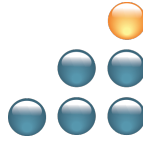




Shownotes

How To Give a Decision Briefing



[Blog Post]

This cast describes how to give a decision briefing to your manager.

[Cast]

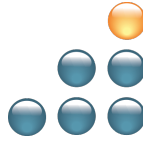
We need a decision from our boss, and we can't get one. What do most of us do? Complain to our peers. This is not a recipe for success, nor changed behavior on your boss's part.

Usually, bosses don't make decisions because there's less pain associated with not making it than there is in making it. Once a boss makes a decision, she has the risk of being wrong. But until she makes the decision, very possibly the negative is that we get less time to take action because we're waiting on the decision. In other words, "no" pain for the boss.

How do we get our bosses to make a decision? How can we present a chance to take a decision in a way that maximizes our chances of getting one?

- 1. Use The Career Tools Decision Brief Model: SOCRR**
- 2. Situation**
- 3. Options**
- 4. Comparison**
- 5. Recommendation**
- 6. Request**
- 7. Always Consider Two Hidden Factors: Time and Risk**
- 8. Use SOCRR Always – Longer or Shorter, Versus Important Enough or Not**
- 9. Effective Decision Briefs Are Virtually ALWAYS Pre-Wired**

1. Use The Career Tools Decision Brief Model. Lots of bosses don't make decisions when we need them to because we haven't effectively told them what we need, and we haven't done anything more than send an email or pop by and mentioned that there's a decision waiting. *If that's all we're doing, we're sending a message that the decision isn't important.* It's time to elevate the importance of the decision in the mind of our boss. We do that by putting together a professional briefing, making options, analysis, risks and recommendation clear. That's the CT Decision Briefing Model, abbreviated SOCRR: Situation, Options, Comparison, Recommendation, Request. We admit it's an American model, otherwise we would have called it Football. But it will work anywhere.



What you do is that every time you need a decision from your boss, you go through this five step process. We've provided a simple PowerPoint Template with basic guidelines for those of you with Premium Content. It's basically fill in the blanks.

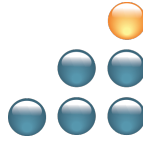
Some of you will hesitate, because you'll worry that you'll get the details wrong, or miss something. For many of us, putting together a briefing makes more obvious any hole in our knowledge, or weakness in our thinking, or missed assumption. We get that. But most of us are also unaware *of the risks associated with ineffective behaviors that we have become comfortable with*. That is, just because you haven't been using this format up until now, don't assume there haven't been negative repercussions. There have been. Your boss has delayed many times because you haven't done this work for him, making one of the many decisions he has to make easier. While there are presentation risks associated with being a little bit more formal here, they are far smaller than the decision risks, action risks, and reputational risks of not doing this simple preparation and delivery. The first couple of times you do this you won't get it right, exactly, but you'll get *major credit* for knowing what to do and how to do it, and will be forgiven for stepping up your game. And if your boss has never seen one, wait until you hear that he uses it when briefing *his* boss.

Just to be clear, you'll need to prepare this briefing, and schedule time to brief your boss once you do. We'll tell you here how to prepare it – what the basic components are, how to think about each part.

2. Situation. Actually, situation is the second part of the briefing. With any standard briefing you're going to give your boss, or, group of higher level managers, or an executive level session, you start with an Introduction, which basically ought to be called Purpose. For a decision briefing, you tell your boss or the group you're going to give a briefing the purpose of which is to obtain a decision on whatever issue you need a decision on. It might sound like this:

Good morning. The purpose of my briefing today is to obtain a decision from you regarding which vendor to choose for supporting our new location on the Monterey Peninsula.

It's important to note that we don't recommend you say, *I'm here to brief you on our location on the Monterey Peninsula*. If you do that, more senior level folks are going to immediately assume you're giving them an *Information Briefing*, which is just an update. You might think, *well, but I'm about to tell them that I'm going to need a decision...* but by that time it might be too late. (It's certainly possible your boss will tolerate the sloppiness, but why be sloppy in front of your boss, and lose an opportunity to practice being crisp for when you need it in front of an executive group?)



You've got to say, quickly, almost immediately, that *the purpose of your briefing is to obtain a decision*. If you don't, you're in danger of sinking into the mire of everyone else's briefings, where *by definition* it's an information briefing. Lest you doubt it, we'll be emphatic: *if your decision briefing is at any time mistaken for an information briefing, you won't achieve your purpose because you won't get a decision*. Why? Because the moment you're giving a decision briefing, your audience will tune out. They'd prefer to save time by reading your slides, or a one page memo, or something – anything – that summarizes your points so they can move to what they do, which is to decide things.

Okay, so that's just purpose, for which we didn't even have a letter in our acronym. But don't miss it – state your purpose early/immediately. If you really want to be clever, follow the Army Rule: *Tell 'em what you're gonna tell 'em, tell 'em, and then tell 'em what you told 'em*. It would sound like this:

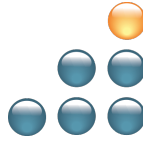
Good morning. The purpose of my briefing today is to obtain a decision from you regarding which vendor to choose for supporting our new location on the Monterey Peninsula. I'm going to share the basic situation and facts with you, and then lay out the options we're considering. Then I'll do a comparison of the options, followed by my recommendation for which option to choose. Then I'll ask for your decision.

Okay, now back to our “first” point in the model, which is Situation. What we're going to do in this first part of the Career Tools Decision Briefing is lay out the facts and basic parameters surrounding the decision. Situation is where you talk about the facts surrounding the decision.

For instance, if you were asking for a decision to fund a new retail site on the Monterey Peninsula, and the decision is between two different choices (or no site at all), you would describe the market research, site development work, competitor locations, local construction costs, environmental impact reports, etc.

If you were asking to buy a new piece of manufacturing operations software, say to monitor inventory levels, you'd include in the situation present costs of inventory handling and/or loss, time it takes to prepare reports using existing system, cost of maintenance of existing system, etc.

Note that it's not *history*. This is a common mistake. It comes from the idea of a narrative, or making a dramatic presentation, and so much of what we know about drama comes from stories. And stories are chronological, and therefore have a history. Don't fall into the trap of giving your audience the history of how you or the team “got to where we are today.” The Situation is essentially *where you are now*, and you focus on the facts of the now rather than how you got where you are. If you find yourself using the



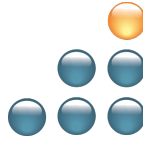
phrase, “and then,” ala *Dude Where’s My Car*, you’ve gotten into history or dramatic story territory. *Asking for a decision is not the time to tell a dramatic story. Let the power of your recommendation and the strength of your comparison be the drama. **Avoid telling stories despite what everyone will tell you. It’s only for really big or unique decisions and still requires the workmanlike value of the Career Tools Decision Brief SOCRR Model.***

One other point: it’s possible you’ll be encouraged to **skip** the Situation if your Decision Brief is the culmination of a series of information briefings to the same group. *We know all this, move along, move along...* is probably how it will sound to you. Generally our guidance here is *resist this suggestion*. We don’t know who you will be presenting to, so it’s possible if you cross them they’ll crucify you. Pun intended. But generally we recommend you counter with, “I’d love to in the interest of time, but there are a couple of situational points that the comparisons are built on, so I’ll just cover them quickly and get right to the options and comparisons.” In this way, you acknowledge the request, say you’re going to speed up, and we do recommend you be somewhat more brief than you might have planned on being. ***But don’t skip Situation entirely.*** Not everyone who has been at every meeting heard everything you or others have briefed. Different folks hear different things based on their role and interests. Further, *you’ve likely built your presentation on following your logic about what you know you will have already said. Skip too quickly, and you may regret something you left out in the Situation by going too fast.* When you have to go back and re-cover it, you make the person who encouraged you to go fast look bad.

3. Options. After you’ve framed the situation, describe the Options being considered in the decision. You don’t start describing what makes them good or bad yet. You list the possible options, that’s pretty much it. You don’t have to describe the key differences yet – just show the options, and give a brief overview description.

When Mark has done these, he has really struggled to not just naturally go into each option’s pluses and minuses right away. It doesn’t work well. You’re going to rush, and not cover everything, so it will come across as biased. Those who think you’re biased against their choice will likely interrupt, or tune you out, reducing the effectiveness of your briefing and their decision.

Also, be careful to ***not describe the analysis you’re going to use yet either.*** There’s a simple selfish reason, but there’s also a better one too. The simple reason is that the moment you describe the criteria, *the audience* will start to use it. Further, they will not only use it, they will ask you to fill in certain parts of it (in perhaps whatever way serves their interest, or hurts another’s interests). This causes you to likely be perceived as biased, either because whatever details are asked for are likely to be notably different.



Further, if you share one, you share multiple, or again you're biased. Finally, *the moment you answer one audience member's question, the gates are open and let the floodwaters begin.* **Mentioning criteria now means getting into analysis now, which is inherently ineffective and inefficient.**

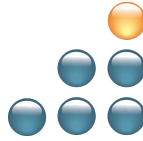
If someone asks for a piece of data, *even if it's data that causes your recommended option to appear an early favorite*, simply respond by saying, *"In the interest of the briefing, I'm going to hold off on details of each option until I share the criteria, and I'll be there in just a minute."* The fact is, describing the options doesn't take long, and you'll get to the comparison very quickly.

Keep in mind that you've got to include the Status Quo in virtually every decision briefing. Don't call it "doing nothing" – that gives it a negative connotation, as most managers and certainly executives aren't keen on thinking of themselves as "do nothing" kinds of people.

There's a reason for this inclusion that is made obvious with a simple example. Suppose you're trying to decide which video system to buy for checking quality on a manufactured part. There are two vendors both of whom you have relationships with. The price differences are notable, but so are the quality differences. You could justify either choice – one because it's more cost conscious, the other because of reliability. And, the group could argue and not agree...and decide to wait, because both are expensive. They see both choices as good but pricey. *But if you include the status quo, which produces errors on 3% of parts when customers expect .03% errors, you make clear the risk of not choosing either of two options. Without the status quo, doing nothing looks like a good cost savings.* **By including the status quo, it's more obvious that the choice isn't between two options, but rather three, each with its own strengths and weaknesses. A significant weakness in a status quo solution may make a good decision out of choosing between two weak other weak options, and your job is to drive a good decision.**

4. Comparison. Now you compare the options you have presented. But first, you've got to detail the criteria you're going to use for the comparison. **If you want your recommendation to be credible, you have to deliver well the three components that precede it: the right options** (all that are reasonable to consider), **the right criteria** (which will be applied to all), and **an honest comparison** (don't get caught with your thumb on the scales towards your recommendation.)

So, you lay out the criteria, whatever you believe are reasonable. *Seasoned executives will likely attack any recommendation based on the criteria (and/or weighting thereof) rather than simply disagreeing with your conclusion/recommendation.* The criteria you choose to compare options are where to spend the most time if you want to ensure a credible response to any recommendation. If you think you can skimp



to favor your recommendation, beware. Frankly, if you have to get creative to favor your recommendation, beware. Seasoned listeners will see through that. [It's not unusual to see weighted comparisons, and objective analyses where numbers and or weights are used, but we're going to leave that for a later show. – M&M]

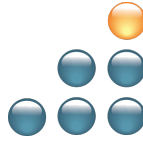
So, you've picked 3, 5, 10, however many criteria. (Ten's probably too many, but that's also a different cast.) You list all of them, and talk briefly about each one, before showing any application of the criteria to the comparison of options. We're trying to stay away from any behavior which looks or feels like choosing or recommending yet!

Think a bit about each of your criteria. A lot of junior managers mistakenly believe that because "Cost" is almost always a decision criteria, most criteria should easily be stated in a word or two. They cannot. Think about "cost". Thanks to its prevalence, it comes with a *given and widely understood measurement: less is better*. So, if you list cost for a purchase, assuming you're comparing apples to apples (not trivial, in many cases, but anyway), everyone understands what the three options' relative standing is in that category simply based on a number in that row of your decision spreadsheet. (We're not saying you need a spreadsheet, just illustrating the rows of criteria versus the columns of options with a tool you probably know.)

But now think about the decision about putting a retail location on the Monterey Peninsula. Surely, "Location" is something that's got to be considered, right? Sure, of course. **Nevertheless, "Location" itself CANNOT be a criterion.** Why not? Because there is no inherent understanding of the value of different locations.

There are two ways you can structure your decision matrix of criteria versus options. The first is to have each criterion explained in detail, including its own measuring standards. In this case, the criterion itself implies an evaluation of the options, leading to probably either a ranking or a relative value standing assigned to each option.

For instance, in our retail example, if the Location criterion were handled this way (as would all the other standards – all have to be handled the same way), the criterion would be "Location – corner lot, 3,500 ft², Traffic pattern A or B, 11-15 Parking spaces, Total Radius Income > XMMUSD." This way takes more explaining up front, when you walk everyone through your criteria, but you save time when you talk about each option's relative standing. Note that you don't have to list in writing every single sub-factor



(particularly on one as detailed as our retail example) on the key slide which shows your comparative analysis. You just have to explain it, and if it is a bit complicated, providing it in writing is a good idea.

The other option is to just list each criteria, with the broadest possible title. Location would be all you'd mention in our retail example, when you were walking everyone through your criteria. But now, in each Option's column, *rather than having a ranking, or result, of the comparison somehow quantified or qualified, you would list the factors associated with that criteria for each option.*

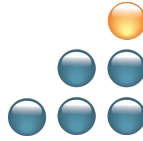
Following our example, Location. You might have, in the "field" for Option 1: "Non-corner, 4200 ft², Traffic BB, Parking 10, Income 114KKUSD." For Option 2, you might have "Corner, 3400 ft², Traffic A, Parking 16, Income 199KKUSD."

Neither is inherently better. The first frontloads the evaluation of the criteria, and lets you do more upfront (and perhaps use more judgment in the comparison), and the second feels a bit more like fill in the blank, leaving more judgment to the audience. In both cases, the underlying factors of the criteria are the same. It's a question of whether to present raw data in the table/chart (version 2), or evaluate and then rank the Options against a clear standard (version 1). Your call, because it's your audience. ;-)

From a visual standpoint, it's nice to have a slide (provided the criteria and options make it possible) which shows an empty table with the Options and Criteria where you describe the criteria first, followed by a slide or slides showing each column or the whole table filled in with more data or rankings. This isn't necessary, but it flows very well in our experience, and keeps the focus on the analysis and recommendation, leading to more decisions.

In the Comparison Step, then, you describe your criteria, and then compare each of the Options you are considering against the criteria. You have to walk through each Option, comparing it to each criteria. In a big audience, there will be vested interests aligned with each of the options and probably criteria as well. Don't skimp, don't stint, don't skip. Cover each. Heaven forbid you offend the lone supporter of the weakest option, only to have him pepper you with questions, and derail you, and fracture whatever chance you had of getting a coalition to support your recommendation.

5. Recommendation. So, you've shared the Options and Comparison. Now it's your turn to discuss what conclusions you have drawn from the comparison, and make a recommendation.



These last two steps are brief! The recommendation step doesn't exist to allow you to go over the comparison – you've already done that. It might be as simple as, *"based on this comparison and our clear concerns about location and income, my recommendation is to purchase Tract B and build our outlet there."* [To be clear, the comment just made about location and income could be a form of soft weighting, as an example.]

Never forget that your professional obligation here is to drive a good decision for the organization. Pushing your recommendation isn't against the rules, but be VERY careful about manipulating the comparison to get the right answer. Seasoned execs who disagree will destroy you for it, or, if they agree, they'll never trust you again.

6. Request. This is a bit old fashioned, but sadly it's necessary. Too many decision briefings slide into Information Briefings. Too many decisions *don't* get made because there's not clear closure at the end of a meeting expressly intended to create a decision.

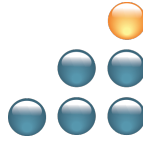
Yes, there is risk with asking for the decision formally, out loud, at the end of the brief. *But not doing so is a fundamental trashing of the reason for the meeting/briefing. Never be afraid of being clear about, and then achieving, your purpose.* Sure, it's possible you'll get a, *"we'll get back to you,"* but that's still better (though less private) than not asking and hearing later that the decision maker HAD made the decision but you didn't hear it because you didn't ask. Don't feel bad for putting the decision maker on the spot. If they're not comfortable with that, they're the wrong person to make a decision you're briefing them on.

How does it sound? It's not hard, but you might want to practice. ;-)

I've recommended Option B. What's your decision?

7. Always Consider Two Hidden Factors: Time and Risk. This is a small but important checkpoint to add in to your process. Ask yourself, for each of the Options, and for the overall decision, what is the cost or risk of delaying a decision, or conversely, the value of moving more quickly? It doesn't *necessarily* have to be a listed criteria...but you have to know what the effect is.

The same is true for risk. Think about each option. Maybe it's a contract risk, maybe it's a reputation risk, maybe it's a resource after the purchase risk. *Think about it, and be ready to address it. If risk or time*



have a particular positive or negative affect on one Option, make sure it's addressed, if not included as a criteria.

8. Use SOCRR Always – Longer or Shorter, Versus Important Enough or Not. We've made this discussion as broad as possible, because these principles apply whether you're briefing the board on a 500MM USD overseas expansion, or a 1M USD copier purchase/lease decision. The question to ask yourself is not whether to apply the concepts here – that's a given. Don't skip this for the copier and use it for the expansion, otherwise you won't be any good at it when it really matters. The question to ask is, is this a big enough decision to have 8 criteria, or are three okay, and do I need to weight them?

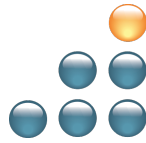
Think of the rigors of the process, not the value of the decision. *Use small decisions – including your own, by the way – to get better at briefing and making bigger ones.*

9. Effective Decision Briefs Are Virtually ALWAYS Pre-Wired. Holy Moly, if there's ever been a case for using the Manager Tools Pre-Wire guidelines, this is it. Pre-wiring could change your criteria, your options, your weighting, your factors associated with criteria, the timing, the risk... **everything!** If there's one person making a decision but she's going to turn to her team for input and they are going to be in the meeting, you better pre-wire this whole thing with them first.

Wrap Up

- 1. Use The Career Tools SOCRR Decision Brief Model**
- 2. Situation**
- 3. Options**
- 4. Comparison**
- 5. Recommendation**
- 6. Request**
- 7. Always Consider Two Hidden Factors: Time and Risk**
- 8. Use SOCRR Always – Longer or Shorter, Versus Important Enough or Not**
- 9. Effective Decision Briefs Are Virtually ALWAYS Pre-Wired**

It's not just that our bosses don't want to make decisions – it's that we're not making those decisions as easy for them as we can. If you're a manager, think about your willingness *and ability* to make a decision if one of your directs came to you with the CT SOCRR model. That's what you want from your boss, so give it to him. Take the time, lay out the options and your recommendations, along with risks and timing, and



ask for what you need. Let's stop complaining, even though it sure feels good, and start getting what we want as professionals.