
Systematizing Organizational Analysis and Decision-Making with Briefing Notes

Version 1.0



Introduction

A strong, clear, outcome-driven strategic plan, with a matching operational plan, is fundamental to an organization's success. But even with strong plans in place, effective execution and navigation of emerging opportunities and risks require consistently excellent decision-making.

Excellent decision-making is systematic, driven by analysis that properly captures the relevant perspectives and considerations—and facilitated by clear communication. Of course, this is easier said than done! And there isn't just one 'right way' to do it. But a helpful tool in trying to foster excellent decision-making is the memo or "briefing note".

What is a Briefing Note?

A briefing note is a broad-based tool that offers a framework for conducting and communicating practical analyses in a format that is quick and easy to review.

Written as a document or slide deck, a briefing note typically includes some version of the following:

- Purpose: defining the "problem statement"—the issue, challenge, or opportunity
- Context: identifying the relevant background information
- Analysis: considering research, data, and perspectives
- Options: naming, describing and evaluating options for how to respond, act, or proceed
- Recommendation: providing a specific recommendation (and/or guiding questions)

The writer (you) and readers (your boss, superiors, peers, team, partners, etc.) then use the briefing note to guide strategic discussions, preparation, and decision-making.

This resource offers guidance on how to write high-quality briefing notes to support effective decision-making at your organization. The guidance is delivered through three steps:

1. How to scope the briefing note's parameters
2. How to structure and write your briefing note
3. How to appropriately use artificial intelligence (AI) to improve and speed up your work

Section 1: Scoping Your Parameters

To help you properly calibrate the note so that it's tailored to meet your needs, review each question below and document your responses in a separate file. This will be helpful if you choose to use AI to advance your work!

1) Why Are You Writing the Briefing Note?

Here are some potential reasons you're writing the note:

- *The note is being used to facilitate a decision.* If you're trying to guide a decision-making process, make sure you're capturing and framing all the relevant details and decision points. Establish the relevant context and analysis, identify options for how to pursue the issue, challenge, or opportunity, and then either make a recommendation or articulate key questions that must be considered to identify a path forward.
- *The note is just for information and preparation purposes.* If you're simply briefing and preparing your leadership—in a non-profit, government, or political context—note the key pieces of background information and whatever development, update, or news makes this relevant right now (as well as why it's specifically relevant to your organization) and any key messages or summary points to have available for easy reference.
- *The note is intended to garner feedback on a proposal.* Define the opportunity the proposal is responding to and what the proposal is—describing how it concretely advances the achievement of the organization's goals, compares to alternatives—and pose questions to cultivate discussion so that you get the feedback you need.

2) Who Are You Writing the Briefing Note For?

Consider the following as you're thinking about your audience:

- *Determine the required detail and altitude.* Understanding your reader's context (including their mandate, scope of responsibilities, seniority, level of influence, existing familiarity, etc.) will help you anticipate what details will be relevant to them, what considerations they will expect to see, and what you may need to take particular care to highlight. Understanding your reader's context (including their mandate, scope of responsibilities, seniority, level of influence, existing familiarity, etc.) will help you anticipate what details will be relevant to them, what considerations they will expect to see, and what you may need to take particular care to highlight.

- *Reflect on previous feedback.* Consider if you've previously received feedback from the reader that can be proactively applied in this briefing note, to allow for the best first impression and make it easy for them to focus on the substance. So much of the feedback we receive can be generalized to other writing products and contexts!
- *Be mindful of sensitivities!* Sometimes in setting the context, you'll want to identify organizational or partnership factors. It is critical to do so in a way that is mindful of potential sensitivities—related to “Big P” or “small p” politics, social and cultural dynamics, confidentiality and so forth. Even confidential documents get shared sometimes.

3) What Are the Known Parameters and Inputs for the Briefing Note?

At a minimum, try to define the following before you start writing:

- *Timeline.* Is there a clear deadline? Having a day versus a month to complete the note fundamentally changes the extent to which you can conduct research and analysis—and engage stakeholders.
- *Length.* Is there a requested page length? Being told to keep it to a page or two indicates a priority on brevity, likely to allow for rapid review. If you've been given the flexibility to make it several pages, the reader has greater appetite for engaging with analytical work.
- *Source material.* Are there academic publications, grey literature, media articles or other materials you have been told to review—or that you know you need to explore—to properly capture the context and complete the analysis of options?
- *Engagement.* Are there partners (internal or external) you have been told to engage—or that you know you need to contact—to properly capture the context and complete the analysis of options?

4) What Problem is the Briefing Note Helping You Solve?

To distill the issue, challenge or opportunity into a clear, concise problem statement that can drive the rest of the note, start by writing a rough draft in 50-75 words.

Now, scrutinize the draft you've written:

- Does it fully and accurately capture your understanding of the issue?
- Would someone without much context understand the problem as you've written it?

- Is there a more fundamental, underlying issue that should be your focus?
- If you successfully 'solved' the problem as currently stated, would everyone be satisfied?
- Would your boss agree that this is the right formulation of the issue?

Based on the above, try again! And again. Take your time and get the problem statement right.

Clearly and properly defining the problem statement is perhaps the single most important part of the exercise—and much easier said than done. If you get the problem right and the rest of the briefing note misses the mark, the reader will still be able to help identify options and solutions. But if you imprecisely define the problem statement, then everyone is set on the wrong path from the start.

Section 2: Structuring and Writing Your Briefing Note

You can treat this section as a briefing note template. Use the headers below to structure a blank document (or a document with your organization's letterhead, as appropriate) and paste your draft problem statement from your work in the previous section into the "Purpose" area. Then, use the parameters you've scoped and the guidance in this section to draft your briefing note. Again, this will be helpful input even if you use AI for the final product!

Purpose

This section defines the issue. Every briefing note requires a succinct, clearly written problem statement—an issue, challenge or opportunity—to frame the document and capture the reader's attention such that they immediately understand why it's important.

Context

This section identifies the background information required to understand the issue. For example, you may want to consider the following (among other things):

- Organization: Are there any features of your organizational context—strategic priorities, finances/funding, HR, values, capacity, etc.—that are relevant?
- Community: Does this issue impact—or is it impacted by—your local community?
- Sector: Are there trends, changes, or developments in your sector worth highlighting?
- Partnerships: Do any of your current or prospective partnerships need consideration?
- Politics: Are there any political factors or influences—nationally, regionally, locally—that affect this issue?
- Media: Has the issue caught the attention of media outlets (large or small)?
- Legislation and regulations: Are there laws (in force, pending, or prospective) or associated regulations that help characterize or set parameters for the issue?

You don't need to cover all these items, and your context section doesn't need to be long. It just needs to include whatever the key details are that are critical to the reader's understanding of the problem statement and subsequent analysis, options, and recommendations.

Analysis

This section presents evidence that allows the reader to assess the issue. The analysis builds on the context by ‘making connections’—describing the implications of some of the factors described—as well as by identifying existing research, evidence, experiences, and external analysis that should be highlighted to prepare the reader to properly consider the options described in the next section. You may wish to consider:

- Sectoral/industry data
- Academic research
- Grey literature (e.g., government strategies, commission reports, position papers, etc.)
- Environmental scans and jurisdictional comparisons
- Stakeholder perspectives and experiences

While you want the exercise of conducting the analysis to be robust, so that you’re not missing key information, the ‘art’ of conveying the analysis is in deciding what details to include in the briefing note itself. Not all the details of an analysis can make their way into the document, and you may wish to include an appendix (or appendices) with more detail. If the analysis is extensive, consider segmenting it based on some of the sub-categories listed above, or another breakdown of the analytical dimensions being considered.

Options

This section presents options—and considerations—for how to address the issue. Based on the issue, context, and analysis, scope out the best available options for what course of action to take, how to proceed or respond, etc. In doing so, include a brief review of what counts in favor or against each option in relation to each other, based on pros (strengths, opportunities) and cons (weaknesses, risks). And of course, “do nothing” may be identified as one of the options, if doing nothing truly is a workable option. To help the reader digest and evaluate the options, consider using a table like this:

Option	Description	Pros	Cons
Option #1			
Option #2			
Option #3			

The treatment of the options should be balanced. If a preference is obvious in the description of the options and their respective considerations, it undermines the spirit of the exercise and makes it harder for your readers to engage in a non-biased discussion.

Recommendation

This section shows the proposed path forward. In some cases, particularly where you are trying to help someone make a decision, it can be helpful to offer a specific recommendation and rationale, based on the relative strengths and weaknesses of the presented options. It's an opportunity to give your best advice based on the work you've done, and insight you've developed.

In other cases—for example, if you've been asked to help facilitate the discussion rather than propose a specific option—the recommendation can be to consider a defined set of questions (that you would prepare) to inform the next steps.

A Note About Editing!

A good briefing note requires a fair bit of work by the writer—to distill all the background analytical work into a tight, clear, short memo—and, not much work by the reader, other than thoughtful reading, reflection, and engagement. But ensuring a note is tight, clear, and short isn't important merely from a quality perspective; it makes it easier to consume and minimizes distractions, helping the reader focus on the issue. To help achieve this, consider the following:

- Review the document several times (and read it out loud), revising it as much as you need to get it as clear and succinct as possible, reducing fluff and over-explanation.
- Keep it brief, sticking to what's essential based on the document's scope, making sure every sentence is doing a specific job.
- Ask yourself: if you removed a detail, would your reader's understanding, assessment, attitude, or position change? If "yes", include that detail. If "no", omit it.
- Make sure the note is consistently formatted and tidy. Just like errors, poor writing, and over-explanation, visual messiness and variation can be unconsciously distracting and keep the reader from engaging with what you want them focused on.

Section 3: Using AI Effectively

It has quickly become quite common to draft content using AI tools—“large language models” (LLMs) like ChatGPT, Copilot, Gemini, Claude, etc. And while LLMs can be immensely helpful in preparing a briefing note, you’ll maximize their usefulness if you avoid the temptation to simply offload your work.

LLMs produce well-written content, but unless you put the thought and time into ensuring the prompt is sufficiently detailed to capture your needs, all you’ll get is professional-sounding slop that will miss the mark. There are two broad ways in which, from my experience, LLMs can be especially helpful:

1) As a Sounding Board and Analytical Partner

While well-constructed prompts are needed for producing specific outputs, sometimes you’re just trying to figure out what you need to figure out. And so loosely constructed questions and instant responses are a way to help get you there. If you’re trying to better understand the issue you’re tackling, test and hone your problem statement, think through contextual considerations, or even just learn how to improve the format of your document, LLMs can provide instant, helpful feedback and advice. You can start with a vague inquiry and, through going back and forth, make considerable, rapid progress.

In this process, you’ll also find LLMs offer a very quick path to finding key research articles, white papers, grey literature, media articles—providing the links or path to locating the source material, as well as summarizing it.

2) As a Review and Polishing Tool

If you’ve worked through the first two sections of this document, you’ve now got clearly defined parameters and at least a rough draft of your briefing note. If you want to complete the work yourself—go for it! Like all earlier generations, you don’t need AI. But, if you’re short on time or simply not inclined to go through painstaking revisions to make your briefing note “just so”, an LLM can help push you over the finish line.

Use the parameters you’ve scoped (in section 1) to write a prompt, explaining the exercise, and then upload the draft you’ve written (in section 2), and ask the LLM to do one of the following:

- Review the document for copy edits (to correct typos, punctuation issues, grammar, etc.) and/or substantive feedback; you can apply the feedback as you see fit.
- Produce a clean, polished version (based in the draft and within the scoped parameters); you can then either continue to tweak it or just run with it.

A Note About AI Limitations!

Even within the context of these suggested uses of LLMs, it's important to note the limitations:

1. We've all heard about LLMs making mistakes, fabricating query results, getting confused and "hallucinating". Never assume it's all accurate; always review the work, the sources, the links, etc. And ignore the gratuitous flattery you'll receive by default (ask it to be objective!).
2. Remember that what you get out of the LLM will only be as good as the prompt you feed it. It's not magical and won't just know and understand your context unless you provide it.
3. The briefing note is a tool for organizational analysis and decision-making, but you're the messenger; you're responsible for leading others through the note and facilitating the discussion. If you rely on the LLM to produce your work and you aren't sufficiently familiar with the product, it will show, be awkward, and stifle the conversation.

Connecting

If you or your team are interested in receiving guidance on using this resource or are looking for support with your organizational analysis—related to policy, strategy, planning, business development, or anything else—please reach out! I’m eager to speak.

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