. So, I sometimes see briefings where the starting paragraphs are a little bit beating around the bush, let's say, trying to get to the point, but not quite getting there.

148

00:29:10.090 --> 00:29:23.349

Klavdija Černilogar Dwyer: Or sometimes they try to explain the whole history of a story, and that's not necessary at a time when we have to take decisions. All that can go in the background, but let's go straight to the point at the beginning.

149

00:29:23.900 --> 00:29:35.030

Klavdija Černilogar Dwyer: The second point is that decision makers very often want to have options on the table, so that at least there is an impression of them taking an actual decision, not just saying yes to a proposal.

150

00:29:35.260 --> 00:29:48.120

Klavdija Černilogar Dwyer: And there, what matters is that we prepare realistic options. Because we know that as the experts who are writing the briefings, we often know what the best option is, and we want to push for that one.

151

00:29:48.230 --> 00:30:04.999

Klavdija Černilogar Dwyer: But we might have a boss who's gonna say, yes, but what if I want to go in another direction? Would there be a way to do that? So, we have to be clear what it is that we can propose and offer them maybe not just one alternative, but a few of them.

152

00:30:05.570 --> 00:30:10.839

Klavdija Černilogar Dwyer: And then the third thing is to be quite specific on the risks and opportunities.

153

00:30:11.290 --> 00:30:19.039

Klavdija Černilogar Dwyer: Very often people ask, okay, if I go... if I decide yes on this topic, am I going to get myself into a trap?

154

00:30:19.180 --> 00:30:32.639

Klavdija Černilogar Dwyer: So, at the point of writing that briefing, I think the notes should also cover that question, so that the decision maker doesn't really find themselves in a difficult situation a few months down the road, when they've...

155

00:30:32.750 --> 00:30:35.580

Klavdija Černilogar Dwyer: Decided something, and it's led them to a problem.

156

00:30:36.070 --> 00:30:42.089

Klavdija Černilogar Dwyer: Setting out the next steps is also important in the sense of

157

00:30:42.250 --> 00:30:56.670

Klavdija Černilogar Dwyer: giving clarity of what needs to happen once a decision is taken based on a briefing note. Because maybe the decision maker will have to follow that up, they will have to do some extra steps, and it's good that they're aware in advance.

158

00:30:56.750 --> 00:31:02.419

Klavdija Černilogar Dwyer: So that they can organize their time, and also organize their thinking about the decision.

159

00:31:02.640 --> 00:31:10.019

Klavdija Černilogar Dwyer: And then finally, the devil is in the detail, I wrote there, because I mean that in two sentences.

160

00:31:10.170 --> 00:31:17.900

Klavdija Černilogar Dwyer: On the one hand, it's important that we are clear about things like risks and opportunities, like I said, but also costs.

161

00:31:18.240 --> 00:31:25.970

Klavdija Černilogar Dwyer: human resource implications of any decision that we are proposing, so we have to be clear on that. On the other hand.

162

00:31:26.140 --> 00:31:29.320

Klavdija Černilogar Dwyer: Too much detail can actually be your enemy.

163

00:31:29.490 --> 00:31:47.919

Klavdija Černilogar Dwyer: If you include too much information, you risk losing the attention of the person who is supposed to be reading this, and maybe even risking them making wrong decisions on that basis. And of course, you will ask, okay, how do I get the golden line between too much and too little? It's not very easy.

164

00:31:48.030 --> 00:31:54.679

Klavdija Černilogar Dwyer: But one thing I learned is that if you learn A little bit about

165

00:31:54.790 --> 00:31:59.020

Klavdija Černilogar Dwyer: How the decision maker thinks, and what they already know.

166

00:31:59.240 --> 00:32:17.680

Klavdija Černilogar Dwyer: You will also learn how to not underestimate nor overestimate them with your briefing notes. So, they usually have an assistant, these people. If you are not their assistant, go find this assistant and talk to them and try to get a little bit of intelligence out of them on what makes them tick and how to orient yourself.

167

00:32:18.030 --> 00:32:26.729

Klavdija Černilogar Dwyer: But this is a little bit in a nutshell, and I think that we can now maybe move on to the briefing notes for events.

168

00:32:27.730 --> 00:32:33.459

Klavdija Černilogar Dwyer: So, this is a context of where, like I said, your boss is going to meet someone.

169

00:32:33.740 --> 00:32:35.679

Klavdija Černilogar Dwyer: And they need a briefing note.

170

00:32:35.900 --> 00:32:53.289

Klavdija Černilogar Dwyer: And it's very likely that they will read this briefing note 10 minutes before the meeting starts, even if you have prepared it 2 days in advance. But the agendas of these people are very busy, so we want to make sure that we give them the very best, and only the best, and not too much, and not too little.

171

00:32:53.340 --> 00:32:57.050

Klavdija Černilogar Dwyer: So, how do we do that? Let's move on to the next slide.

172

00:32:57.300 --> 00:33:04.819

Klavdija Černilogar Dwyer: The first thing that's very, very important is to set the scene, and sometimes this is what takes the most research.

173

00:33:05.120 --> 00:33:10.380

Klavdija Černilogar Dwyer: We should, at the very beginning of such a briefing, explain who is meeting whom.

174

00:33:10.630 --> 00:33:20.339

Klavdija Černilogar Dwyer: Who is coming to either visit your boss, or who is your boss visiting? Do they know each other? Have they met before? How many people will be in the room?

175

00:33:20.680 --> 00:33:39.099

Klavdija Černilogar Dwyer: sometimes I receive a briefing where it says you're meeting XYZ, the president of something, and then 5 people rock up to the meeting. And then I'm confused, because I haven't had the information about the entourage and everybody else that's coming with them. So this research matters.

176

00:33:39.480 --> 00:33:43.850

Klavdija Černilogar Dwyer: Secondly, what's very important is to know who asked for the meeting.

177

00:33:44.350 --> 00:33:53.720

Klavdija Černilogar Dwyer: Was it us asking them, so we want to sell something to them, or is it them asking us, and we're gonna have to be ready to answer to some sort of request?

178

00:33:53.970 --> 00:33:57.859

Klavdija Černilogar Dwyer: And that also links to the third point of why is this meeting happening?

179

00:33:57.940 --> 00:34:15.589

Klavdija Černilogar Dwyer: There's a wide range of reasons why people meet, as you will well know from your work, I guess. It can be, it can be a courtesy meeting. A new ambassador is in town and wants to come and say hello, and they're gonna meet for 10 minutes, and that's it. So the briefing doesn't need to be very long.

180

00:34:15.710 --> 00:34:32.350

Klavdija Černilogar Dwyer: But it could also be a meeting where a big lobbyist is coming who's trying to convince you about something. Let's say they want funding, and you cannot give it to them. You have to be prepared, you have to have the defensives ready, and an understanding of

181

00:34:32.530 --> 00:34:36.200

Klavdija Černilogar Dwyer: What is the context of this get-together?

182

00:34:37.130 --> 00:34:44.999

Klavdija Černilogar Dwyer: And finally, also, are there sensitive issues to know about? This is very important to put up front in the note.

183

00:34:45.199 --> 00:34:58.999

Klavdija Černilogar Dwyer: Because there might be... there might be issues related to, I don't know, something leaking to the press that you don't want to leak to the press, so you want to brief your boss, not... not to say this in an official meeting, but they have to know about.

184

00:34:59.130 --> 00:35:10.250

Klavdija Černilogar Dwyer: Or, it might be that a stakeholder is coming with a big lobby action for the future, and they basically want you to be ready and fight that back.

185

00:35:10.540 --> 00:35:21.800

Klavdija Černilogar Dwyer: all this stuff needs to be at the beginning. I've seen it very often appear that the difficulties, the sensitivities were buried down in the bottom of the background.

186

00:35:22.000 --> 00:35:31.329

Klavdija Černilogar Dwyer: And I can tell you that not many people read to the end of the background, so we are putting ourselves up for a risk if we don't flag these things at the very beginning.

187

00:35:31.840 --> 00:35:37.910

Klavdija Černilogar Dwyer: Then moving on to the next element, and the next slide, is the talking points.

188

00:35:38.570 --> 00:35:43.660

Klavdija Černilogar Dwyer: So, getting these talking points right is also very important.

189

00:35:43.840 --> 00:35:47.710

Klavdija Černilogar Dwyer: Because, first of all, there cannot be too many.

190

00:35:47.880 --> 00:36:01.910

Klavdija Černilogar Dwyer: Regardless of the type of the meeting, if it's offensive or defensive or courtesy, there's no way that an interlocutor will be able to pass more than 2 or 3 key messages in a meeting, for sure.

191

00:36:01.910 --> 00:36:09.549

Klavdija Černilogar Dwyer: Imagine that, two people meet, and each of them has a list of 10 bullet points that they want to pass across.

192

00:36:09.550 --> 00:36:19.360

Klavdija Černilogar Dwyer: and the meeting is for 20 minutes, or half an hour. It's never gonna happen. Which means that they might choose the wrong points to discuss, and then the point of the meeting is a little bit lost.

193

00:36:19.500 --> 00:36:26.279

Klavdija Černilogar Dwyer: So, the best is really to distill what is it we really want to achieve in a meeting, and put that up front.

194

00:36:27.020 --> 00:36:41.389

Klavdija Černilogar Dwyer: And then, of course, support this with relevant arguments and facts, especially if it's a more adversarial meeting where you have to defend something, or you have to convince someone of a big change of policy.

195

00:36:41.410 --> 00:36:58.780

Klavdija Černilogar Dwyer: the speaker who needs this briefing needs those facts to be able to build the argument, especially if they're not an expert. And like Lucy correctly said before, it's very likely that they are less of an expert than you are in this. But they're the ones who are going to be doing all the speaking.

196

00:36:59.300 --> 00:37:06.879

Klavdija Černilogar Dwyer: And then, it's... it's a small thing, but very important, to try and keep all the main messages on one page.

197

00:37:07.250 --> 00:37:16.550

Klavdija Černilogar Dwyer: Because, I know that many of you are in a generation that doesn't print paper anymore. I also try to avoid that as much as possible, but some people still do.

198

00:37:16.810 --> 00:37:32.300

Klavdija Černilogar Dwyer: And I've been in countless meetings, where I saw that the speaker did not turn to the second page. They had the front page in front of them, whatever was on it, they would use, and then there was a big thing on page 2, they never turned around, and so it never got discussed.

199

00:37:32.550 --> 00:37:39.069

Klavdija Černilogar Dwyer: So, it's really... it's in our own interest to make sure things are quick and concise.

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00:37:40.110 --> 00:37:47.739

Klavdija Černilogar Dwyer: And then as well, defensives. Yeah, defensives is what we in the European Commission actually have to prepare quite a lot.

201

00:37:47.960 --> 00:38:02.160

Klavdija Černilogar Dwyer: especially for the more difficult meetings. It's a kind of Q&A type of thing. It's something where you research the potentially difficult questions that might be raised by the other party, and then try to put

202

00:38:02.790 --> 00:38:19.330

Klavdija Černilogar Dwyer: a kind of answer into two, three sentences. And these also have to be short. It doesn't make sense to prepare a defensive that is a one-page reply, because first of all, nobody will read it, second of all, nobody will understand it, and third of all, they can't say it.

203

00:38:19.360 --> 00:38:30.090

Klavdija Černilogar Dwyer: So again, brevity is really, really gold here. I can tell you that in my many, many years of writing briefings, I learned this sometimes the hard way.

204

00:38:30.160 --> 00:38:34.839

Klavdija Černilogar Dwyer: when I put a lot of information, thinking I'm gonna prepare my boss super well.

205

00:38:35.040 --> 00:38:40.309

Klavdija Černilogar Dwyer: And then they never turned to that second page, and all my work was a little bit in vain.

206

00:38:40.850 --> 00:38:50.880

Klavdija Černilogar Dwyer: Then moving on, once we've done the setting the scene, getting the talking points, the next element and the next slide is going to be about the background.

207

00:38:51.360 --> 00:38:55.509

Klavdija Černilogar Dwyer: So here, as well, my suggestion is to curate.

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00:38:55.660 --> 00:38:58.300

Klavdija Černilogar Dwyer: Don't throw all the background that is

209

00:38:58.440 --> 00:39:03.169

Klavdija Černilogar Dwyer: Possibly imaginable to be used into this briefing note.

210

00:39:03.460 --> 00:39:16.960

Klavdija Černilogar Dwyer: Keep it very, very much to the point, so we don't need to explain everything that's ever happened with the interlocutor or the topic, or everything we've ever done on a policy, really just the things that underpin the speaking points.

211

00:39:17.980 --> 00:39:23.520

Klavdija Černilogar Dwyer: Again, a bit repeating, to keep in mind the context of the meeting.

212

00:39:23.770 --> 00:39:32.039

Klavdija Černilogar Dwyer: Very often, people, when they have to do a lot of briefings, they resort to reusing old briefings, especially reusing old backgrounds.

213

00:39:32.170 --> 00:39:45.890

Klavdija Černilogar Dwyer: That's all very well and good, but it still serves a little bit to read that background before you submit it, because a tiny thing may have changed, some budget that was in there might have changed, deadlines may have changed.

214

00:39:45.890 --> 00:39:55.229

Klavdija Černilogar Dwyer: Dates, stuff like that. So, it's always worth spending those extra 5 minutes, even if you're recycling, to make sure that you get it right.

215

00:39:56.000 --> 00:40:06.410

Klavdija Černilogar Dwyer: And then, absolutely do not repeat what's in the speaking points. I see this super often, where, colleagues prepare a very good

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00:40:06.480 --> 00:40:19.230

Klavdija Černilogar Dwyer: scene setter, they explain what's happening, they put speaking points, and then the same thing is repeated, but with more volume in the background. It's really not necessary.

217

00:40:19.260 --> 00:40:36.319

Klavdija Černilogar Dwyer: The person who is using your briefing is going to know the first part, so the background is really just about underpinning it, giving it that little bit more juice and interesting stories, maybe, so that it helps the speaker finish their meeting.

218

00:40:36.640 --> 00:40:39.740

Klavdija Černilogar Dwyer: And the last thing on CVs, they're very useful.

219

00:40:39.760 --> 00:40:57.669

Klavdija Černilogar Dwyer: Especially if you can add a recent photo of the main interlocutor, so that if this is the first meeting, it's not gonna be embarrassing when, again, the main interlocutor rocks up with a big entourage, and then you say hello to the wrong person, because you think they're the boss, but they're just the trainee at the end.

220

00:40:57.690 --> 00:40:59.820

Klavdija Černilogar Dwyer: So a photo is nice.

221

00:40:59.910 --> 00:41:12.409

Klavdija Černilogar Dwyer: With the CVs, also, maybe what I advise is not to copy-paste whatever we find online, but to also curate it a little bit, you know, keep it short and to the point.

222

00:41:12.480 --> 00:41:30.199

Klavdija Černilogar Dwyer: I see very often, very, very personal, details that are added in a CV, and perhaps they're not necessary. But again, it also depends on the person who will be using your briefing. Maybe they want to make a connection and say, oh, yes, I also have two children, like you.

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00:41:30.200 --> 00:41:38.270

Klavdija Černilogar Dwyer: I don't know. It really depends. Personally, I'm not so keen on going into, my interlocutors is...

224

00:41:38.350 --> 00:41:41.009

Klavdija Černilogar Dwyer: Private life and making a connection like that.

225

00:41:42.020 --> 00:41:53.669

Klavdija Černilogar Dwyer: And then, just to finish it off, because I think I'm also running out of time slowly, there's a couple of quick wins that I think, you can benefit from.

226

00:41:53.840 --> 00:42:02.150

Klavdija Černilogar Dwyer: Knowing who you're writing for. So, a briefing note for a seasoned senior official who has seen it all.

227

00:42:02.390 --> 00:42:09.770

Klavdija Černilogar Dwyer: It's very different than a briefing note for somebody who has just arrived in the role and needs a little bit more context.

228

00:42:09.860 --> 00:42:23.460

Klavdija Černilogar Dwyer: So, it's very, very important to try to understand how they function, what they need, how they actually use the briefings, you know? Do they read them, print them out, they make notes, or do they just skim them and then speak freely?

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00:42:23.610 --> 00:42:27.370

Klavdija Černilogar Dwyer: Or some of them actually literally read out the speaking points.

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00:42:27.470 --> 00:42:33.789

Klavdija Černilogar Dwyer: This is the most difficult one. I've had an example of that in my previous life as well.

231

00:42:33.840 --> 00:42:51.759

Klavdija Černilogar Dwyer: Where the person was a very senior official, but they were very insecure, so they would read out literally everything you wrote to them on paper. And that made every meeting very awkward, because you can only control the speaking points of your boss, you cannot control the speaking points of the other person.

232

00:42:51.830 --> 00:42:57.319

Klavdija Černilogar Dwyer: So, that, was sometimes hilarious and sometimes really depressing, I can tell you.

233

00:42:57.630 --> 00:43:06.170

Klavdija Černilogar Dwyer: Then, another important element is to ensure there's follow-up, because every meeting, almost, will either

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00:43:06.340 --> 00:43:14.390

Klavdija Černilogar Dwyer: Come to an agreement, they'll take some decisions, or perhaps they're going to say, we need to follow up with this and this way.

235

00:43:15.030 --> 00:43:21.950

Klavdija Černilogar Dwyer: If you're not in that meeting yourself, please make sure to ask those who were, so that they tell you.

236

00:43:22.050 --> 00:43:38.579

Klavdija Černilogar Dwyer: Some organizations are more rigorous in writing minutes, so you'll have that in written, but very often, when political leaders go to meetings, these things tend to get forgotten. We have the same problem here in the Commission as well, so then we have to chase people to give us feedback.

237

00:43:38.580 --> 00:43:48.840

Klavdija Černilogar Dwyer: But they have to give us feedback. Otherwise, we will never be able to write the next briefing note for a follow-up meeting if we don't know what was decided. So this, I would say, just be persistent. Don't give up.

238

00:43:48.950 --> 00:43:54.370

Ula Rutkowska: Claudia, I'm just gonna chime in and give you a small nudge to start wrapping up slowly.

239

00:43:54.370 --> 00:43:55.880

Klavdija Černilogar Dwyer: I have literally one minute.

240

00:43:55.880 --> 00:43:56.900

Ula Rutkowska: Wonderful, wonderful.

241

00:43:56.900 --> 00:43:57.480

Klavdija Černilogar Dwyer: Yeah.

242

00:43:57.630 --> 00:44:09.489

Klavdija Černilogar Dwyer: So, the last thing is on style. I think it's a little bit similar to what Lucy was also already saying, that fonts and text sizes matter. Some people love templates, and then we have to just follow that template.

243

00:44:09.930 --> 00:44:26.350

Klavdija Černilogar Dwyer: Page numbers as well, for the same reason I mentioned before, some people will print out the briefing, and then if they drop it on the floor and there's no page numbers, it's a massive confusion. So, I know that people hate things like this, formatting and style, but it actually adds a lot of value.

244

00:44:26.470 --> 00:44:33.390

Klavdija Černilogar Dwyer: And finally, footnotes. Please don't put any footnotes in a briefing, because nobody will ever have the time to read them.

245

00:44:33.710 --> 00:44:40.909

Klavdija Černilogar Dwyer: So, on that note, that's it from me, and I think Lucy and I are ready for any questions.

246

00:44:41.530 --> 00:45:06.519

Ula Rutkowska: Alright, thank you so much for your presentation, Claudia, and to everyone attending here, please keep sharing any questions you have for today's speakers. We have quite a lot that have come through, both pre-submitted and in the Zoom Q&A, and to ensure your question gets seen and not lost in the chat, we want to ask you to submit it in the Q&A, which you should see at the bottom

247

00:45:06.520 --> 00:45:27.339

Ula Rutkowska: of your Zoom screen. So, just before we dive into all of these questions, I want to let you know that we've also created a great follow-on resource to today's topic that we think you will all find useful. This is a teaser lesson from one of our most popular courses, expanding on today's learning by covering how to sharpen your briefings proposal.

248

00:45:27.420 --> 00:45:44.459

Ula Rutkowska: To receive your link to this lesson, please go to the Writing Effectively in Government community and leave a comment on the post pinned at the top of the page. We'll send you a link in a few days after the event. My colleague has also posted a link to that thread in the chat.

249

00:45:44.460 --> 00:45:50.720

Ula Rutkowska: Alright, so now on to the Q&A, and we've had quite a lot come through.

250

00:45:50.720 --> 00:46:01.889

Ula Rutkowska: And I will just address you, Lucy, and Claudia, about telling you who, the question is for. So, the first question, this one is for Lucy, and it's from Jatin.

251

00:46:01.890 --> 00:46:10.520

Ula Rutkowska: If you can touch on this, how do you summarize complex system intricacies into simple, plain language?

252

00:46:13.090 --> 00:46:22.780

Lucie Duchâteau: That's a tough one. Thank you for the question. Yeah, I think that's the point on clarity, right?

253

00:46:23.240 --> 00:46:39.509

Lucie Duchâteau: And it's a tricky balance to find, because with complex issue, you necessarily want to go more into detail, and you cannot just reduce in a few bullet points without losing some nuances of the issue.

254

00:46:39.530 --> 00:46:57.510

Lucie Duchâteau: But something clear and something, succinct for the reader, also needs to be, balanced. So, I think the way, I have sometimes found a balance on this issue is to kind of have, like, a layered approach, so...

255

00:46:57.520 --> 00:47:12.290

Lucie Duchâteau: you would start with... and that's why I was insisting earlier on the executive summary. You can start, you know, with kind of, like, a high-level, one-page executive summary, that will really,

256

00:47:12.290 --> 00:47:32.280

Lucie Duchâteau: encompass and brings together the main kind of, like, points of the complex issue you're trying to breathe on, and then you give yourself more space and more length to go into detail into the core of your text. You can even attach, for example, annexes.

257

00:47:32.420 --> 00:47:50.529

Lucie Duchâteau: I think Annexes is a good tool to have if you have some kind of, you know, technical, complex issue, you can... you want to add some visuals, some graphs, some data.

The annexes can really be there to support, your argument without overloading and overcrowding, your core text.

258

00:47:52.440 --> 00:48:09.370

Ula Rutkowska: Alright, thank you so much for that, Lucy. Claudia, this next question is for you, from Emmanuel. How do you deal with steer from senior officers that ask for more detail throughout, which can lead to the briefing being way too long or unwieldy?

259

00:48:12.840 --> 00:48:22.629

Klavdija Černilogar Dwyer: I think in those cases, and I see where you're coming from, I've had that as well, in those cases, it's always better to have a meeting, to discuss

260

00:48:22.630 --> 00:48:34.819

Klavdija Černilogar Dwyer: than to go into endless re-editing and editing of a briefing. If these senior officials are happy to have a chat with you, things can be clarified in a meeting much more easily.

261

00:48:35.030 --> 00:48:41.190

Klavdija Černilogar Dwyer: If you have to keep adding details and details to the briefing.

262

00:48:41.260 --> 00:48:58.379

Klavdija Černilogar Dwyer: I think it's still important not to get... not to lose sight of the most important elements. Now, whether this is a policy briefing or a briefing for a meeting, to really put up front the things that really matter. And then, if you have to add a lot more in the background, perhaps it's better that way.

263

00:48:58.380 --> 00:49:09.179

Klavdija Černilogar Dwyer: But still, I would always advise, if there's a way to talk to them, or to talk to their cabinet's assistants, however the setup is, it can sometimes help and clarify a lot of things.

264

00:49:10.370 --> 00:49:35.340

Ula Rutkowska: Wonderful, thank you. And now I have a question that I'm going to pose to both of you. It's received quite a few upvotes, and I'm going to have you both answer it. But I'll start with you, Lucy. So, do you recommend using AI when writing briefing notes, and can you suggest a prompt that can be used to help format an outline for a briefing? So, that first question is, what are your... how do you... do you recommend using AI

265

00:49:35.340 --> 00:49:45.579

Ula Rutkowska: perhaps a bit of reflection on have you and how would you recommend using it? And then secondly, is there a prompt that you've found particularly effective or helpful?

266

00:49:45.580 --> 00:49:46.969

Ula Rutkowska: So, Lucy, over to you.

267

00:49:47.970 --> 00:49:58.739

Lucie Duchâteau: Yes, thank you. I am myself a bit of a boomer, so I came late in the use of AI, and I'm still... I'm still catching up.

268

00:49:58.750 --> 00:50:07.749

Lucie Duchâteau: I see the value, though. I think in summarization, definitely, it can really help you condense, like, lengthy report or data sets.

269

00:50:07.750 --> 00:50:31.269

Lucie Duchâteau: As well as to, customize your, your drafts, reports, so I find AI very useful for... to tailor, you know, your... your notes. So, for example, is it for a minister, address it for CV society actors, and, like, the kind of, like, the tone, shaping that it will give, I think, is useful.

270

00:50:31.840 --> 00:50:44.460

Lucie Duchâteau: And just overall for consistency, you know, just helping you with the formatting that Claudia and I alluded to earlier, I think to have more of, like, a standardized input.

271

00:50:44.580 --> 00:50:55.530

Lucie Duchâteau: However, I think there's still, challenges to bear in mind, you know, in terms of the accuracy. Very much often, you will really need to double-check

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00:50:55.530 --> 00:51:05.499

Lucie Duchâteau: You know, for any errors that is, produced there. There will still be a lot of gap. In my work, I find it tricky because most of my...

273

00:51:05.500 --> 00:51:21.699

Lucie Duchâteau: the report that I work on, or the talking points or briefing I give to the special invoice is actually not based on online, and public information. So, it is still quite limited. Of course, if you're working on raw material that is, confidential.

274

00:51:21.700 --> 00:51:29.719

Lucie Duchâteau: But I think, yeah, the way I see this, it's kind of, it's really good for a skeleton, you know, but then...

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00:51:29.810 --> 00:51:46.410

Lucie Duchâteau: you, as human being, will have to, do the work of refining, refining the message for sure. So I wouldn't be able to give you some sort of, like, a, you know, good-to-go, fits-in-every-situation prompt. I think it's very much depending on the context.

276

00:51:46.580 --> 00:51:47.479

Lucie Duchâteau: Thank you.

277

00:51:47.840 --> 00:51:50.189

Ula Rutkowska: Super helpful. Claudia, over to you.

278

00:51:50.480 --> 00:52:08.960

Klavdija Černilogar Dwyer: Yes, so I'm even more of a boomer with AI situations, but, we do use AI a little bit for briefings already in the European Commission, with a huge, huge caveat that we had to develop internal AI for this, because

279

00:52:09.130 --> 00:52:27.409

Klavdija Černilogar Dwyer: anything you feed into a public AI is going to be in the public sphere. So, if you're writing a confidential briefing with a lot of sensitive points, it's very important not to put that into ChatGPT and ask it to summarize it for you, because then that thing will not be confidential anymore.

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00:52:27.450 --> 00:52:34.260

Klavdija Černilogar Dwyer: So, we do use our own. It's mainly for summarizing right now, indeed.

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00:52:34.360 --> 00:52:46.699

Klavdija Černilogar Dwyer: Because AI still doesn't have that sensitivity of how to convey the message human to human. They will give you very good talking points, but they will be a little bit dead.

282

00:52:46.750 --> 00:53:06.589

Klavdija Černilogar Dwyer: So the task you have is then to infuse the emotion and infuse the human touch into the speaking points so that it's not two robots talking to each other, but two humans, because you're probably trying to solve a human problem. On prompts, I really, really am not an expert.

283

00:53:06.900 --> 00:53:15.390

Klavdija Černilogar Dwyer: The only thing I can tell you is that I have a colleague here who has spent 5 months perfecting a prompt for AI,

284

00:53:15.390 --> 00:53:29.269

Klavdija Černilogar Dwyer: to deliver the best outcome, and I think he's still on it, so I wouldn't dare to say that I know anything better than him, but that it takes a lot of time to put something together that will give you the optimal outcome.

285

00:53:30.920 --> 00:53:38.639

Ula Rutkowska: Wonderful, thank you, Claudia. And we've had so many questions come in on, on, on, you know, managing the need to.

286

00:53:38.640 --> 00:54:01.630

Ula Rutkowska: provide a comprehensive analysis, while still being concise and focused, and that's just coming up as a theme over and over and over again. So, Claudia, I'm gonna turn to you again and pose this question, which is, how can we balance the need for comprehensive background and analysis with the requirement to keep every briefing note focused, and concise?

287

00:54:04.010 --> 00:54:07.359

Klavdija Černilogar Dwyer: Yes, it's a million dollar question.

288

00:54:08.440 --> 00:54:11.720

Klavdija Černilogar Dwyer: If we had the perfect solution.

289

00:54:12.390 --> 00:54:15.430

Klavdija Černilogar Dwyer: I think it all rests on...

290

00:54:15.550 --> 00:54:18.669

Klavdija Černilogar Dwyer: You... first of all, you understanding the topic.

291

00:54:19.030 --> 00:54:24.629

Klavdija Černilogar Dwyer: If you understand the topic very well, you will be able to convey the main points.

292

00:54:24.790 --> 00:54:26.480

Klavdija Černilogar Dwyer: In a few paragraphs.

293

00:54:27.050 --> 00:54:41.120

Klavdija Černilogar Dwyer: That's the first thing. And to convey it also in very clear language, simple language. Sometimes policy language is an obstacle for us. We love to use all these complicated words and abbreviations, and I don't know what.

294

00:54:41.120 --> 00:54:53.530

Klavdija Černilogar Dwyer: But it doesn't help in the end, because in the end, you will probably agree that most of the messages on which decisions have to be taken are relatively simple, and they will boil down to a simple question.

295

00:54:53.560 --> 00:54:57.890

Klavdija Černilogar Dwyer: And that's perhaps where most of the time needs to be spent.

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00:54:58.160 --> 00:55:04.390

Klavdija Černilogar Dwyer: And then for the comprehensiveness, maybe, of the background and of all the history.

297

00:55:05.340 --> 00:55:14.889

Klavdija Černilogar Dwyer: I don't know, I... in my practice, people usually don't want to read more than a couple of pages, so it's... it again comes down to distilling

298

00:55:15.070 --> 00:55:24.970

Klavdija Černilogar Dwyer: to what matters in that very context. Because even if we take, I don't know, a topic like the Erasmus Plus program, it's an exchange program for students, right?

299

00:55:24.970 --> 00:55:36.350

Klavdija Černilogar Dwyer: You could write a novel about it, and it still wouldn't cover everything. But probably the main decision that needs to be taken, or the main speaking point that needs to be addressed in a meeting.

300

00:55:37.010 --> 00:55:53.490

Klavdija Černilogar Dwyer: concerns only one element of that big topic, so please focus on that topic. If people are asking you to be more comprehensive and put more details and go into drafting, I don't know, a political analysis paper, that's not a briefing, that's something else.

301

00:55:53.490 --> 00:56:06.270

Klavdija Černilogar Dwyer: And that's where I go back to, please try and talk to them, and explain to them what you're doing, and try to understand what it is they actually need. Because very rarely they will need 20 pages of background analysis.

302

00:56:07.160 --> 00:56:12.480

Ula Rutkowska: Alright, that's super helpful. Thank you, Claudia. And Lucy, I think we might have time for one more question for you.

303

00:56:12.610 --> 00:56:22.350

Ula Rutkowska: And this is from Anna. When you have to prepare a briefing note on a topic that you don't know, where do you search for your recommendations? Or essentially, you don't know anything, how do you even start?

304

00:56:24.710 --> 00:56:37.579

Lucie Duchâteau: Yeah, that's a good question, and actually, I realized in my presentation, I really... I didn't touch upon the research part so much, although it's so important, and it's one of the most time-consuming ones.

305

00:56:37.720 --> 00:56:56.399

Lucie Duchâteau: In my current role, and work, I would start with, you know, open sources, what's out there in the media? A lot also is being said simply on, social, you know, networks, Twitter, I mean, X,

306

00:56:56.400 --> 00:57:10.040

Lucie Duchâteau: checking on the posts of official, you know, statements, etc. You can already gather a lot from here. Then you can also, of course, see what's been done in the past within your, you know, from your peers, in your office.

307

00:57:10.040 --> 00:57:17.050

Lucie Duchâteau: Try to talk with colleagues, maybe some colleagues have more expertise than you, you can sit with them and try and seek information from them.

308

00:57:17.110 --> 00:57:24.179

Lucie Duchâteau: maybe some research has been done on that same topic before, so try and gather also what's available already, I would say, in-house.

309

00:57:24.220 --> 00:57:35.309

Lucie Duchâteau: And depending on the... depending on the work that you do and the topic that you research, of course, there's also sources that you can have, you know, outside your organization.

310

00:57:35.310 --> 00:57:47.620

Lucie Duchâteau: Outside your, outside your government that you can talk to. And, of course, you know, with all the caveats of the credibility of the sources and accuracy of the sources that you need to pay extra attention to.

311

00:57:47.620 --> 00:58:06.120

Lucie Duchâteau: But if you have some trusted, you know, trustworthy sources out there that can also help you do the work and gather that kind of raw information, I think it's also helpful. So there might be other ways, but I think on the top of my head now is how we'd go about this.

312

00:58:07.470 --> 00:58:24.099

Ula Rutkowska: Alright, so, thank you so much both. We've had some incredible wisdom and learnings from both of our speakers, and I'd like to ask everyone here today to join me in giving Lucy and Claudia a virtual round of applause. And, most importantly.

313

00:58:24.100 --> 00:58:29.969

Ula Rutkowska: Thank you to all of you, the attendees, for investing in your learning and being so engaged in this topic.

314

00:58:30.210 --> 00:58:39.469

Ula Rutkowska: The team is going to pull up a quick poll to find out how you felt about today, which will help us continue improving our content, and we really appreciate your responses.

315

00:58:39.470 --> 00:59:04.449

Ula Rutkowska: Before you go, and while you're still responding to that poll, I want to share a few more events that you can register to, join us at again soon. If you're not available to join live, remember that you can always register for the event in order to get sent the recording to catch up on whenever suits you. So, we've got Nerve Busting Tactics for Confident Presenting next Tuesday for top tips on stress management and sounding

316

00:59:04.450 --> 00:59:06.560

Ula Rutkowska: conflict when giving presentations.

317

00:59:06.560 --> 00:59:29.510

Ula Rutkowska: Delivery 101, taking place next Thursday for practical advice on how to ensure on-time and quality delivery, and later in February, we'll be exploring AI for research in our next edition of the AI Skills Lab. Okay, that is all that we have time for today. We hope you found it helpful, and we want to say a huge thank you to all of our speakers.

318

00:59:29.510 --> 00:59:39.349

Ula Rutkowska: to everyone who's made today happen, and to you, the attendees, for taking time out of your busy days. Please keep an eye out for the email coming your way with today's recording and resources.

319

00:59:39.350 --> 00:59:47.140

Ula Rutkowska: Don't forget to find my post in the community, and we hope to see you at another apolitical event very soon. Have a great day! Goodbye, everyone!