

Transcript | How to Write Better Briefings & Reports

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I see that we still have loads of people coming in, so let's give them... give them a moment to make their way through all the different Zoom logins. Um... Alright, here we go. Hello, and welcome to this panel on how to write better briefings and reports. My name is Ulla Rutkowska, and I'm a senior researcher here at Apolitical.

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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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Today, as the title suggests, we're going to be focusing on how to write stronger briefings and reports.

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These are the kinds of documents that underpin decisions, shape communications, and influence everything from internal strategies to public-facing statements. Whether you write every day, or only now and then.

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This session is about helping you do it with more confidence and impact.

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For those of you who may be joining us for the first time, welcome.

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Apolitical is the world's largest community for government, used by over a quarter of a million public servants and policymakers from more than 170 countries. Our mission?

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Is to make government smarter. And we do this by putting the best knowledge and skills at the fingertips of public servants around the world.

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So, I'm now going to see who is joining us today. Just as a reminder, please do introduce yourselves by posting in the chat where you are joining us from and what.

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Organization we work for. To be very frank with everyone, the introductions are going so quickly that I can barely keep up with them, but I see we've got Daniel from South London and the Greater London Authority. We've got Katrina from Essex, we've got, uh, we've got Ramona from Whitby, Ontario.

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We've got some folks from Toronto, quite a few people from London.

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From across the Scottish Government, Quebec. Birmingham, the Cabinet Office, Sutton Council, Cornwall... oh gosh, I can barely keep up with this. Alright, the Canadian Space Agency, amazing. How incredibly exciting. Um, Edmonton... Wow, okay.

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Well, I recommend everyone scroll through just to get a sense of how many people have actually joined us today. Before we get started, I want to introduce you to the Writing Effectively in Government community on Apolitical.

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It's a space to ask the questions we don't always get time for at work.

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Questions like, how do others manage tight deadlines? What's a good structure for a pro-perspective memo? How do I know when to stop editing?

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If you've ever wondered any of these things, you're not alone, and this community is a good place to connect with and learn from your peers in government.

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You can scan the QR code on screen now, or go to the community... to go to the community, or you'll find the link in the resources section, which can be found at the bottom of your Zoom screen.

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My colleague will also post it in the chat. I've got a few technical notes.

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I'll get a few technical notes out of the way before we get into today's conversation. This event is recorded for on-demand viewing on the Apolitical website, so please don't record it yourself.

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Closed captions are available and can be toggled on or off in your screen settings.

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Now, ahead of introducing our speakers, we are going to run a few quick polls to get a sense of where you're coming to.

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Today's conversation from. So, let's have a look at the first poll.

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The question is, what type of document do you write most frequently?

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Option 1, a briefing note. Option 2, a policy memo. Option 3, a report or an evaluation. Option 4, a media or stakeholder briefing. And finally, other. And if you've answered with other.

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Please do post in the chat. So, just as a reminder.

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Running a quick poll to get a sense of where you're all coming to today's conversation from. The question is, what type of document do you write most frequently?

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Frequently. So, let's see, I'm seeing a few responses coming in in the chat, so let's see what the answer is. Okay, 100% answered, great, so we've got most of you saying either a briefing note or a report or evaluation.

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Um, with those two clearly being the two winning documents, then I'm also seeing a few on emails. Yes, I think... I think if emails had been an option, we would have all answered emails realistically. Um... Wonderful. Okay, great. Thank you, everyone. So, now it's time to move on to the second poll.

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And that question is, which aspect of writing do you find most challenging?

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If you think of something that we haven't listed as an option, again, please do submit your response in the chat, but the options are distilling complex information clearly, structuring documents for influence, writing quickly under pressure.

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Tailoring content for diverse audiences, or again, something else, and please do share that in the chat. Right now, it seems like the biggest challenge is distilling complex information clearly, and I can very much identify with that. I've spent the last week thinking about summarizing quite a few reports, and it's been quite challenging. All right.

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We do have a winner. Distilling Complex Information Clearly, followed by Structuring Documents for Influence, or Writing Quickly Under Pressure.

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All right, everyone, thank you so much for participating in those polls. Oh, no, apologies, we actually have a third poll! Um, alright.

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Third poll. Have you received formal training and writing briefings or reports?

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So let's see when that comes up. Option 1, yes, recently, within the past year. Yes, but a long time ago.

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No self-taught or on-the-job learning, and no and keen to learn. So let's see. How many of you have received any formal training?

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And writing briefings or reports. All right, wonderful. It looks like the winning response here is no, self-taught or on-the-job learning. I'd love to learn a little bit more about what sorts of training you have received, so if you want to share a little bit more about the training, please do post it in the chat. Always helpful to learn what sorts of training programs are out there, especially in something like writing.

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All right. Thank you for taking part in those polls. Now it's time to introduce our speakers. We're fortunate to have two brilliant guests, Mira and Zoe, joining us today.

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Mira laundress Trapot is Director General of Transferable Skills within the Canadian School of Public Service, a role she has held since 2021.

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Her team's focus on developing learning opportunities for public servants relating to leadership.

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Policy and decision-making and business acumen. Zoe Collier has worked for over 30 years in and with the UK Civil Service and other international administrations.

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She began as a policy advisor before working in the UK Diplomatic Service, then as a senior lecturer, and now delivers international training in policy development, communication, and strategy for the Council.

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Of the EU. You can read the full bios by visiting the resources tab at the bottom of your Zoom screen and heading to the Speakers section.

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Before we launch into today's panel, I thought we could start with a quick icebreaker question, just to get us warmed up.

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So, Mira, Zoe. What's the hardest thing you've ever had to explain in a few sentences?

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How did you do it? I'll give you a moment to think, and everyone else who is joining us today. I pose the same question to you, and I'd love it if you could share your answers in the chat. So... Uh, Mira, I will come to you first. What's the hardest thing you've ever had to explain in a few sentences, and how did you do it?

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Well, I'm gonna do... because I'm opening, I'm kind of using a creative license to do something a little bit different. I'm not really going to answer.

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What's the hardest thing I have had to explain, per se, but I'm going to tell you.

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About how, on the first day of my first government job.

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I miserably failed. At explaining something very, very simple to my assistant deputy minister.

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And at the time, I didn't know what that was. Uh, and it's independent minister. The question was... Where'd you come from?

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Not hard, but... My very inexperienced and very, let's say, inspired self.

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Decided to answer that question with a very convoluted and metaphoric tale about the fact that, you know, we come from the past.

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That we take, and that matters more from where we come from, et cetera, et cetera. Instead of being kind of a 12-second.

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Answer. I wasted a great opportunity to make a good first impression.

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I also failed to take into consideration a lot of the points that I think we're going to talk about today.

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Which is kind of the importance of humility and simplicity. That was rather pompous of me, you know?

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The importance of knowing who you're talking to, as I said, I didn't know what an Assistant Deputy Minister is, which basically, for those who are not familiar with the Canadian system, is that the second-in-command in a big federal.

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Ministry or department. And the importance of situational awareness. I don't think I read the room really well.

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So that's why I answered.

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All right, well, thank you so much, Mira. Um, Zoe, now, I pose the same question to you. What's the hardest thing you've ever had to explain in a few sentences, and how did you do it?

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I love Mira's answer there, it's like, we've all done it, we've all done it. Um, I'm going to go slightly off-piste as well, so, um, we've got Richard from the Canadian Space Agency here, so here is a little anecdote.

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For you, from... I used to run a training program for the European Space Agency.

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On writing to persuade. And the reason they called it that was that.

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These were proper rocket scientists. Who communicated in proper rocket scientist language.

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But they were writing to... finance ministers of the member states of the agency to ask for money for projects.

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And they were writing in this incredibly technical way. Things that were far too long as well, and um... when I said to them, you really need to stop doing this, they're like.

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People think we don't know what we're doing unless we write like this, and my response to that was.

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Everyone knows you know what you're doing. You put things up into space, and generally speaking, they stay up there. They don't crash down to Earth.

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So we know you know what you're doing, but... The problem is you're writing for Ministers, finance ministers, who probably don't know a lot about finance, let alone what the space agency does.

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And they probably know as much about science as I do, and I know everything I know from Wallace and Gromit's grand day out.

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Apologies to anyone who doesn't get that, um, thing. But essentially, you know, you're writing for people who.

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Um, if they give you the money, they're going to have to go and explain that to the rest of their... governments to their parliaments, to taxpayers, to the media.

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And they can't do it unless that you can communicate with them.

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Really clearly about what value to human life back down here on Earth this project's going to give.

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And I remember one, um, young man in particular, just, he just... his face lit up like a light bulb, and he said.

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I've got it! And he went off and completely rewrote what he was writing, and I thought, excellent.

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Yep, I think some people have seen Wallace and Gromit's grand day out, so you'll get my, um, connection there.

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Well, thank you so much, Zoe. Um, those are some great answers to both of you, um, so thank you.

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That's more than enough for me now. So, without further ado, I'm actually going to hand over to Zoe for the next 15 minutes.

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So, over to you.

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Great, thanks, Eula. Um, yeah, I just wanted to start by just sharing some experience I had.

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Two... roughly two years, a little way into my career in the civil service, I... was a private secretary to a cabinet minister, which meant I had to commission.

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Briefings for him, and all sorts of other documents. I'd have to read them and just think.

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Can you read this? Will he understand it? Usually, we got things that were far too long, written in very technical language, or full of jargon.

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So part of my job was to... essentially summarize them into perhaps just a few bullet points.

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And, of course, you know, I wasn't a subject expert, so I might have chosen the wrong bullet points, and that's the risk that people run, that... If you produce things that are too long, somebody else will edit, so it's really important that you produce things that are.

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As good as you can probably get them. Thing was, you know, as a minister, his day was.

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From early in the morning until late at night. And his diary was devised up into 15-minute slots.

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So, potentially every 15 minutes, you know, he could have a meeting with officials.

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Then dash across to a TV studio to do an interview, then into Parliament to make statement.

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Take a call from his constituency office about something coming up at the weekend.

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Go to a cabinet meeting, and so on and so forth. So, literally, his days were spent jumping from one thing to another to another.

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So, when did he read his briefings? If it was for a meeting, and it wasn't too controversial a meeting.

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Something very straightforward, he would read the briefing. In the back of the car on the way to the event, or.

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Just before people came into his office. So part of my job was to make sure that, you know, if you read it like that.

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He would understand what this meeting was about, what he was being asked to do at it, and what that people wanted him to say.

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Um, other things he wouldn't read probably until late at night, after a full day of doing all these other things. So, you know, at midnight, sitting at his kitchen table.

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When, frankly, all he wants to do, probably, was go to bed and get some much-needed rest.

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So, always, my... One tip here, first tip here, is always assume that the person you're writing for is going to be.

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Reading what you're producing late at night when they are exhausted.

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And they are not experts, you know, particularly with politicians, you know, they are political appointments, they are not there because they are subject experts.

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That's what they rely on you for. So, um... have empathy for them. It's not an easy thing. What they don't want is something that is incredibly long.

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Badly structured. Full of language, they don't understand.

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Because that actually is just going to make them feel, what are these people hiding behind all of this stuff.

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So, really, really important that you make it short. Really clear, well-structured, and I'll say a little bit more about structure in a moment, because that was something some of you picked up on.

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So, always have empathy for the people you write for. You know, they have got a different job to do from yours.

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And they rely. Completely or almost completely on you for the advice that you give them.

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So, you want to make it, for your sake, as much as theirs, as easy for them to understand what you're asking them for.

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Really important. To plan, so... Um, I think it's very tempting, if you've got an urgent commission, you've got to produce a briefing, they want it by yesterday, it's really tempting to go straight to the keyboard.

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And just start writing. And the problem with that is that you will write, and I know this from experience, you will write a few paragraphs, and then you'll think.

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I've no idea where I'm taking this. And then it's really hard to unpick.

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So, however tight a deadline you have, just stop. Stand back from it, and just think.

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Why have I been asked to produce this? Who is it for?

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And what do I want to achieve from it? And if you're not sure about any of the answers to that, this is not like being at school sitting an exam.

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You do not have to sit all on your own, stressing about it. Go and talk to your boss, go and talk to colleagues. If, you know, if you're writing for somebody that you've never come across before.

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They will have a front office that can tell you a bit about them. There will be people around you who have written briefings for them, who can tell you a bit about.

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What kind of things this person particularly likes or doesn't like.

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So, that bit of planning, real... real clarity about your purpose, the why, you know, is this for... a meeting. Is this for them to take a decision?

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Is this for them to... do a media interview. So, you know, what are the... what is the reason that you have to produce it?

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And sometimes, I know when I worked in private office. It was frenetic. We were working, um, full pace all the time, and I'm sure sometimes I... will have just forgotten to say why I was asking somebody for a briefing.

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If that happens, you just don't be shy about it. Pick up the phone, talk to the person who's asked you to produce the briefing, and just.

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Find out a little bit more about it. Because what you don't want to produce is something that is completely... not at all what they need.

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Think about the audience. So, what do you know about them?

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How much do you think they know about this subject? I can tell you, if you're briefing government ministers, and you brief them on this subject a week ago, they would have pretty much forgotten all of it, because of all the other things that they've been doing in the meantime.

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Did they actually care about this? Is it a priority for them?

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I've worked for ministers who were deeply interested in my policy area.

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I have worked for ones who weren't remotely interested. And it's... in my early career, I think, I want to get this minister interested.

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So, I'm going to write lots of really passionate stuff, and loads of sexy details about this subject, because surely something is going to interest them.

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Actually, of course, the reverse is true. So, um... I discovered that the less they care, the less I write, and then we are all happy.

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Really importantly, though, don't think that you are briefing your minister.

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Or your chief executive, or whoever it is whose name you are putting on the top of the briefing.

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You are briefing through them. To the people they are going to be talking to.

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So, if you like, your minister is your primary. Audience. But it's the secondary audiences that you really need to be conscious of.

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So if you're briefing for a meeting. Who are the people coming to the meeting?

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Why are they coming? What's... what is their objective? What are they worried about, concerned about?

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What difficult questions are they going to ask your Minister? If you were briefing for... parliamentary questions or something of the like. You know, actually, it's those other members of the Parliament.

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Who are going to be hearing what the Minister says, and then they are going to go on and report it on to.

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Their constituents, or lobby groups, or whoever it is that, you know.

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They are in touch with who are interested in this subject.

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So, who in the Parliament is going to ask difficult questions there?

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If you're doing briefing for a media interview, obviously the journalist is a secondary audience, but then so are all the people who are listening into that radio interview, that television interview.

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Get a sense of who they are, you know, what is the... Um, the natural audience of that particular radio station, for example, to just get a... A sense of that, because it'll give you a good idea about what questions are going to come up in that interview.

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And then you can enable your... Minister, your chief exec, whoever it is, to give the right answers.

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And the third thing in planning, really think about what's in it for you. What's... what are your objectives?

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I think early in my career, I thought. You know, I'd get a request from the Minister's office that, you know, they wanted an urgent briefing, and I just think, oh.

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That is so annoying. Don't they know how busy I am?

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And go about it with a sense of resentment. But actually, if you think about it, what a great opportunity this is to get your subject and your thoughts about it in front of a decision maker, somebody who can.

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Make a difference. I, um... years ago, when I first started running courses at the Council of the EU.

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I get used to get quite a lot of pushback when I talked about this, um, and then... the then-president, who was a very experienced politician, he'd been a prime minister in his own country.

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He put out some really good advice to the Secretariat, and one thing that really stuck with me is he said.

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In my role as president, I have loads of meetings with really important people, heads of state and the like. I go on loads of visits all over the world.

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And I can only cope with that. Because of the briefings that you guys provide me with.

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But when you give me that briefing for that meeting or that visit, please tell me what you want me to come back with.

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Because in my position, I can help advance your policy, I can open doors, I can knock heads together, I can raise things at a level that you can't.

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So, that's always stuck with me, you know, treat this as an opportunity.

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Another really important thing I would say, when you're going about the process of briefing is.

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Loads of you have said you've had exactly the same experience that I did early in my career.

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Self-taught. I don't know why people think that somehow by a process of osmosis, we will be able to know how to do these things without some training.

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But, um, I used to write things that were far too long and full of fancy language, and... Um, structured like a university dissertation or a school essay.

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Completely not what's needed. So, unlearn what you've learned about writing from the moment we start at school, we are writing for people.

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Who know far more than we do about the subject. And our objective is to demonstrate that we've learned lots of things.

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So the more we write, the more marks we get, the better a grade.

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Here, you are writing for people who know far less than you do about the subject.

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Your job is not to turn them into a subject expert.

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It's to give them the tools to do their job. So, that means not writing... not demonstrating your... massively amazing vocabulary. Use nice, simple words.

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It means really thinking about structure. When we learn to write essays, we start out by saying, you know, a bit of background.

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You know, what experiments we've carried out. Then we say what we've discovered from that, what our findings were, and then we finish by saying, and therefore, the conclusion is.

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Blah blah blah. Very much like a Agatha Christie novel. When you're writing for really busy people, you need to write, like, an inverted Agatha Christie.

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There's a body in the library, the butler did it. If they want to know more, they can read on, but you're not forcing them to.

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So, always really think about, for this purpose, this audience, in order to achieve the outcome.

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That I need, what are the things I absolutely must tell them? You don't want to write War and Peace, and you certainly don't want to tell them everything you know about the subject.

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So, making those choices about what does this person need in this context, what are the things I absolutely must tell them.

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I'm sure most of you will come across the expression, the elevator pitch.

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Imagine...

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Zoe, I'm just going to chime in and let you know that you are at time, and I'm so sorry to be chiming in at what is truly a wonderful moment, but if you could start heading towards the end, that would be much appreciated.

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I will. Sorry, Mt. I thought I had two more minutes. Um, so I will... we'll wrap that up, but really think about, if you only had, you know, one minute to brief this person, what would you tell them? You would not start with background, you would get straight to the point, and that's what you really need to do.

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So, those are some tips there about people talking about how to distill.

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All the information you've got. Things around structure, so, you know, just touching on those things. And Ulla, I shall hand the floor back to you.

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Well, fantastic presentation. Thank you so much, Zoe. Mira, I'll hand over to you in just a second. I wanted to take a moment just to encourage everyone to get their questions submitted

in the Q&A. We've got two expert writers here, so please don't hold back, there's no such thing as a bad question, so again.

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Please use that sort of Q&A functionality at the bottom, send us your questions, and then we'll be able to spend some time chatting through them. All right, Mira.

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Thank you very much. Uh, it's kind of hard to go after Zoe, because I really like how you.

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Make your, uh, your content kind of, you know, illustrated by all these great metaphors. I will remember the Agatha Christie one. I especially loved it.

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Um, so... so some of what I'm gonna say is going to be, you know, not exactly repeating, but you're going to see emerging themes, and these are things that we can also discuss in the Q&As, but... but, um.

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One of the things that I want to start with is that.

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Often, briefing is seen as a proxy for some key executive qualities.

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And sometimes because of that. Um, people who are not really interested in executive positions are like, meh, so I don't really need to be a good briefer, like, as long as I know my stuff, I'm passionate, I'm intelligent.

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It's going to... it's gonna... it's gonna work. But... but actually, you know, briefing really does matter.

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Uh, even if you're not interested in executive positions. Mostly because if you are working in a policy field, or something related to a policy field, is because influencing decision-making actually matters to you.

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Um, you want to influence a course of action, a path forward, and you're briefing, whether it be verbal or on paper, is often the.

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Go, no-go point on a given decision. And that's how important it is. So it is usually geared towards.

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Decision makers, and it's, as I said, like, a good proxy for executive qualities, but it's a lot more than that.

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And it really is kind of at the core of what it means to be working in a policy, service, etc, those types of fields that most of you are kind of coming from. So what does it take to be a good.

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Briefer, right? Um, it takes many things, um, uh, but what I'm gonna... what I want to present to you today is a bit of a framework that, um, a very senior executive in the government of Canada uses. His name is Taikisarantis, he also happens to be the president of the Canada School of Public Service, and it's something.

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That he calls the Trinity of UTC. So the UTC Trinity of Briefing, basically.

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Utc stands for. You understand, T, translate, and see convince.

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And in that, and that's what I'm gonna talk about a little bit, and in that, you'll see a lot of what Zoe already alluded to, but also maybe some... some tips in terms of how you can consider yourself or become kind of a better briefer, either on paper or again, or again, um.

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Preferably. I mean... As policy folks, we all work on very complex issues in very complex.

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Systems. Somebody alluded to in the Q&A the fact that, you know, there are several layers, and everything gets kind of reviewed and rewritten, etc. So that's, like, the complexity does not... just come from the fact that the issues are complex, but also our systems and getting the information through.

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Is fairly complicated. So. It is of the outmost importance that we understand the what.

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That is being presented. But, and this is... this is also what Zoe talked about. Understanding is not mastering. It's not the same thing.

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The briefer is not presenting all of the technical details. Likely, you are not the accountant, or the engineer, or the lawyer that's kind of behind the measure.

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But what you need to do is really show that you have digested that information at the level of the decision maker, and that's really important, and that you can be.

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You can anticipate and you can respond to the questions. It is actually quite irresponsible to go through a briefing if you don't.

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Deeply understand the issue. So, the types of things that you have to kind of ask yourself when you're trying to prepare, right? Like, when you're starting to prepare on a briefing is, okay, you're not going to be... this is not going to be about the technical details, but you need to understand, you know.

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Is the what that you are presenting reasonable? Has the concept been tested? What does it look like elsewhere? What's our implementation capacity? What are the consequences of failure? Those types of questions that your decision maker or the.

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Person you're presenting the brief to, or through. Um, is going to.

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Want to understand. So this piece about understanding really is key.

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And this is where the fact that, you know, we don't get formal training for this... for briefing generally doesn't really matter. This is about.

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Having key, um, key analytical skills. Key, uh, like, a capacity to think things through.

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But then the second step is translating. Right? And this is where your brief kind of really comes into play. This is where you actually need to translate.

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What it is that you understood. Into the language and into the context.

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Of your decision maker. Because, again, like, back to my example about, you know, when I started on my first government job, I did not understand who I was talking to. I did not understand their context. This was, like, a simple meet and greet. We had 2 minutes.

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That's it. Like, I fail to understand that, and it makes a huge difference. Because at the end of the day.

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How you translate. The information that you're trying to present, or the way forward that you're trying to recommend.

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Is what is going to help you move beyond the facts.

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And really get into the potential advantages and pitfalls of what it is that you are... of the proposed way forward, basically.

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So that translation, really important. Also, highly dependent. On knowing your audience.

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And knowing your audience is... as Zoe said, you know, who are you going to talk to? Talk to people who know that person. Talk to people who understand the context, who have done it before, who... you don't know what you don't know, so ask.

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Talk to people. So, understand the issue, but understand the context, and that's kind of your intelligence gathering, in a way, right?

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If you're trying to understand. Who you're going to talk to. Think about their role.

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Think about their experience. Think about their expertise.

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And our communication preference. This is something when you start on a new job, for instance, always key to ask, like, these very questions to your boss on the first days.

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Because that's going to make a difference between whether or not you can translate what it is that you need to translate for them.

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And they get it. And that's a point that, um. Again, so we... you made, but this idea that.

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The briefing has to be geared towards the needs of the decision maker. It's not about you.

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Um, it's about the decision maker. So... We all want to look smart. We all want to look savvy, etc. This is not what this is about. And the way you're going to show that you're smart is.

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Whether or not you understood the context, and you were able to actually.

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Translate into, kind of, their context. Um, somebody in the Q&A need to say, mmm, speak their language. Yeah, and in some contexts, like the government of Canada, sometimes the EU, it also means you're going to need to brief in a language that's not your... that's not your language of work.

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French or English in our case, other languages in other contexts that some of you will... that will resonate with you. So think about that, right? Prepare.

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Think about that. The... the last... piece of the Trinity is the convincing.

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Piece. So... The people you're going to... you're trying to influence, or you're going to try to propose a way forward to.

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Are bombarded with information all the time. And so, how do you... make sure, and try to.

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Um, ensure that your information is not just adding to that general noise.

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That they are exposed to all day. And that's the convincing piece. That's the difference.

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Because a good brief, good information. Is just that. If you're not able to kind of go beyond.

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And be able to, kind of. Get that kind of click to, okay, where we are now at the go-no-go point. We are getting the decision that we need, or we... we are achieving the objective that we had set out for the, uh, for the.

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For... for the briefing. But we're talking to, you know, public servants, we're all public servants in this room.

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And this is... this is an important question for us. Because that speaks to the very fundamentals of what it means to operate in an environment where.

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Public servants are the advisors. They're not the decision makers. And so there's something about... A sense that we all need to develop as briefers.

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As to... Or, or related to... How far do you go?

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When do you stop? When do you yield? Or when do you say, I don't think they get it, I'm gonna try... I'm gonna... I'm gonna give this another round.

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So again, we are not the decision makers, but it is important that.

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We think about this idea. Of when... when are we willing to.

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Yield if our advice is not taken, which is... which is something that, like.

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Especially early on in our careers, sometimes we have. Issues kind of understanding, right?

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But... but I think there's an important, interesting question there, where.

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We ask ourselves, okay, do we yield when we have failed to convince? And sometimes we'll see it.

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Right? Like, sometimes either they'll read the briefing note in front of us, or it's going to be a verbal briefing, and you'll see.

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You've just, you know, it didn't... your point didn't get through. Either they're not coming to a decision, or they're taking... or they're making a choice that is not what you had recommended.

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Is that when you leave, you said, you know, I've given my best advice, I'm going to stop here.

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Or, do you actually think about. Have I given this.

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Document, or this person, if it's a verbal brief or whatever.

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Enough information on the consequence of the decision. For them to say, okay, here I can stop.

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So, I think that's an important consideration. So, as you are kind of progressing in the levels of your briefings, ask yourself, okay.

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In front of a decision that you may not be. That may not be what you were expecting.

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Do you yield now? Have you provided enough information about the consequences of not.

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Advancing that path forward. And if the answer to that is yes, I think then you kind... you can consider yielding.

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Or you think about your trust capital. What's your trust capital with that person?

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Is it big or small? And do you want to spend it on that?

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Or do you want to keep it for later? So I think these are all kind of interesting.

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Considerations when we get into the. Convincing... So, I don't have tons of time left. I think I'm probably more or less at time. Um, we can answer the question about trust capital, uh, later, Mark, if you want to, but...

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But, um, I've prepared a bit of a... of an infographic that our friends at Apolitical may want to share on the screen that kind of goes through a little bit of kind of the steps of, you know, UTC, what that is.

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Um, and then... Basically, you kind of have two phases of your briefing, right? Like, it's how you prepare.

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And how you deliver. And how you prepare, um, and these are kind of all things that I, like, both Zoe and I have alluded to, but.

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Is this... those questions need to be answered as you prepare for your brief, right? Who's being briefed?

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Why are we briefing? What's the objective? Um, and, and, and then kind of... Unpack your content, kind of around these elements of.

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The what, the so what, which is the consequences, and then now what, which are... which is the way forward, or your recommended option.

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But also take into consideration when you're briefing. Are you briefing at the back of a car?

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In a way to a meeting? Uh, is the person reading your briefing note, you know, at midnight after a 12-hour day?

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And where the briefing takes place. I think these are all really important.

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Kind of considerations when you're preparing. And in your delivery.

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Agility is really important, um, because there will be times when.

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You have misjudged of the situation. The person will know everything that you have to say, they're going to want to go straight to the point. How do you do that? You cannot be destabilized, you kind of need to adjust on the fly. So think about that. Think about the potential scenarios as you prep, and as you deliver.

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Remember to be agile. Oration is important. We've talked about jargon, we've talked about energy.

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Listen to yourself, not when you're briefing, but before. Practice, practice, practice. It sounds trivial, but I think it's really important.

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And the last one is observation. Read the room. You know, keep track of time, which I'm really bad at, but I think I'm going to be okay with this one. Um... Read the body language.

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When somebody's not paying attention, you're not doing... there's something that you're doing that is not right.

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So, you know, try and get as many clues as you can. And if you're... the briefing notes you've written.

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Came back to you with tons of revisions. There's something there. Like, why is somebody kind of rewriting your briefing note, right? What is it that you're not getting? You're... it's not because you're not smart, you're super smart.

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It's like, what is it that you're not getting? That makes it so that your note is not going through.

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So these are just some kind of key... No, something that's some... well, yeah, some key elements of things that you may want to consider when, uh, when you're briefing.

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All right, well, thank you so much for that brilliant presentation, Mira. Remember, everyone, to keep sharing any questions you have for today's speakers. We have lots coming in from you already, both pre-submitted and in the Zoom Q&A.

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To ensure that 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 of your Zoom screen. So we're going to head into the Q&A now, and we'll give you a minute or two to type your questions. While you're doing that, I want to remind you that we have a fantastic Writing Effectively in government community. Some of you may already be members, but for those who aren't.

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This online community is a space where public servants share resources, ask questions, and reflect on the craft of writing in government.

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Whether it's quick turnaround briefings or long-form policy reports. Again, the link is in the resources tab, but my colleague will also post it in the chat now.

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Okay, on to the Q&A. Alright, so, Mira, Zoe, what I'll do is I will sort of alternate which one of you I pose the questions to. I'll address you directly, um, just so you know. In some instances, I'll ask you both to answer. Um, so just, just, just a note on format there.

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I'm going to start with a question from Joanne, and I am actually going to ask both of you to speak on this one. And the question is, and I think this is probably the question that's on top of everyone's minds these days, but.

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What does the panel think about using AI to, uh, AI support to write better reports and briefings? And Zoe, I am going to come to you first.

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Yeah, great question, and, you know, this comes up, um. All the time. I think AI is going to be fantastic.

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I think it's going to be a game changer. I think, um... I work a lot with people for whom English isn't their first language, and I think, you know, AI can be incredibly helpful, you know, or writing just isn't their thing.

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But it's a tool, and it needs a human being, so you wouldn't go and buy a huge tractor.

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And jump into the cab, start it up, and then jump out of the cab and leave it to do its own thing.

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You can imagine the consequences. So, as with any tool, you know, you need to be really.

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In control of it. It's not perfect yet, but it makes lots of mistakes.

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Um, but also, the other thing I would just say, if you work in a political environment, just be careful about what you share with AI. So, most organizations I work with now have got.

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In-house, secure AI tools. Great, use them. But if you don't have that, don't... reveal loads of political insights to ChatGPT.

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It could be the end of your career, but I think, you know, I think it is... it's already good, I think it will get great.

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Um, I'm all for it, in this context, at least, um, but just make sure that you control it.

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Would be my... my overall thought.

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Mira, over to you.

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Yeah, the point about being prudent about what you share and what you feed the AI is of utmost importance, and this is, like, kind of at the core of our public service values, right? Like, maintaining the integrity of our system. So, this has to be kind of front of mind whenever using AI.

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But using AI is great, um... But it does point to something that, you know, sometimes.

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When we brief, we kind of play the AI role. We kind of Google stuff and just, like, put it in a briefing note and think that that's a briefing, and I think.

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Now... now it's very evident when AI... with AI, now it's very evident when, uh, briefers actually do that. So.

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So keep in mind a couple of things. A is what's your value add?

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And again, like, back to this idea of the translation and the convincing, the AI doesn't really do that for you. It doesn't have contextual awareness.

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And it cannot, uh, and it cannot influence the way forward in the same way that your brief can.

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And the other thing is responsibility. We've talked about responsibility with regards to what you feed.

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The AI, but also think about. The responsibility of briefing, per se.

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Your brief, basically. If your briefing fails.

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You're putting at risk the totality of all of their resources that went into... that led to, basically, that decision point.

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It is a big responsibility to brief. And you wouldn't want to give that to a robot.

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So, so think about, kind of, your role in terms of, like, your responsibility as the reefer.

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And keep that in mind, like, you are there to influence, and you need to take that, like.

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Take that responsibility seriously. And it's one for... it's one for the humans, in my views. Anyways, at this point of the maturity of AI.

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Well, thank you both. Incredibly helpful, and I'm hearing lots of, um... seeing lots of agreement in the chat. So.

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Next question, um, and this one's much more... less theoretical and much more practical, and it comes from Christine.

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Um, and Zoe, I am going to come to you for this one, but at the very beginning of a briefing, do you set out the main question?

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Or do you wait till the end for the most important parts?

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So... absolutely get straight to the point at the beginning.

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You have a very limited opportunity to catch this person's attention.

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They are tired, they're bored, they're whatever. Um, so what you absolutely want to do is get straight to the point, tell them what this is about, what you want them to do.

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And then that often is enough. Um, you know, I... Uh, I mentioned about my minister would quite often just read a briefing in the car on the way to something.

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Um, that would be the first time he'd look at it.

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As long as, and this was my job to make sure that's what he had, as long as it told him who he was seeing, why he was seeing them.

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And what the objective of the meeting was. That's all he needed. He, you know, he was a politician.

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These people are good at talking, they're good at people. He could just go in and have an effective meeting, but if it just gave him a whole load of information.

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Full of clutter, not actually telling him what the objective was here, why... why this meeting was happening.

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Um, then it would just be a conversation. Of no real use at all, so... If you want somebody to take a decision.

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You know, tell them what the issue is, what's the problem here that needs a solution?

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And get straight to what your recommendation is, so that they've got that right up front.

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And Miriam gave me some really useful things about, you know, convincing and persuading, and... Yeah, actually, I think it's far more effective to tell them up front what you're recommending than it is to leave it right to the end.

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Thank you, Zoe. Mira, there's that question from Mark that's sort of lingering over, uh, over this conversation, and I think it's good if we actually address it, but.

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What is Trust Capital?

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I mean, so there are tons of definition, and, you know, experts in psychology have... I've written books about this, how do you build trust capital, et cetera, et cetera. Basically, what this is, is.

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The... I'm gonna try to find alternative words, but I may repeat trust, but it's... it's basically... Based on the relationship that you have built with somebody, or a team, or a unit.

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The... the capacity, or the... the... Wow, it's harder to explain than I thought. It's... what you have accumulated with a certain person or entity that allows you to basically push the boundaries a little bit forward.

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So, and it can be based on many different types of things. You can... you can... you... maybe you have built trust based on, kind of, previous patterns of behaviors. They have seen you act or recommend some paths forward, and they led to great results.

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Being you've, you know, you scored a point in terms of trust.

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You have a shared history, or you have some personal affinities. These are also kind of things that may build some trust capital with somebody. So.

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Try and evaluate, A, like, how you build that, how much that is important in the role that you have.

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So, if you are very senior or very junior, kind of, this idea of building trust with, uh, your peers, colleagues, bosses, decision makers, etc, may be defined in a different way, but assess it first.

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And then try and see how can you build that. Trust, right? And, um, and then once that is established.

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It kind of... it's part of the context that is important to your... your brief. If there's very little trust, you may have to actually use that brief to build that trust.

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If there's a... if there's a lot of trust. Maybe then you can push it a little bit, and maybe try and convince a little bit more, go a little bit further. So that is kind of an important concept that is applicable to all of the areas of both your professional and your personal life, to be honest.

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Well, thank you, Mira. And Zoe, I have a related question for you, which, again, sort of builds on what you just talked about, but how do you build trust with the decision maker in a briefing? Are there any types of information structures? You've already talked about the sort of top three points that you think really need to be there at the top in order to.

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To prepare them for the meeting that they have going on. But are there any other things that you think one should pay attention to, from structure, language, and anything that just makes something come across as robust and trustworthy?

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Yeah, I think, particularly if you're working with political people, I think you need to have political awareness.

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That's, you know, as a civil servant. It's absolutely essential that you are politically impartial.

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With your briefing, but you do need to understand the political context within which a decision is going to be taken. So.

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Understanding what is politically desirable, acceptable, recognizing that you're not going to give political advice, but.

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You know, in my experience, the reason why sometimes I've recommended option A, and the Minister's decided on option B, is because option A would be more difficult politically for them, and, you know, as long as I have given them.

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The, uh, all the pros and cons of all the options, then that's fine. That's a political decision. As long as they're aware of the risks.

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Um, I think objectivity, when you're providing briefings, so you're not pushing something at them, so... Presenting options, being very even-handed about them, and based on.

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Evidence and good quality analysis, I think that's really important. Um, and... I think, yeah, just, um, I'm making... making your language.

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Fit with all of this, so that you're not... writing in a deeply technical way, or loads of jargon they're never going to understand.

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Because I had this experience yesterday, somebody sent me an email.

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And I thought, what are they hiding? Because I didn't understand very much of it at all, and I'm not a stupid person. Um, it was just so full of jargon.

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So, if you want to build trust, you know, one of the most simple things you can do is write in plain English.

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Well, thank you so much, Zoe. That's unbelievably helpful. Now, Mira, um... How important is it.

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That briefings to senior management contain multiple options for policy directions or outcomes, um, especially when, you know, maybe SMEs really have a preference for a particular policy position.

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Um, yeah, how important is laying that out? And also, maybe if you have any tips on how to approach laying that out.

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Yeah. Um... I've... okay, I have two... I have two answers to that question. One is theoretical, and one is practical.

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The theoretical one is I... I was strained in, you know, French universities, so everything goes by three. You know, you always have, kind of, you know.

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Three options and three alternatives, and we even call it in some of our briefing decks that some of my.

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My fellow, uh, Canadian public servants will kind of understand what I'm referring to, like the Goldilocks option, right? Like, so, you know, the cold, hot, and lukewarm options, like.

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This is... this is kind of the, I would say, kind of the more traditional approach, and it's fine, you know, a lot of people will expect that, and will react very positively to that, and.

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And usually, your recommended option is the one in the middle, right, which has shown that you've weighed all of the pros and cons.

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Now. The more... I don't know. Like, uh, uh, the other answer to this is.

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Kind of depends on who you're briefing and who you are in the system.

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And again, if there's a lot of trust, and if. You... your contextual awareness is really high.

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Your understanding of the issue is really high, it may be a tactic to say, like, I'm only going to propose one option.

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But be ready to have alternatives. This is where, kind of, your observation and your agility come into play.

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But you may want to... you may want to change your tactic and just say, I'm going to go with one recommended option.

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That's it. And then answer the questions and be ready to have something else. So I think... Again, it's kind of back to this idea of... being very aware of your environment, and also kind of your own strains, confidence, you know, mastery of the issue, et cetera, et cetera.

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But, um, but yeah, so these are kind of two different approaches, uh, that I think are there.

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All right, we have basically one minute left for the Q&A, so Zoe, I'm going to ask this last question to you.

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Um, and hopefully you can, you can end on a positive note, but how do you stay motivated when you feel like everything you write just ends up getting rewritten and edited a million different ways?

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By others along the chain of approval.

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Oh, yeah, so I think we've all had that. Um, and I think, um, I think having.

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Good quality conversations with the people who are quality assuring your work, who are checking it.

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About what you are, you know, first of all, have that conversation before you write it.

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So that you have common understanding about why you're writing it, and what's needed from it.

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Um, and then... If you've written it, just think.

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Have they changed it and made it better? Have they changed it just for the sake of it? I saw somebody put in chat earlier what worked with somebody who just changed things without even properly reading them.

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Um, you know. I always say, you know, this thing about the red pen.

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You get to a certain level of seniority, and you are entitled to use a red pen to mark other people's work, and so you use it.

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But, you know, is it because you've misunderstood or didn't know as much about the context, so more senior people will have more awareness than you might?

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So it's an opportunity to learn from it. But if somebody is just changing the language and turning it into something... yeah, I had a monumental fight with a director I had once, because he just changed.

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Um, he changed things for the sake of it. My name was still on it, and it didn't sound like my voice, and I had to... I went and said to him.

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That doesn't sound like me. Um, so, you know, and in the end, he did... he backed down and said, actually, it's perfectly well written. I was just... I just felt I needed to add some value.

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Well, go and find something else to do, was my response to that. But, you know, I think... Can you learn from it? Is it helpful, editing that somebody else has done? In which case, great.

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If it's not, maybe have that conversation. And just say, you know, I'm a grown-up now.

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I know how to write, you know. Please... can I just finish up one very amusing anecdote? When I worked in the Foreign Office.

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I had a colleague who drafted a letter, he was dealing with a piece of casework, and he drafted a letter for the Foreign Secretary to send to a Member of Parliament.

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About a constituency's, um, case. And he wrote in it an expression, I am happy to be able to tell you that blah blah blah.

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His boss changed happy to glad. Somebody else changed it to please.

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And then the Minister changed it back to happy, and we just laughed our heads off, because we thought, how much taxpayers' money went on that little.

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Expedition. Um, but I think that illustrates quite nicely why that stuff happens. So, don't worry about it, see if you can treat it as an opportunity.

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Alright, well, thank you so much, Zoe. We've had some incredible wisdom from each of our speakers, and I'd like to ask all of you to join me in giving Mira and Zoe a virtual round of applause.

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And most importantly, thank you to all of you, the attendees, for investing in learning and being so incredibly engaged in this topic.

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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.

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While you are responding, I want to reiterate that this isn't the end, but the beginning of a conversation. We'll keep sharing ideas and challenges and questions, and the writing effectively in government community.

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As a special thank you to everyone who attended today, we're giving you all access to an exclusive resource on how to adjust your writing for different types of briefings, adapted from apolitical's writing effective briefings in the Public Service course.

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To claim your link to the resource, 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 after the event. My colleague is sharing a link to the post in the chat now.

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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 our speakers.

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To everyone who's made today happen, and to you for taking time out of your busy days.

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Keep an eye out for the email coming your way with today's recording and resources, and we hope to see you at another apolitical event very soon.

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Have a great dayThank you