

# FORMATS FOR BRIEFING NOTES AND BRIEFING BOOKS

|                           |  |    |
|---------------------------|--|----|
| Introduction:             | Make Your Organization Structure Visible . . . . .   | 2  |
| One-Level Format:         | Paragraphs Alone . . . . .                           | 4  |
| Two-Level Format:         | Title & Paragraphs . . . . .                         | 6  |
| Three-Level Format:       | Title, Headings & Paragraphs . . . . .               | 8  |
| Three-Level Format:       | Briefing Note . . . . .                              | 10 |
| Four-Level Format:        | Title, Headings, Sub-Headings & Paragraphs . . . . . | 11 |
| Five-Level Format:        | Briefing Note With Summary . . . . .                 | 13 |
| Five, Six or Nine Levels? | Covering Memo Plus Several Briefing Notes . . . . .  | 15 |
| Seven-Level Format:       | Briefing Note With Title Page & Table of Contents    | 22 |
| Fourteen-Level Format:    | Several Briefing Notes in a Binder . . . . .         | 30 |
| Twenty-Three Levels:      | Several Binders . . . . .                            | 32 |

# INTRODUCTION

Make the Organization Structure Visible

*When you deliver your message to readers . . .*

*Will it look like this?*



*Or this?*



Note: This section provides guidelines on briefing notes and briefing books on issues. A different approach is needed in preparing briefing books for meetings, events and trips. This button will take you to the templates page for them, where you will find relevant guidelines:

Note that a briefing book on issues can serve as a supplement to a briefing book for a meeting, event or trip.

In most departments, memos to a minister have rigidly defined formats. They may be limited to no more than two pages, or perhaps less. Often, though, you can supplement the memo with briefing notes or briefing books that are not limited in length. That added length gives you much more latitude in formatting.

The greater the latitude you have, the greater is your obligation to use it wisely. You can't force your audience to read your message. You can, however, induce your audience to read it by making it user-friendly. And formatting is a vital tool to help you achieve that goal.

Some people find formatting easy. If that's you, you might not need to give this section more than a passing glance.

Other people find formatting difficult. If that's you, be prepared to take some time to go through this section slowly. Formatting a major briefing package may seem impossibly complex at first. However, formatting is a matter of progressively building on a handful of very simple concepts. This section will take you through that process step by step.

The effectiveness of your format depends heavily on the organization of your message. You can't format a message before you've organized it. If you haven't done that yet, go back and do it. Only then can you start to work on making the organization structure visible to readers, which is a key objective in formatting.

If the organization is sound, you will find that it is relatively painless to format it. If the organization is flawed, you will run into problem after problem as you try to format it. If you run into serious formatting problems, this may be a signal that you need to go back and revise the organization structure.

We saw earlier that effective organization requires:

- grouping information into categories at each level of detail;
- ensuring that the items in each group do not exceed a viable horizontal comprehension span — about seven or eight items for most reports and briefing notes; and
- sequencing material in a fashion that best suits your objective and your audience's needs.

In your format, your use of these principles should become readily visible to readers. This section will explain how to do that in preparing briefing notes and briefing books on issues.