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Brief Like a Pro

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Nobody Talks About It.
Finally, A Guide That Can Help.

**TRACKING
& ANALYSIS**



The First Tool Designed for Report Builders and Legislative Trackers

One of the reasons we here at CQ find the “briefing culture” so interesting is because we hear about it so often from our clients.

We’ve developed serious respect for professional analysts and briefers, the folks who spend hours every day monitoring and gathering information on their issues and then bundle it to keep others informed.

And that is why we created CQ, the first briefings and reports tool designed with Washington in mind.

Simply put, CQ pulls in the information you track—whether its movement on a bill or news on an issue, committee or member—and then displays it however you like. Everything is updated automatically. You can add notes or other information. You can even generate automated reports and share information with colleagues.

The result is less information overload—and no cutting and pasting.

Designed after more than 200 interviews with our clients, CQ is a flexible information tool that allows you to create a workflow that meets your needs. It allows you to track all of your data in one place and create up-to-date briefings and reports that are ready whenever you need them.

**Want to know more?
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Introduction

It would be hard to overstate Washington's briefings culture. It's almost always part of the job, yet almost never talked about.

On the Hill, lobbyists brief staffers and staffers brief lawmakers. Off the Hill, staffers brief execs, execs brief the chief and the chief briefs the board. And, of course, everyone is briefing their constituents, always. The result is a constant stream of email alerts, newsletters, reports, posts—and that's not counting the meetings and conference calls.

Yet there's no universal protocol for these dispatches. There aren't many resources that address how to prepare them. Almost nobody teaches it. A few lucky souls learned from colleagues or inherited a procedure at work. But most simply figured it out for themselves, and now consider it part of the routine.

So in order to gain some insight, CQ conducted an online survey that asked some very basic questions about how briefings get done. It was nothing scientific, but more than 370 people participated and almost half left comments describing their work and their feelings about it. The answers they provided were revealing.

To start with, they spend a lot of time briefing other people.

Fully half of those who responded spend at least **1.5 hours a day**—almost a full work day each week—preparing briefings.

That's more than some people spend caring for their children.

And that doesn't necessarily include all the time they spend reading for work. Almost two thirds of those who responded spend two hours or more reading for work every day. That's at least 10 hours a week, or another full work day.

And you can see why. Large majorities said they have to brief both their boss and colleagues and constituents, often several times a week. The result can be an odd mix of large and small dispatches that take varying levels of effort. One respondent's list of duties provides a good example: "Weekly legislative updates (these are hard to create,

but so useful for my readers), a monthly membership bulletin (these are easy and fun), a quarterly newsletter (this is complex and difficult), and various other briefings throughout each month, including legislative action alerts (these are easy enough).”

Moreover—and this may be really unexpected—most said they kinda like the work.

Many said they care about the material, and that they enjoy staying current. More than half said their colleagues and constituents read either “a lot” or “almost everything” that they write. When asked directly how they feel about it, almost 43 percent said they don’t mind briefing work and nearly 28 percent said they actually like it. The word “fulfilling” came up more than once in comments.

As one respondent put it, “**I enjoy making information out of mounds of data—finding the nuggets we really need to know.**”

With sentiment like that, a paper on how to prepare better briefings seemed well in order, even if everyone’s information needs are different and there is no one-size-fits-all solution. So CQ dispatched a small team to call associations, agencies and offices all over town (and a few outside Washington) to find out some tricks of the trade. We checked in with the experts at the American Management Association. And, we asked respondents to weigh in with their ideas.

The result is a report that may provide some fresh ideas for veteran briefers and, for newbies, may keep you out of the 76 percent who had to learn briefing on their own. We hope you find it helpful.



If you could, would you cut down on the time you spend briefing?

**66%
Yes**

**34%
No**

Total Respondents: 332

Give Your Readers a KISS

Gertrude Stein once wrote, “Everybody gets so much information all day long that they lose their common sense.” When it comes to preparing a briefing, the goal is obviously not to drive the recipients to a state of numbness or near-lunacy. Rather, some say you should give them a KISS.

By “KISS,” of course, we mean the Clinton-era acronym for Keep It Simple, Stupid – and, indeed, many argue that there is little wisdom in producing briefings of operatic length or depth.

“The word ‘brief’ is in there,” observed Jordan Hassin, vice president at the Washington-based public relations agency Crosby-Volmer. “It is supposed to be quick and to the point. People casually throw around the word ‘briefing,’ but often that is not what you’re going to get.”

Hassin said simplicity is crucial. “You need to get straight to the point,” he said. “It’s ‘just the facts, please’ – the more simply you can explain it, the easier it is for everyone to understand it.”

Hassin’s point is seconded by Dustin Hobbs, communications director for the California Mortgage Bankers Association, who said his group’s membership have more pressing matters to address than political machinations.

“A mortgage banker spends 99 percent of their time working on mortgage banking, so one percent of their time is devoted to legislative issues,” he said in discussing how his office briefs the CMBA members. “You need to boil down the issue to know it affects your members.”

Molly Polen, director of communications at the American Association for Clinical Chemistry, always wants her organization’s briefs, blog post and press releases to tell the readers how scientific information relates to healthcare. And she wants the message to be in easy-to-understand language, not jargon.

“What we do is so simple,” she says. “It’s connecting all the pieces to say what the end result will be, how it will be meaningful. Everyone in the world can relate to themselves or their child as a patient. And you want to make that connection in the headline or the first paragraph.”

At Demand Progress, a left-leaning advocacy group, communications to supporters can be downright blunt. Consider the headline on a recent website post: “The government doesn’t need a warrant to read your email. We need to change that.”

Daniel Schuman, policy director at Demand Progress, says all communications should be “optimized” for their intended readers. The higher up the reader is—a legislator, for example—the shorter the communication should be. “There usually isn’t time to get deep in the weeds,” he said. “You’re writing for staff who are going to brief their boss or a member of Congress ... these people don’t have much time to read.”

Perhaps Kay Pauley, a senior policy analyst at Morrison Foerster, put it most succinctly: “It has got to be curated. That’s the whole point. You can’t waste the partners’ time. You have to give them exactly what they need and nothing they don’t.”

American Management Association

5 Tips to Avoid Information Overload

When it comes to sifting through information, a few simple strategies can make you dramatically more efficient. Here are some suggestions from our experts.

Create a priority matrix

Sometimes it’s hard to know what information you should focus on first. Having your priorities laid out and approved by your boss clarifies what information you need and in what order.

Create a data collection plan

This stems from the priority matrix, but you should do this with your team. Decide who will read what publications and have a brief meeting in the morning to share critical information, or use technology to share the most important material in a more timely manner.

Use technology to help you sort information

Take the time to learn techniques to manage chaos. A little bit of technology can go a long way. For example, you can organize your inbox so you spend less time searching for messages if you need to find something. Set up automatic email filtering so that non-critical information goes into folders. That way your email is not overloaded with “noise,” and you can easily find the information you need. If there is a type of communication that is always mission critical, have your email system automatically mark it as red so that you see it immediately.

Limit interruptions

If your job allows it, a great way to stay on task is to block off time where you make yourself completely unavailable. If your entire team agrees, you will all have uninterrupted time to really focus on gathering information. If not, close your door and use your calendar to mark you as busy for a set period of time. If someone is persistently interrupting your work, have a conversation with them, politely explaining that the interruptions are disruptive and offer to meet during lunch or after work. The constant interruptions will eventually disappear.

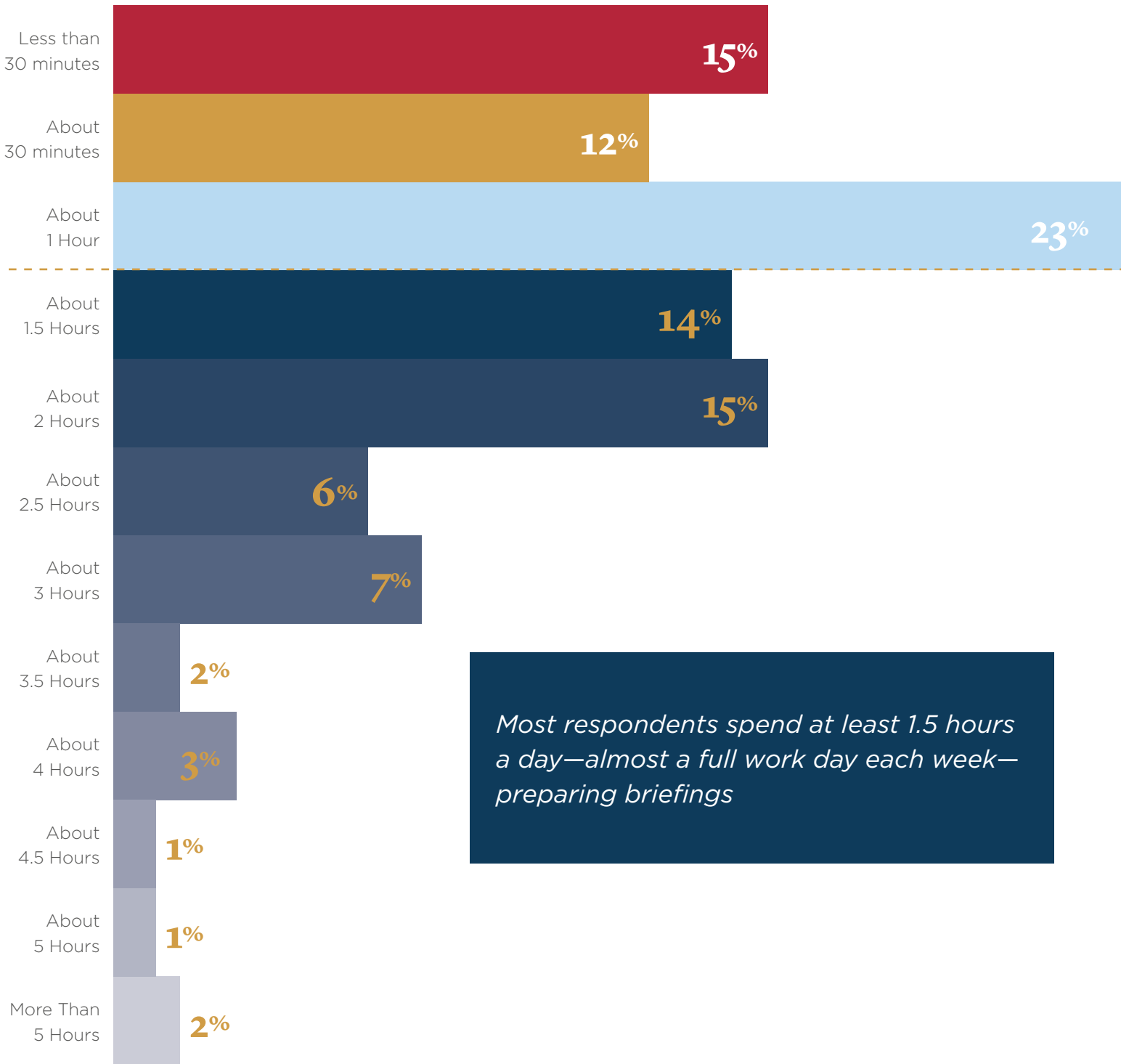
Manage the time you spend reading

Scheduling shorter periods of uninterrupted time works much better than trying to read and research for hours. Your mind starts to wander when you try to force it to focus on a task longer than 45 minutes. To alleviate this problem, and if your job allows it, you can limit checking your email and browsing to specific times of day.

For over 90 years, American Management Association International has been a world leader in training and professional development. AMA is an approved GSA contract holder.



Overall, how much time do you spend each day writing or preparing briefings, whether they are for your boss and your superiors or for colleagues, constituents, supporters, partners, your organization’s members or anyone else?



Most respondents spend at least 1.5 hours a day—almost a full work day each week—preparing briefings

Total Respondents: 333



How did you learn to put together a briefing?

I had to figure it out on my own **76%**

I follow an established procedure I inherited **21%**

Someone at work showed me **19%**

I took a class **6%**

Total Respondents: 323

Know When to Go Long

Of course, there is a counterpoint. "I think there is an interest in longer policy pieces," said Cynthia Bens, vice president of public policy at the Alliance for Aging Research.

One of the issues important to the Alliance is increasing immunization rates in older adults. When organizers realized there was no comprehensive overview on why there haven't been improvements in this area, they decided to create it themselves. The report, which features input from experts in the fields of gerontology and infectious diseases, will be released this spring.

The hope is that the more information the Alliance puts out about the topic, the more likely it is to advance policies and increase immunization rates. Previously, the Alliance believed "less is more" when it came to engaging readers. But now it appears more is more.

"People want more details on complex issues, which is great," Bens said.

At least one organization has found a way to marry the short versus long arguments in an approach that uses both.

"When we first started, we felt like every policy paper we wrote had to cover everything we knew about the topic. They were really long and really dense," said Karen Pearl, president and CEO of God's Love We Deliver, a New York organization that provides meals to people who are too sick to shop or cook.

"We have over time learned to quickly get to the point and to make the papers more digestible," she said. "Now they're much shorter."

The organization comes up with three to four key message points for each paper. They also include a strong visual, and a longer, more detailed report that includes citations and more extensive research on the topic.

"Walking someone through a policy briefing paper can be tedious, but when you say 'we're going to talk about X, Y and Z,' you're able to make sure your main points are clear and that you deliver them in a way that has the most impact," she said.

A strong visual, like an infographic, allows the audience to easily absorb the message, and a more extensive report allows them to dig deeper into the research that supports their case.



Where do you get your briefing materials?



Total Respondents: 307

How well do people read your briefings?



Total Respondents: 316

Briefings Can Be a Conversation

A briefing does not have to be a monologue, and encouraging questions, comments and an exchange of ideas can be successful.

Dustin Putman, who is in charge of communications and membership for the Washington Area Film Critics Association, cited the organization's private group page on Facebook as an effective platform for him to share information and field questions from his fellow movie reviewers.

"It offers more conversational, real-time interaction," he said. "Members can ask questions about an upcoming screening or details about a movie they might have missed. We can send out reminders about deadlines or dues, etc. Or, everyone can just vent about whatever."

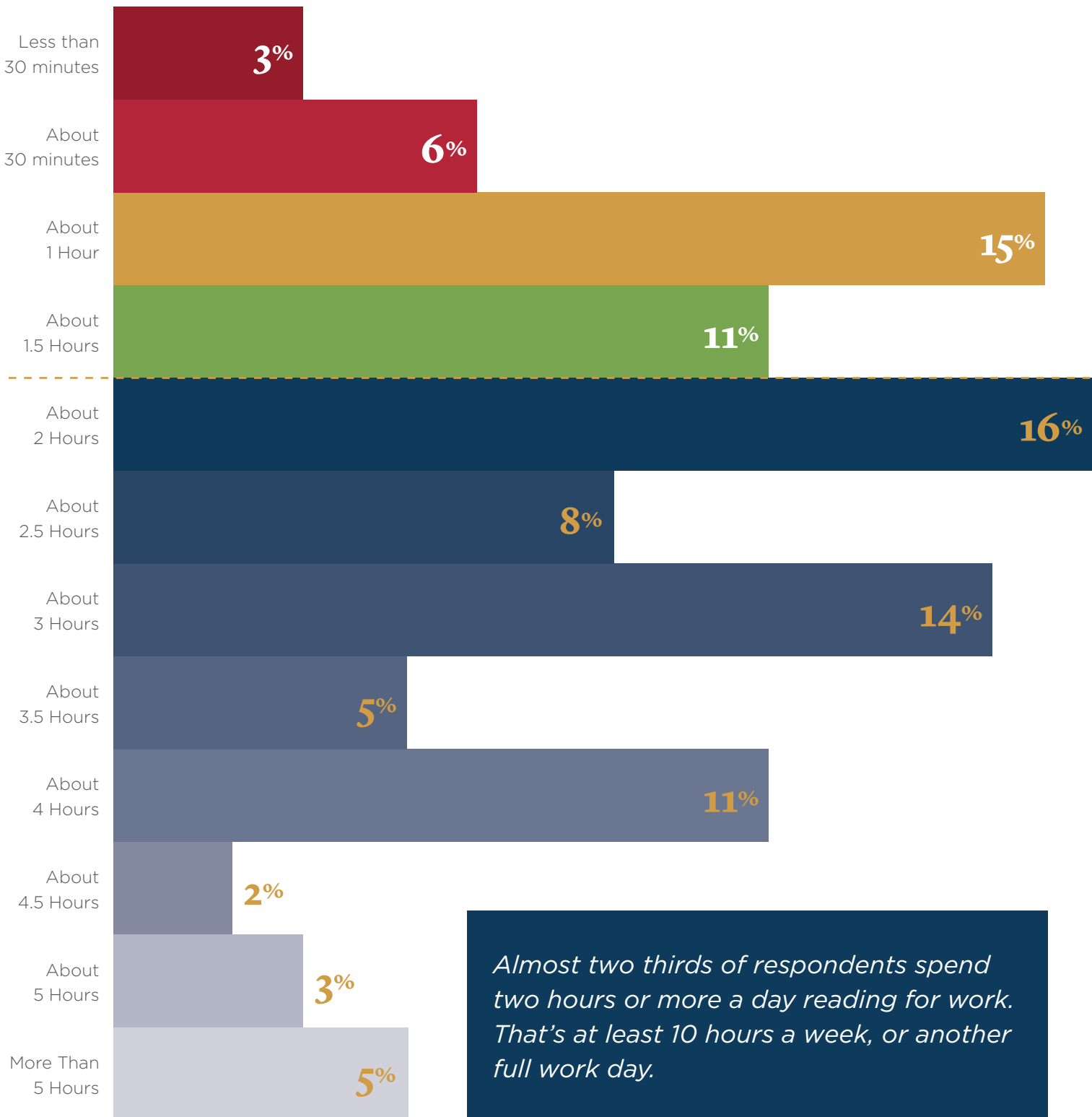
Kelly Harbitter, director of government affairs at Search, which helps states share information on the justice system, uses a blog to keep her colleagues briefed for that very same reason. "I like the blog, because people make comments," she said.

Of course, you can also ask readers directly what they think, both about the subject matter and the briefing itself. Tanya Chin Ross, the senior policy officer for advocacy at the Local Initiatives Support Corporation, an organization that connects local groups with public and private resources, takes that approach. Her organization surveys readers once a year about their email newsletter.

"They liked how short it was," she said. "They can read in on their phones, and know the policy without doing research. They liked fast facts that you can get at a glance."



How much time do you spend reading for work each day (news, newsletters, reports, studies, legislation, regulations—all of it)?



Total Respondents: 355

Almost two thirds of respondents spend two hours or more a day reading for work. That's at least 10 hours a week, or another full work day.



How do you feel about briefing duties

I don't mind briefing work

43%

I like briefing work

28%

I have mixed feelings

22%

I'd rather not do briefings

5%

I hate briefing work

2%

Total Respondents: 298

New and Different Approaches

In briefings, as in clothing, one size never fits all. Not everyone wants or needs the same information—nor does it always have to be communicated in the same way. For those working in a culture that supports it, it is possible to use new and different formats.

Jennifer Laszlo Mizrahi, president of the Washington-based nonprofit RespectAbilityUSA, maintains 25 different email lists that offer updates to a diverse range of Capitol Hill staffers, media outlets, associations and state agencies that she works with. While it might seem easier to just send out a single email to all, Mizrahi warned that not everyone shares the same passion for particular subjects.

"It is sometimes tempting to be all things for all people," she said. "But it makes no sense to bombard people with something that they are not interested in."

She also believes in keeping it personal. Mizrahi authors all of her email briefings, rather than delegate them to a lower-level staffer. In her view, this creates an intelligent connection to the recipient, rather than a bland statement of facts.

"I write to people and people write back," she said. "I try to make [it] more friendly. People who follow us are human beings and we try to be as human as possible."

Joseph Humire, executive director at the Center for a Secure Free Society, has found that their audience responds to a narrative, rather than just another email with a list of links. "You don't learn anything unless you click each link," he said. "That takes a lot of time."

Instead, his organization does things differently. For a report on Venezuela, for example, the first section gives some general background information, followed by the organization's position on certain issues and then links for people who want to learn more. That allows readers to know where the group stands just by scanning the email.

"I get a lot of feedback that people think the email is a report in itself," he said. "That's good because it looks like a new product, as opposed to just an email with a bunch of links that may or may not interest you."

There are also some who say that simply increasing verbal communications and informal emails can cut down on the need to do formal briefings. Segundo Mercado-Llorens, a Democratic lobbyist who runs his own practice, says clients rarely ask for written reports for that very reason.

"If I'm in the throes of an issue, you are getting calls and emails from me all the time," he said.



What do you use to create your briefings?

Word or Google Docs 37%

Email 20%

Powerpoint or simliar 18%

Excel or Google Sheets 15%

My organizations internal system 9%

Special app or software 6%

A wiki 1%

Total Respondents: 300

Is PowerPoint Your Friend?

Microsoft’s age-old briefings and presentations tool has its fans. Joe Bowerbank, president of Newport Beach, California-based Profundity Communications Inc., said he sometimes uses a PowerPoint slide deck to get ideas across quickly.

“As an example, before engaging with a new client, I’ll send them a creative brief to fill out,” he said. “Based on the responses, I’ll prepare about a 15-page deck that briefs them on their current situation, the competitive landscape, their goals, positioning and key message development, cost effective marketing mediums to utilize, critical success factors, next steps, etc.”

Yet while the medium is still ubiquitous in fields like science and research—the survey showed 28 percent use PowerPoint—there is some evidence that it is falling out of favor. Former Defense Secretary Ashton Carter banned the use of PowerPoint presentations in briefings “to challenge his generals’ thinking.” He is among the growing ranks of executives who have nixed the use of slides, says Professor Steven Keller, lecturer in the political communications program at George Washington University.

“PowerPoint is probably one of the worst things that has happened to presentations and briefings,” says Keller, who teaches the finer points of testifying before Congress. “PowerPoint winds up confining the thought process to interpreting a slide.

“In any hierarchy, as information goes up the ladder, it is combined with other information and things are compressed. ...We wind up at the top with the decision-maker getting 100th of the information that we started out with.

“When you put together a PowerPoint slide, you lose all sorts of nuance, you wind up losing all sorts of depth of information,” he said. “A man named Edward Tufte makes an argument that the Challenger explosion can be blamed on PowerPoint. ... As the information was compressed into slides and moved up the ladder at NASA, less and less attention was paid to risk management—and all kinds of warning information was dropped.

“The term ‘brief’ means the compression of information. We’re selecting information and leaving out some. We have to be careful that we still manage to capture some nuances.”

Susan Caba, Phil Hall, Glen Justice and Helen Anne Travis contributed to this report.

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