

UNSERIOUS

# Upshots Cheat Sheet

COMMUNICATING IDEAS THROUGH BRIEFING

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"Most of the time that a decision gets made, you're not able to be in the room. So a solid brief really helps us focus our story and tell it story for us. It brings stakeholders along and wins sponsorship for promising ideas." - J.B. Skelton

## The Upshot

### WHO IS THIS FOR?

- Anyone who has a kernel of an idea and wants to tighten their thinking to see if it has some legs in the real world.
- Anyone who has to organize information for leadership teams to make key decisions.
- If your team has inherited an initiative or project that might lack focus or a clear objective to understand how it can align strategically to other goals.

### WHY IS THIS IMPORTANT?


- We have limited opportunities and time to share our ideas and influence decisions. A solid brief helps us focus our story, bring stakeholders along and win sponsorship for promising ideas.


- Briefing helps us determine if our great ideas are coming at the right time.


## HOW TO DO IT?

1. Context: Start with a problem statement - what is the background issue? if this idea fell out of a coconut tree, what is the context in which this idea exists? Is there a key insight +that sheds new light on solutions? Keep it tight and try to limit yourself to 3-4 sentences.
2. Objectives: Articulate objectives that clearly align with team/org/company objectives. For example, this a marketing program that is designed to boost customer satisfaction or a content strategy that will enable app users to resolve product questions without burdening call center staff.
3. Operating Plan & Goals - Without going into full detail (save the Gantt charts for another doc), explain how will this idea or program will come to life. Who is responsible for what? What are some key dates and milestones? What are KPIs?
4. Watchouts - what are some potential pitfalls and conflicts that could derail the project.

## PITFALLS AND PRO-TIPS

 If you are writing a brief to influence a leader or leadership team, go back and read their published priorities and goals. Whether your brief aligns with their priorities is usually a great indicator as to whether your idea will move forward or not.

 A good brief paints the picture of what happens when your idea is implemented... a truly great brief will paint a picture of what the world looks like if your idea is NOT implemented. Asking your leaders to consider and compare the impact if there's no investment in the problem area or if there is an investment in a different idea can be incredibly powerful.

 Don't think you have to be a much of a writer to put a brief together. Bullet points work fine and you don't have to go into too much detail. Try to limit yourself to two pages max as a forcing function.

 If the idea's logic is falling apart as you write it out... don't force it!

# Guest Contact

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