Guidelines For
Briefing Books to Be Used for
Meetings, Events and Trips

Introduction

The templates will save you a great deal of time and will enable you to develop excellent briefing books – provided you use them wisely. These guidelines will help you to do just that.

The table of contents can be a good place to start in working with the templates for any of the briefing books presented. This will give you a quick overview of how the templates are organized, which ones will be useful for the event at hand, which ones will not be needed, and how you might need to reorganize the templates for your present need.

You will see a button labelled Complete Books in the navigation area for Briefing Books for Meetings, Events and Trips. It leads you to templates for two complete briefing books:

- Briefing Book for a Complex Engagement (involving three events at one location); and
- Briefing Book for a Simple Engagement (involving one event at one location).

You might find it useful to print both of those books, add dividers and place them in binders. This will give you concrete points of reference to help you to decide how to design books for specific needs – adding, subtracting and rearranging sections as needed.

In the complete samples, the tables of contents have links that will take you to each tab of the briefing books. The balance of the sample provides the contents of each tab. Each section has links to templates for it both MS Word or WordPerfect, depending on your preference.

Principles of Design

Adaptation to the Engagement at Hand

No two engagements are entirely alike, so no two briefing books will be entirely alike. The key to using the templates successfully is to be flexible, creative and systematic in adding to, subtracting from and rearranging the sections provided in the sample books – always keeping the user's needs at the top of your priorities.

In addition, be prepared to quickly adjust the structure of the briefing book as the structure of an engagement evolves — sometimes at the last minute. Take, for example, the Table of Contents for the Complex Engagement in the templates. You will see that the material for media relations is placed in the section for a signing ceremony. However, at the last minute it might be decided that the media will accompany the minister on his tour of facilities. In this case, the media relations material would be moved into a separate section of its own so that it does not appear to be tied to the signing ceremony alone.

Common Look and Feel

The templates apply a common look and feel to every tab.

At each tab, the first thing the user will see is a familiar format with similar information provided in similar places. This enables the user to know immediately where he or she is in the briefing book, what is found in that tab and why it is relevant.

The first page of every briefing note within the book contains cascading headings – from the general down to the specific – to tell the user exactly where he or she is in the briefing book. These headings correspond to the headings in the table of contents of the book. Here is an illustration of the relationship between the cascading headings and the table of contents:
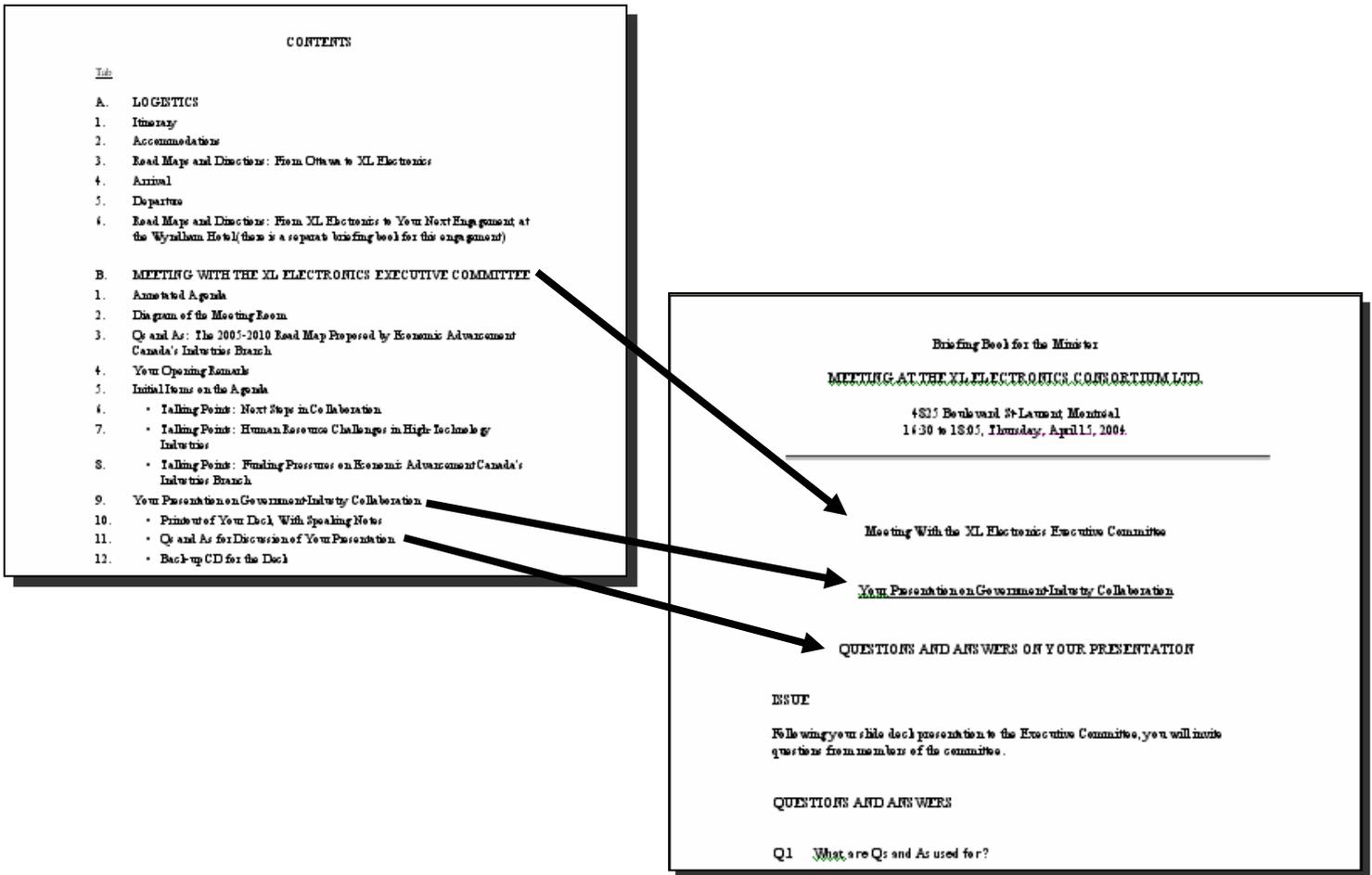
Date and Time

The date and time of the event are used only where absolutely necessary: on the binder labels, the table of contents, the itinerary, scenario notes and on labels for a CD. Avoid placing them elsewhere if you can. This avoids the need to revise a large number of files if the schedule changes at the last minute – as it so often does.

Generic Material

Much of the material in a briefing book is generic in the sense that some types of material might appear at any level in the book, depending on what activities they relate to. This brings us back to the need for a creative, flexible and systematic approach in designing a briefing book. Take, for example, media relations, which is discussed above. Media relations material could be placed at any level in the briefing book, depending on how broadly or narrowly it applies to activities. Other examples include: logistics, background, profiles of key participants, and scenarios.

Let's examine another example in the Briefing Book for a Complex Event. Look at the Table of Contents under the section labelled Tour. You will see that background material (either a briefing note or a third-party document) is provided under each area of the tour. However, for the whole book there is also a separate section of its own for the background that applies to all three events of the engagement. In some cases, you might even find that you need to prepare a complete book on nothing but background. This might be the case for five-day mission abroad where many related events take place in one distinct region of the world.

An astute reader will also notice a good deal of similarity between sections on itineraries, scenarios and annotated agendas. Your good judgement will be required in determining how much detail to put into any one of these items and when, say, an itinerary needs to be sub-divided into a number of scenario notes. This might also apply to scenarios. Indeed, if an event is sufficiently complex you might need to produce one scenario covering the whole event, plus several sub-scenarios covering various activities that take place during the event.

The same flexibility should be applied to items such as talking points and questions and answers.

Title Pages

The templates make ample use of title pages. They are not restricted to dividing major sections (i.e., tabs A, B, C etc.). Rather, they are also used to set off subsections.

As the user flips through the book, he or she should never be forced to deduce that the book has stopped talking about one subject and is now talking about a new one. The title pages help to avoid that problem. They tell the user that he or she is about to encounter material about a new subject.

Third-Party Documents

The common look and feel means that the user will never flip to a tab and be confronted with a document that is foreign and whose relevance is unexplained. For example, in some places the book may provide third-party documents such as reports, newspaper articles or other material. Each such document should be covered by at least a short note, presented in the standard format, that explains what the item is and what is significant about it. This avoids forcing the user to read the whole item to figure out for himself or herself what it is and why it is relevant.

Mechanics of Production

Tabs

You will often need to subdivide the tabs. If, for example, you use a single sequence of numbered tabs for 48 items, you will be put in a time squeeze if a last-minute change occurs that requires you to insert a new section between tabs 11 and 12. It is far better to subdivide the tabs into sections A, B, C, D etc., with each tab within the sections in a numbered sequence of 1, 2, 3, 4 etc. That way, last-minute additions mean that you don't have to rearrange more than a handful of tabs.

The subdivisions, however, raise a new problem. You will often find that the numbered tabs hide the lettered tabs. That means that the user must awkwardly

flip through many tabs in order to find, say, Section F. The solution lies in buying custom lettered tabs. For a premium, your stationery supplier can provide lettered tab sets in which the lettered tabs are arrayed across the top of the page, rather than down the side. That way, the numbered tabs cannot hide the lettered tabs. Here is an example:
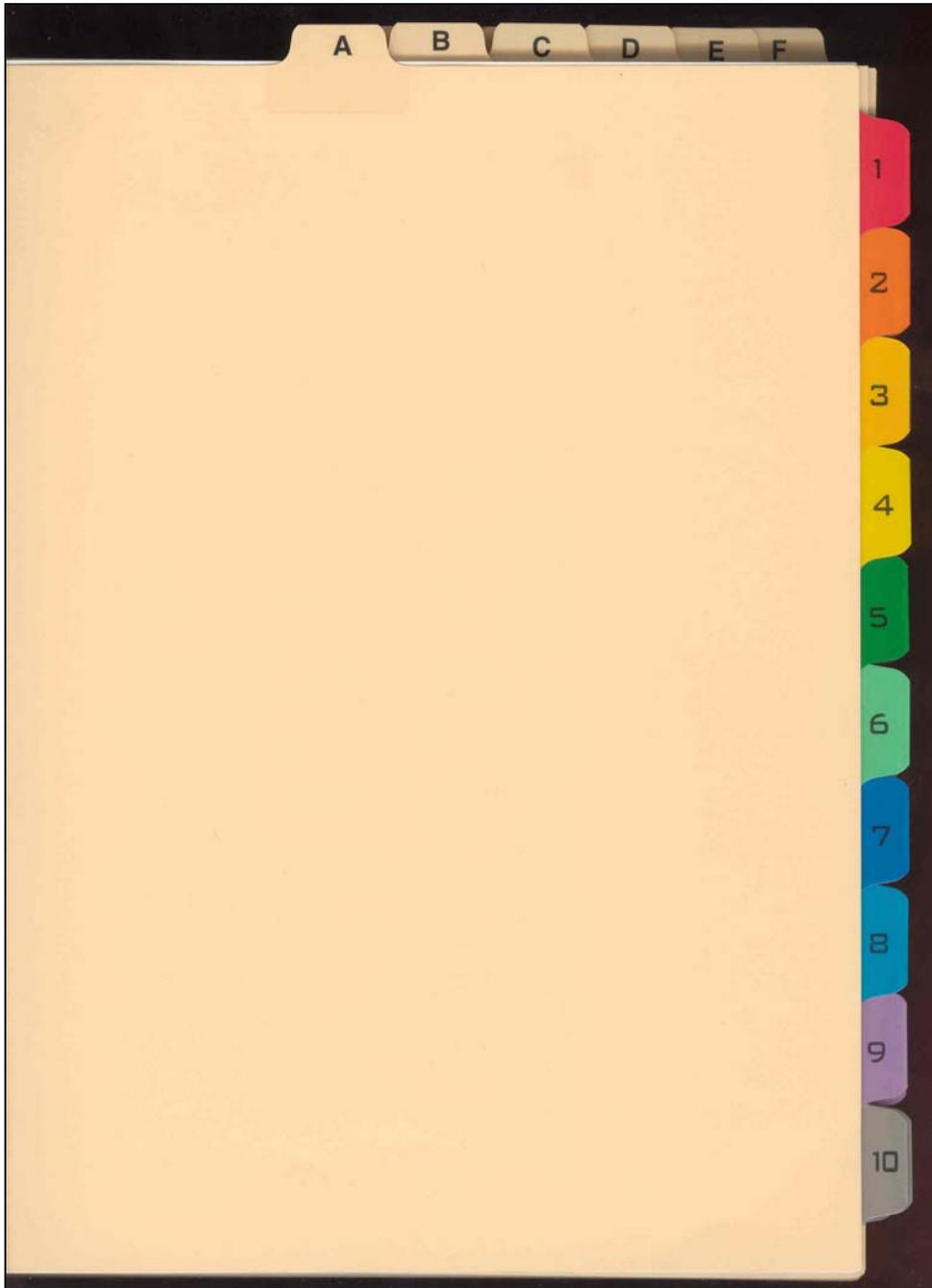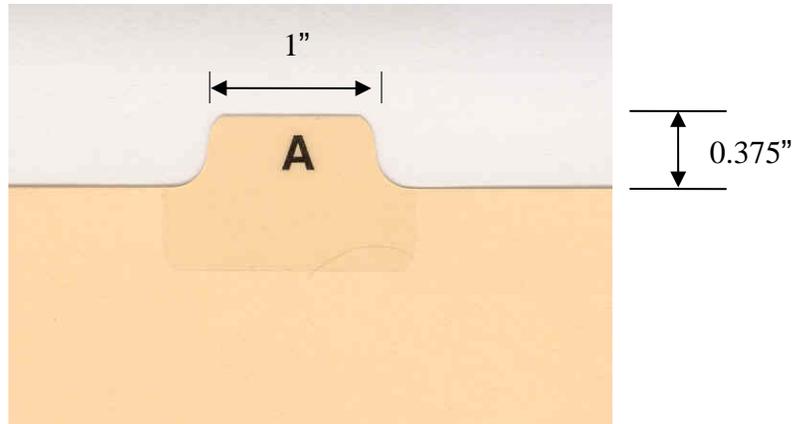

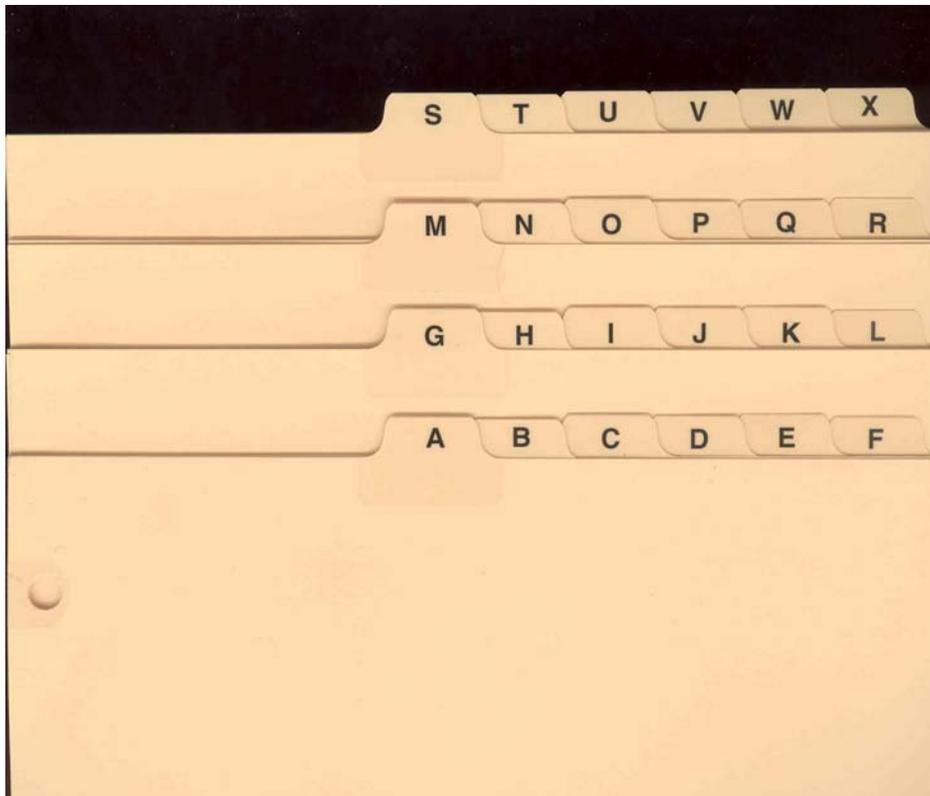The following two pages provide specifications that you can give to your stationer.

3.375"

A B C D E F

11"

8.5"

Four rows of tabs. Six tabs per row. Tab labels run from **A** to **X**, printed on both sides.

Title Page

The templates do not provide a title page at the front of the book. A title page would serve only to hide the table of contents, which is what the user needs to see upon opening the book.

Table of Contents

You will see from the templates that no tab divider is placed on top of the table of contents at the front of the book. Instead, place a clear plastic sheet protector on top of the table of contents. This will protect the table of contents from the wear and tear of being at the front of the book. At the same time, it avoids hiding the table of contents under a tab divider, which can be irritating.

Binders

There are many types and sizes of binders available for briefing books. My preference is for Acco slant D-ring binders. The slant D-ring holds more pages in the same size of binder. It also leaves the user with a book that is much easier to open, close and flip through.

The size will depend of the volume of material to be housed in the binder. The binder should be slightly larger than is needed to simply contain the pages. It should be large enough that the pages can be turned with ease. This makes the book easier to use, and also reduces wear and tear on the pages.

Binder Labels

The front cover of the binder should have two labels. One will be the title of the book, including the name of the event, the date and the location. The other will be a copy-for label (e.g., "Minister's Copy" or "Copy for the Minister's Office").

On the spine there will be one label, again providing the title of the book.

Numbering and Bullets

When you work with numbered or bulleted headings and paragraphs, you may find your word processor's auto-format functions are either helpful or aggravating. You can turn those functions on or off, depending on your preference. Consult

your word processor's help menu for guidance on how to do this.

Photocopying

When it comes time to photocopy the briefing book, you will have to decide whether to print back-to-back. Three factors should affect your decision: weight of the paper you use, ease of photocopying, and thickness of the briefing book.

If you print back-to-back and the weight of the paper you use is too light, the print on one side will show through on the other side. That can make the text on either side hard to read.

Ease of photocopying is a major consideration. With back-to-back coping, the problem lies in the fact that you need to copy sections of the book one by one, not the full book all at once. Unless each and every section has an even number of pages, you will not be able to copy the whole book back-to-back all at once. You have three options:

1. Print each section separately back-to-back.

2. Add blank pages as needed so that each section has an even number of sheets, and then print the whole book back-to-back

3. Print the whole book single-sided.

The thickness of the briefing book is another major consideration. You do not want to end up with a briefing book that is so thick that it is unwieldy to use. If you approach that point, you may need to print back-to-back, whether you like it or not.

Hole Punching

In selecting a hole-puncher for sheets of the briefing book, aim for a punch that has holes large enough that the sheets can be flipped on the rings with ease. This is easier for the user and reduces wear and tear on the sheets.