Tool 5.2 – Briefing Instructions and Template

Briefing internal and external audiences is an important step to secure support and identify champions who value the work and make it possible to continue current projects and queue up future projects. Therefore, planning and conducting briefings is an important milestone that should be included in any data analytics project. The purposes of briefings are to (1) strengthen support among those interested in the data analytics work that you are doing in your project, and (2) generate ideas and demand for the next set of questions or project. The purpose of this tool is to offer questions for consideration and discussion as you prepare to communicate about your data analytics project.

Instructions: Consider the following questions to complete the template.

What: How are you telling the story of your project as you enhance your data analytics capability? How are you demonstrating the value of data and data analytics to various audiences so:

- The potential is appreciated so that demand for analytics continues.
- The resources needed are preserved amid competing demands.
- The findings or insights are used for decision making.

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Who: Who is your target audience(s)? You identify key individuals whose understanding, and support of your data analytics project will increase the likelihood that it is understood and can continue. Who appreciates the potential of data and data analytics; preserves resources for analytics efforts; uses the insights for decision making? Any of these individuals can be in your target audience.

- Peers
- Supervisors
- Managers, mid-level and senior
- Executive leaders
- External (for example, media, legislature, auditor)

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Purpose: What is the purpose or what is your intended outcome?

- To discuss and debate
- To request more resources (for example, staff time)
- To inform next steps of a project or the next project (for example, next question or hypothesis)
- To make decisions, types include:
  - fiscal or budget
  - policy or legislative
  - administrative or program rules
  - research and evaluation

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What: What is your message? This will be customized to the audience whose ongoing support for data analytics and resources to make decisions using data is needed.

- Executive summary of findings and recommendations (for example, major headlines)
- Program and policy implications
- Technical explanation of data sources, code, definitions

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When: When is the right time to deliver the message to achieve your purpose? The timing of a briefing is most informed by the briefing's purpose and can be dependent on the audience's availability or appetite for the information.

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