



Charles Sturt
University

Writing Business Reports and Executive Briefs

DIVISION OF PEOPLE AND CULTURE

ANDREW MASHMAN & JO ST JOHN

A word cloud on a dark teal background. The words are in various shades of green and pink. The most prominent words are 'Brief', 'Distil', and 'Insight' in large pink letters. Other words include 'Connected', 'Sentence', 'Audience', 'Making', 'Target', 'Message', 'Concrete', 'Knowledge', 'Accurate', 'Action', 'Format', 'Conversational', 'Feedback', 'Correct', 'Decision', 'Communication', 'Concise', 'Information', 'Complete', 'Executive', 'Response', 'Succinct', 'Rationale', 'Active', 'Clear', and 'Purpose'.

Connected
Sentence
Audience
Making
Target
Message
Concrete
Knowledge
Accurate
Action
Format
Conversational
Feedback
Correct
Decision
Communication
Concise
Information
Complete
Executive
Response
Succinct
Rationale
Active
Clear
Purpose
Brief
Distil
Insight



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Acknowledgement of Country

WE WOULD LIKE TO ACKNOWLEDGE THE WIRADJURI, NGUNAWAL, GUNDUNGARRA AND BIRIPAI (OR BIRIPI) PEOPLES OF AUSTRALIA, WHO ARE THE TRADITIONAL OWNERS AND CUSTODIANS OF THE LANDS ON WHICH CHARLES STURT UNIVERSITY'S CAMPUSES ARE LOCATED, AND PAY RESPECT TO THEIR ELDERS BOTH PAST AND PRESENT

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=6U_EUKLXZMS](https://www.youtube.com/watch?v=6U_EUKLXZMS)

Welcome to our Workshop

Learning Outcomes - The training aims to increase capability in: -

- Writing succinct reports - explaining your work and proposing solutions to pain points
- Providing relevant information
- Providing analysis and recommendations to enable decision making
- Understand the principles of business writing

This training is aimed to make your life easier through leveraging your smarts and the University values

There is a separate project being conducted by Governance and Tony Heywood called the Reporting Requirements Project. They are currently mapping the reports submitted to every committee and what needs to be included in them, our training will not cover this area as it is a separate project and out of scope for this training.





**The trouble
is.....**

How do you feel about the reporting work you do
(writing or decision making)?

What challenges you in the reporting or
decision making you do ?



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Unique to Charles Sturt University

<https://hbr.org/2016/09/bad-writing-is-destroying-your-companys-productivity>

Bad Writing Is Destroying Your Company's Productivity

by Josh Bernoff

SEPTEMBER 06, 2016

 Save  Share  ²⁰ Comment  Text Size  Print **\$8.95** Buy Copies



And 81% of them agree that poorly written material wastes a lot of their time. A majority say that what they read is frequently ineffective because it's too long, poorly organized, unclear, filled with jargon, and imprecise.



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Add this to your Resume - Knowledge Management is...

Knowledge Management misconception:

A stand alone program or project and should not be measured as such
An off the shelf product or program that can be copied
Just about getting information and document management
Overloading people with information
Creating additional workload which will not add value
Purely a technology solution

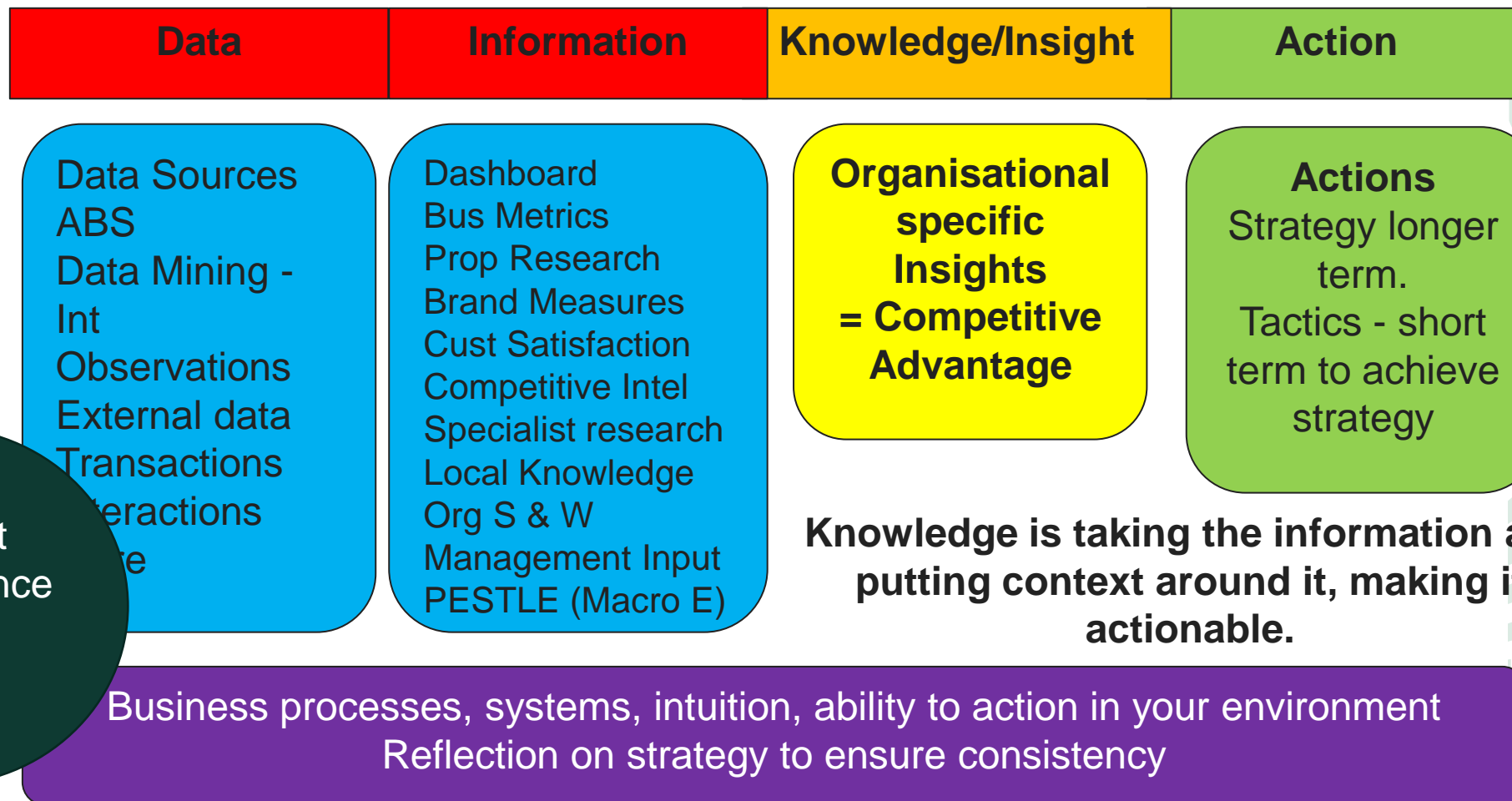
Knowledge Management is:

A way to improve efficiency and productivity to support achievement of business goals
Customised to the organisational structure, products and services
KM has an impact on systems, processes and people. It leads to a change in employee's behaviour and attitudes
Identifying and sharing business critical knowledge
Getting the most from the intellectual capital of the entire organisation
Integrating knowledge management in daily activities, processes and culture



Knowledge - Data to Action - Newslimited

So What ?



Student Performance Report (SPR)



Charles Sturt University

For Charles Sturt
University Strategy

For Charles Sturt University
Students and Researchers

For the Writer

So #@\$%&:-) What ?

For Governance

For Decision Makers

For the Audience



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Values - daily tools to guide your actions



Insightful

In living the value of Insightful we act respectfully and perceptively to seek to understand why people think and behave in the ways that they do.

Digging deep to understand the why in addition to the what, we shift beyond taking words or actions at face value.

Through an open-minded approach we reveal people's underlying attitudes, beliefs and motivations.

An insightful approach means we remove ambiguity, we are each clear and agreed about our goals and actions, and we better position ourselves for success.

Values - daily tools to be where you need to be



Inclusive

Involving others – being welcoming and accessible – enables us to be a stronger collective force.

As a university, we aim to be easy, warm and welcoming. We want our students and **our peers to know they are important to us.**

Education and research is for everyone in our community and our University is stronger when we work together.

In behaving inclusively we work collaboratively to develop and deliver solutions – we value new perspectives. An inclusive approach influences the way we all relate to each other and helps **us all achieve our full potential collectively.**

Values - daily tools to guide decision making

Impactful

Focusing on outcomes and behaving in a consistent and constructive manner enhances our impact on those around us.

As a community of impactful professionals we are each thinking about how to best direct our efforts to secure results for our students and our communities.

We have an accurate awareness of our own selves and of the situation around us and we value the individual roles of those around us in supporting our students and communities.

We take learnings from each of our experiences and have the gumption and tenacity to find a way past difficulties and obstructions.



Values - daily tools to lift people up

Inspiring

Creative in our thinking, yet rigorous in our approach, we drive and lead change and evolution.

Through living the value of “inspiring” we engage and motivate our students and communities to also proactively build innovation and capacity into their lives, careers and industries.

We challenge those around us to leave their comfort zones and support and foster their growth and evolution. We are champions of change with compelling visions and we engage those around us in shaping the journey.

Living this important value creates engagement and commitment from those around us.



Truth and Opportunity

The University wants to survive and prosper, as you do.

Executive Briefs need to reflect the current reality and the truth as the author or Subject Matter Expert (SME) sees it – it needs to be an authentic piece from an expert (SME) in the knowledge area.

Things that decision makers need to know, need to be upfront – good or bad and treated objectively (in clear language) to reflect Charles Sturt University values.

Business writing is outcome driven, it exists to inform, persuade and report. 90/10 – solve problems at the lowest level. Let Managers know the “sticky issues”.

Renee's Video - <https://www.youtube.com/watch?v=w8u63RUEYqA>



Themes in Business Writing

- A. Its content is accurate
- B. Its style is brief
- C. Its message is clear

1.Accurate, so it leaves no room for error or misunderstanding

2.Clearly written, so that it is easy to understand the message and obvious what action the reader needs to take, if any

3.Logical in structure, so the thought process or reasoning is easy to follow

4.Free of errors with proper spelling, grammar and punctuation

5.Concise without being rude, leaving out unnecessary details

- Clear
- Complete
- Concise
- Correct
- Concrete
- Conversational
- Connected to your audience



Planning your Executive Brief



Planning and Audience

What are your reasons for writing the piece you have chosen?

Inform (interest)

Advise (awareness/note)

Change

Action

Progress/Update

What do I want to happen?



What could stop this happening?



What do I need to provide to avoid this?



What content will achieve the objectives of my writing?



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Who can and should help the Executive Brief process?

Subject matter experts (SME) (Judgement & Other Players)

Executive Officers (Facilitation/QA/Proof)

Directors (all distilling & corrections made here before moving up, interventionist in nature – So What!)

Presenters? (SME opportunity?)

What roles should people play ?

Technology

Collaboration, Workload, Timing



 **ATLASSIAN**

 **Confluence**

Accomplish more together

Confluence is your remote-friendly team workspace where knowledge and collaboration meet.



HIGHER EDUCATION

Board Management Platform Designed to Serve Higher Education Institutions

College and university executives, administrators and trustees have long relied on BoardEffect for effective, transparent and secure board management. BoardEffect delivers a complete board management solution that enables leaders and administrators to effectively prepare, collaborate on and review board materials through a secure environment that saves time and resources to focus on their mission.

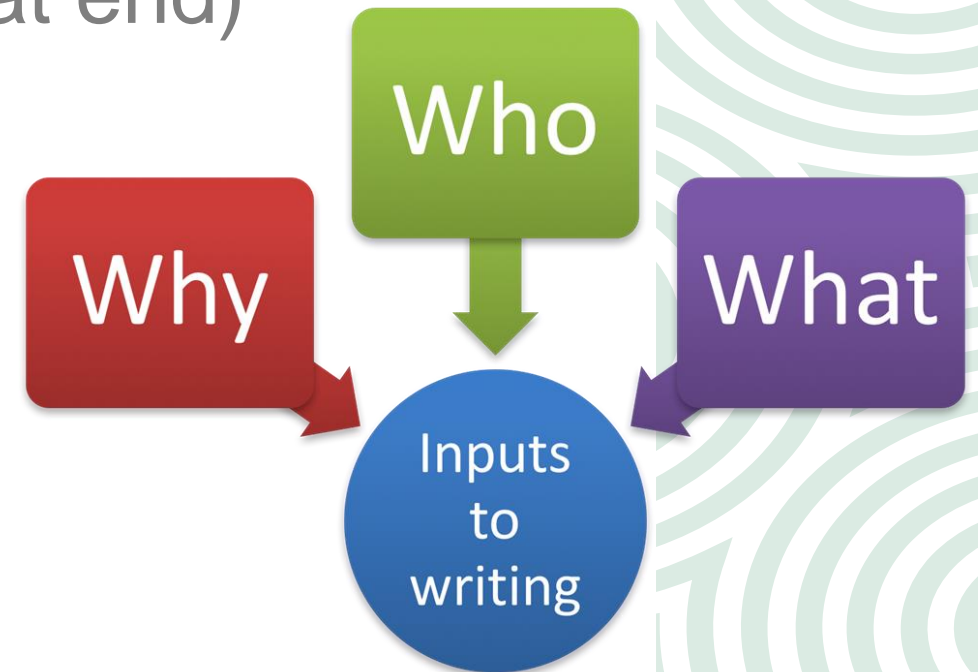


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Structure

What the Target Audience needs to see for Decision Making

- Refer to updated Templates (link at end)
- Purpose (Scope, Context)
Rationale
- Recommendations (Justified)
- Actions / Decisions Required
- Risks
- Links / Sources / Attachments



Evidence of compliance information on approval processes;

- records demonstrating relevant oversight and **decision making**;

Governance – Unique Needs

Staff at the University to be aware of all staff obligations and to understand how these obligations include requirements for the University to ensure that:

The Council requires all staff to be aware of all staff obligations and to understand how these obligations include requirements for the University to ensure that:

with legislative and policy compliance with these obligations.

to-day activities advances compliance with these obligations.

From a practical perspective, This provides a framework for the internal monitoring of the quality of our higher education activities. HESF should therefore be used to guide our business processes and improve our operations, so that we achieve **operational excellence**.

- academic oversight is in place, via policy and performance development, review and reporting; and

Each of us are experts in our area of work and are therefore best placed to understand and implement the necessary processes in that area, which enhance HESF compliance.

It is also important to remember that HESF **compliance is not a 'once in a while' action or 'someone else's job'**. It is a requirement of our registration as a higher education provider, that compliance with HESF be maintained by all of us and at all times. It should be an **every day activity**.

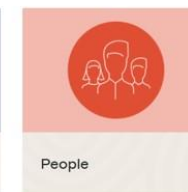
https://www.youtube.com/watch?v=TgOH1_fnUbc



Students



Research



People



Social responsibility



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Know your audience and their committee

Background
and experience

Authority to
make decisions

Preferred
communication
style

How they like
to receive
information

Work priorities
and pressures

Sensitivities

Micro or macro
thinker

Assumptions
you can make

Preconceptions
they may hold



Who are we writing for ? Who are our decision makers ? What are the requirements of your target ?

Imagine you are a Senior Leader, what do you perceive the needs of the Senior Leaders are ?

You meet weekly, 2 hour meetings, decisions impacting students and staff and responsibility on your shoulders. What is your mindset ?

Jane Quinn on Academic Senate

<https://www.youtube.com/watch?v=Z9lChRv0Oz0>

Profile your target

What do we know about the group (ideas, philosophy, education, goals, influencers and stakeholders)

What motivates them

What are their pain points

More



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Writing Business Reports

Charles Sturt

What do Senior Leaders in your space do:

<https://www.menti.com/8sisbnuw5g>

Go to **www.menti.com** and use the code **5067 3230**

Tell me more.....



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What do your Senior Leaders need: (from your reporting)

Based on who they are, what are they likely to need/value/respect?



ELT Executive Brief Template

Date / Type (of brief)

Item Title

Purpose (to provide ELT with...)

Recommendation (ELT resolves to)

Key Issues (good and bad) (uncover dumpster fires)

Financial Impact

Consultation (not everyone will agree – understand and capture issues, workshop with the right people and bring up unresolved (Sticking Point issues) 90/10 model for ELT

Risk Assessment (fit within the current risk appetite)

Attachments (If it's a sign off on questions, they need to see. If its support a director might have needed don't attach. Never more than 20 pages and for Council 10!)

Prepared by (your brand)

Cleared by (ELT Sponsor (endorsing stakeholder)



<ITEM TITLE>

PURPOSE

To provide the Executive Leadership Team (ELT) with [XXX](#).

RECOMMENDATION

The Executive Leadership Team resolves to:

1. **endorse/approve/note** [XXX](#); and
2. **endorse/approve/note** [XXX](#).

KEY ISSUES

This should outline the key issues that need to be brought to the attention of ELT, such as matters/decisions that must be considered and risks you wish to highlight. This executive brief must be self-sufficient in adequately summarising key information/issues without attachments. If attachments are required (e.g., a policy needs to be attached for approval), the main content/takeaways from any attachments should be summarised in the brief.

It should clearly explain the problem to be solved or the decision to be made, or the event/development that has occurred if you are providing a noting brief. It should not simply say the general subject the brief is about and then attach a long and detailed examination of many aspects of that issue.

A clear focus on distilling the necessary information should ordinarily mean that briefs would be no more than 2-3 pages long.

FINANCIAL IMPACT

[XXX](#)

If a business case is required, has it been endorsed by the Division of Finance? **NA** ☐ **YES** ☐ **NO** ☐

CONSULTATION

Which staff and/or committees have been consulted regarding this proposal? [XXX](#)

Was there agreement? **NA** ☐ **YES** ☐ **NO** ☐

If **NO**, please provide details: [XXX](#) (or **N/A**)

RISK ASSESSMENT

Does this matter sit within the current [Risk Appetite](#)? **YES** ☐ **NO** ☐

If **NO**, what are the consequences / risk treatments? [XXX](#) (or **N/A**)

ATTACHMENT/S

- A. [XXX](#)
B. [XXX](#)

Prepared by: _____
Cleared by (ELT sponsor): _____
Name, Position
Name, Position

Break !



Your Goal for EB Design

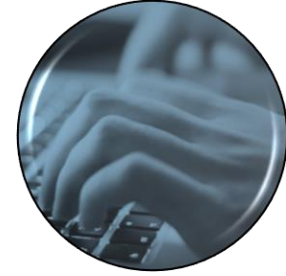
Your goal is to provide clear, accurate information and analysis (Knowledge) about an incident, a time period, a project, or another business activity.

Write a writing goal for yourself to prepare an Executive Brief (or a writing challenge you have coming up) (think S.M.A.R.T)

E.G. For my next EB, I will focus having a dedicated, pre email time in mornings to write 3 days per week, I will consult my team to help brainstorm the structure, my EO and I will edit together to ensure we recommend specific actions and complete a concise 2 page EB by 21/08/2022



Writing – Seth Godin and Mark Twain



Writing Tips and Tricks

Ten words per page

That's how many words get scanned the first time through. Perhaps five on a billboard.

Which means that your memo, your ad, your announcement, your post—you get ten words.

Highlight the ten of the 1,000 you've written. Which ten do you want someone to scan so that they're intrigued enough to slow down and read the rest?

If you can begin with the ten words and write around them, you have the foundation for an effective message.

As Jay Levinson said, the best billboard ever said, "Free coffee, next exit."

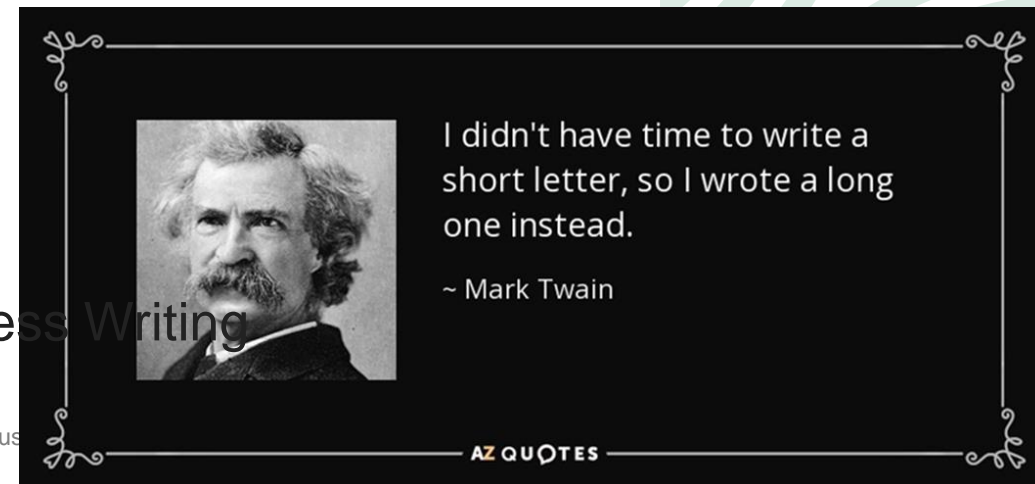
What do we see when we scan your work?

<https://www.youtube.com/watch?v=LrKesGslOYs> Business Writing



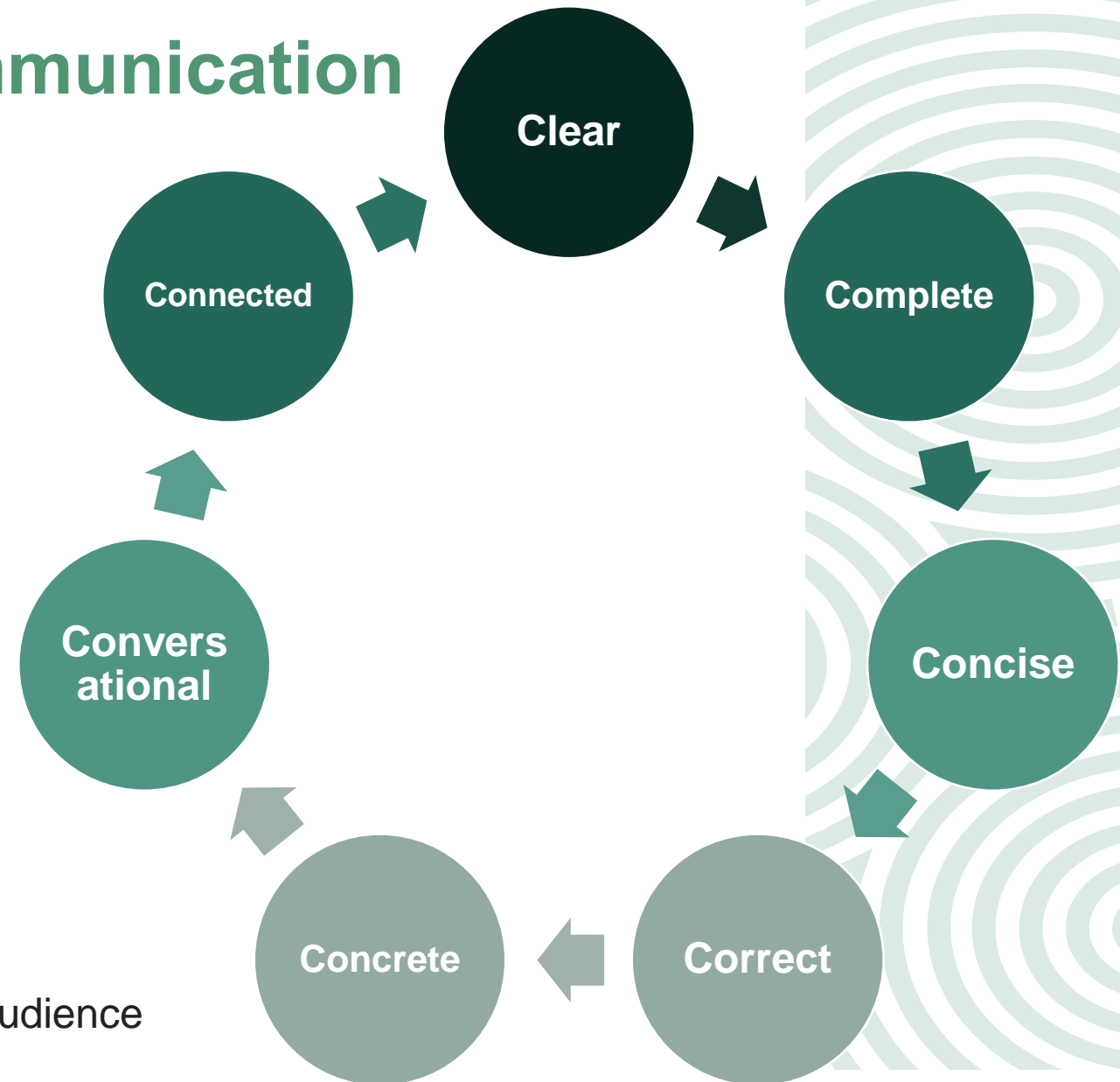
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Writing Bus



The 7 C's of Writing & Communication

- Clear
 - What you write makes sense
 - The intent is clear
- Complete
 - Necessary information only
 - Exclude the rest
- Concise
 - Avoid padding
 - Brief is best
- Correct
- Conversational
 - The information is accurate
- Concrete
 - Avoid the abstract
- Connected
 - Use common language as you would in conversation
- Connected
 - Make an emotional connection to your audience



Clear - Use Plain Language

- Intent is clear (Purpose), do you understand it ? Can others?
- Cut weak or lazy words or replace them
- Use an economy of words; 'write to express not to impress'.
- Avoid wordiness – Is every word adding value, if not, delete it.
- Avoid vague language - adverbs (i.e. especially unique)
- Acronyms – minimise use, always intor in first use, every document i.e Executive Brief (EB)

Clear

**If you can't
explain it simply,
you don't
understand it well
enough.**

Albert Einstein



Clear - Sentences

- Keep your sentences clear.
- One sentence should convey one clear message. If you have two things to say, use multiple sentences to say one thing first and then the other.
- Use simple sentences that have no more than two dependent issues. (ands)
- Where possible, put the subject at the beginning of the sentence.
- Where possible, “keep the subject near the verb, and the verb near the object” (Active).
- Where possible, save the main point or important information until the end of the sentence. (Periodic sentence)

Clear - Use Active Voice

- Strive to write business documents in the active voice, which keeps your writing straightforward and easy to read.
- Writing passively works well in certain situations, especially when writing about research
- <https://www.grammarly.com/blog/active-vs-passive-voice/>

In **active voice**, the subject of the sentence directly performs the action. The active voice uses the simple or root form of a verb. Active verbs do not include forms of “to be” or helping verbs, as in the passive voice. For example, *Monica actioned the 3 recommendations*. In this sentence, Monica is the subject who performs the action of “actioning” the 3 recommendations.

Active:

- The committee extended the deadline. (5)
- The 3 actions have not been implemented. (7) (straight to the point does not hide anything)

Passive:

- It was decided the deadline should be extended (8) (Who decided that?)
- There have been challenges in implementing the recommendations (8) (blurred – what challenges)



Clear - is kind, Brene Brown

Clear is kind. Unclear is unkind.

- Sometimes speaking the truth feels like we are being unkind, especially when sharing difficult information or feedback. But in reality, dancing around the truth is unkind. When we avoid stating the truth—when we are vague or ambiguous under the guise of being kind—it is often because we are trying to lessen the discomfort for ourselves, not for the other person.
- Direct, honest, straightforward communication is kind. Sidestepping the truth doesn't serve a useful purpose for anyone involved.



Writing Structure

Tell your story

Ensure the flow

Be consistent

Don't leave unexpected exits

Beginning

- Get straight to the point
- Link directly to the reader's interests and concerns
- Introduce the main idea of your writing

Middle

- Develop your main idea
- Briefly offer details, arguments, statistics, opinions,
- Make sure the paragraphs are connected with transition sentences

End

- Reinforce the idea and any call(s) to action

Complete



Paint Done - Brene Brown

Paint done

- Painting done means not just assigning a task, but explaining the reason—clarifying how the end product will be used.
- Providing color and context—the purpose, not just the mechanics.
- Sharing the reason for a task helps uncover stealth expectations and stealth intentions, cultivates commitment and contribution, and facilitates growth and learning.



Concise is an Art

- Concise writing is specific, exact, and descriptive.
- Concise is insight, knowledge not information and data (Student Perf Report – target each audience)
- Concise is structure - signpost the journey for the reader
- Concise is clarity, approachable language for the audience
- Concise is brevity with enough context for the selected audience (no more)
- Concise is pointed recommendations and actions (ready to be approved and transferred across)

Wordy Writing: Because of the fact that the watch was inexpensive in price, Joanne bought it. (14)

Concise Writing: Because the watch was inexpensive, Jo bought it. (8)
Or - Jo bought the inexpensive watch. (5 and Active)

Concise

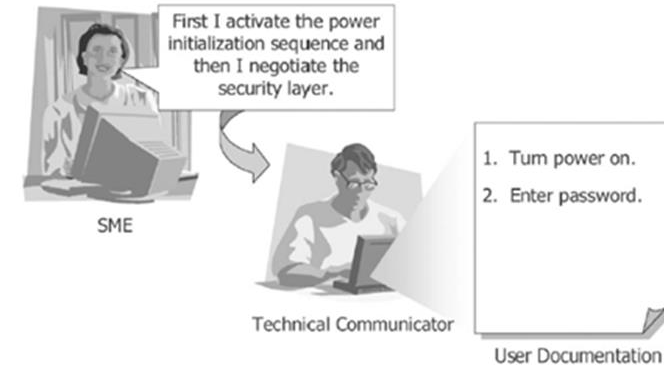


Figure 1. Technical communicator as “packager” of information.



31 Flavours – Distil

- Banana Nut Fudge
- Black Walnut
- Burgundy Cherry
- Butterscotch Ribbon
- Cherry Macaron
- Chocolate
- Chocolate Almond
- Chocolate Chip
- Chocolate Fudge
- Chocolate Mint
- Chocolate Ribbon
- Coffee
- Coffee Candy
- Date Nut
- Eggnog
- French Vanilla
- Green Mint Stick
- Lemon Crisp
- Lemon Custard
- Lemon Sherbet
- Maple Nut
- Orange Sherbet

(61 to 1, 2 or 3)

- Peach
- Peppermint Fudge Ribbon
- Peppermint Stick
- Pineapple Sherbet
- Raspberry Sherbet
- Rocky Road Nut
- Strawberry
- Vanilla
- Vanilla Burnt Almond

5 Seconds !

The flavour I would choose now is ?
Enter in the chat box
How did you do that?



I Was Only 19 (A Walk In The Light Green) Lyrics (413)

[Verse 1]

Mum and Dad and Denny saw the passing out parade at Puckapunyal
It was a long march from cadets

The Sixth Battalion was the next to tour, and it was me who drew the card
We did Canungra and Shoalwater before we left

[Chorus]

And Townsville lined the footpath as we marched down to the quay
This clipping from the paper shows us young and strong and clean
And there's me, in my slouch hat, with my SLR and greens
God help me

I was only nineteen

[Verse 2]

From Vung Tau riding Chinooks to the dust at Nui Dat
I'd been in and out of choppers now for months
And we made our tents a home: VB, and pinups on the lockers
And an Asian orange sunset through the scrub

[Chorus]

And can you tell me, doctor, why I still can't get to sleep?
And night time's just a jungle dark and a barking M16?
And what's this rash that comes and goes?
Can you tell me what it means?
God help me

I was only nineteen

[Verse 3]

A four-week operation when each step can mean your last one on two legs
It was a war within yourself
But you wouldn't let your mates down 'til they had you dusted off
So you closed your eyes and thought about somethin' else

[Verse 4]

And then someone yelled out "Contact!" and the bloke behind me swore
We hooked in there for hours, then a God-almighty roar
Frankie kicked a mine the day that mankind kicked the moon
God help me

He was going home in June

[Verse 5]

And I can still see Frankie drinkin' tinnies in the Grand Hotel
On a thirty-six hour rec leave in Vung Tau
And I can still hear Frankie lying screaming in the jungle
'Til the morphine came and killed the bloody row

[Verse 6]

And the ANZAC legends didn't mention mud and blood and tears
And stories that my father told me never seemed quite real
I caught some pieces in my back that I didn't even feel
God help me

I was only nineteen

[Chorus]

And can you tell me, doctor, why I still can't get to sleep?
And why the Channel Seven chopper chills me to my feet?
And what's this rash that comes and goes?
Can you tell me what it means?
God help me
I was only nineteen

Please Concisely Summarise this into a
max of 3 sentences and 1
recommendation about the topic for
action, into the chat box – 4.19 min



Correct

- Right information
- SME inclusion (right people)
- Checked and workshopped through collaboration and expert inclusion
- Spell checked
- Grammar checked <https://www.grammarly.com/service/download>
- Signed off / Approved (levels where required)

Correct



Concrete

- Not abstract
- Grounded (evidence based)
- Speaks to the use of specific language to capture the essence of the situation.
- Accessible language to assess the truth of the matter



Concrete



Conversational

- Tone for the target audience
- Appropriate level for the audience
- Relevant and polite or engaging greeting
- Topical (headline) to engage and get buy-in
- Relevant or intriguing

The Context

- Is your tone appropriate to the occasion?
- How formal should you sound?

Authenticity

- Straightforward
- Unpretentious
- Honest

Respectful

- Be courteous
- Never be abrupt, rude or demanding
- Respect cultural differences
- Proofread thoroughly

Conversational



Connected

- Target Audience relevant
- Audience members able to grasp first read (can you do it in less than 1 minute per page)
- Linked to ambient events – what's on peoples (target audiences) minds.
- University / Strategy Connected
- Connection to meaning – Evoke a call to action

overt trend that hotels' short-term priorities diverge from the imperatives for successful long-term strategic planning. Much like the ad hoc NPD process at the Newmarket Hotel, it is a steadfast trend within the industry to be risk averse, hesitant to implement formal innovative practices and to lack a clear strategic vision (Martin-Rios, 2022). Through scrutiny of both the NPD processes of the Newmarket Hotel and the broader hospitality industry, it can be deduced that the lack of structure and formal NPD processes may not be limited to the organisation, but instead be part of a larger industry paradigm. Although the organisation does participate in a rudimentary process of identifying opportunities and then trialling and erroring the potential products, this is costly, inefficient, and time-consuming (Martin-Rios,



Break !

“Give yourself permission to slow down.
You can speed up by slowing down.”

– Gabby Bernstein



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An Open-ended Executive Brief

This is a mock-up, but Briefs like this have been presented
Using the 7C lens what do we like or not like ?
Discuss!

- Clear
- Complete
- Concise
- Correct
- Concrete
- Conversational
- Connected to your audience

CAMPUS PLANNING

PURPOSE

Executive Leadership Team (ELT) discussion on the progress and current challenges on the campus futures program

1. Campus Planning

Provide a verbal update to the ELT on progress, challenges, and next steps for Campus Planning. Specific discussion on issue areas to agree next steps or mitigation actions and responsibility (where applicable).

2. Campus Student Load

Verbal update on progress for key initiatives to grow student numbers on campus.

3. Round Table discussion per campus

Campus discussion with the ELT on current planning and progress for each individual campus, including the following considerations.

- Campus vision (working statement) updates and challenges
- Engagement and feedback on the strategy with Regional Consultative Committee, external and internal stakeholders
- Business development progress with community, industry, and government
- Site specific opportunities or challenges – identify and seek further input including Education, Research, People and Social Responsibility considerations
- Next steps in Campus Planning process

The aim is to ensure all ELT member are contributing to define the campus specific planning considerations (stakeholder views, issues, opportunities, and challenges) in an open two-way dialogue seeking comments on all ELT portfolios.

The campus to be covered are listed below:

- Albury
- Bathurst
- Dubbo
- Orange
- Port Macquarie
- Wagga Wagga
- Orange

RECOMMENDATION

The Executive Leadership Team resolves to:

1. **Discuss and collate** the current planning considerations per-campus and collate any additional considerations or actions for follow up as raised by ELT members during the session for input into the Campus Planning process and strategy planning of next steps

An Executive Brief (Trent is working on a more specific version)

This is an Exemplar Brief requesting a decision from the VC.

Using the 7C lens what do we like or not like ?

Discuss!

- Clear
- Complete
- Concise
- Correct
- Concrete
- Conversational
- Connected to your audience

Business Writing and Executive Briefs – Pre-Training VC Review

PURPOSE

To provide the VC with an opportunity to review the training package and its delivery prior to Pilot Session #2 for her feedback and approval to roll out the training package.

RECOMMENDATION

The VC resolves to:

1. **Note and provide feedback on the proposed and tested package** and
2. **Approve the roll out of the training with the incorporated feedback**

KEY ISSUES

This training package has been based on the emerging need of the University, interviews with key decision makers and a survey to 25 staff. This feedback has been assembled into a training deck and delivery plan that has been tested in a workshop session with 8 senior staff who are invested in the need being met.

This groups feedback has been very positive and where recommended, changes have been integrated.

The VC will be reviewing the training deck and delivery plan that will be used for the next 2 pilot training sessions.

FINANCIAL IMPACT

This Training has been budgeted for and on track to date.

If a business case is required, has it been endorsed by the Division of Finance? **NA** ☐ **YES** ☐ **NO** ☒

CONSULTATION

Which staff and/or committees have been consulted regarding this proposal? *The author has worked closely with Jo St John and the draft package has also been reviewed by Maria Crisante, Executive Director People and Culture, Amanda Bennett, Dane Hegvold and Rebecca Slattery.*

Was there agreement? **NA** ☐ **YES** ☒ **NO** ☐

If NO, please provide details: *XXX (or N/A)*

RISK ASSESSMENT

Does this matter sit within the current *Risk Appetite*? **YES** ☒ **NO** ☐

If **NO**, what are the consequences / risk treatments? *XXX (or N/A)*

ATTACHMENT/S

- A. *Writing Business Reports and Executive Briefs (PDF File)*
B. *Nil*

Prepared by:
Cleared by (ELT sponsor):

Andrew Mashman, Founder, Liberated Vision
Jo St John, Organisational Development Advisor | Division of People and Culture

Editing is critical and part of the gig

- Colleague to read
- The coffee break
- Sleep on it
- Read out loud
- Review a hard copy
- Try summarizing your work into 2 sentences, does it make sense
- Edit at your best time (mornings, after a Coffee)
- Word Tools – Spelling and Grammar
- Look at it in the format the audience will see it (PDF, On Screen (large or small))
- Make sure you have strong version control



Editor

Editor Score

100%

Formal writing

Corrections

Spelling

Grammar

Refinements

Clarity

Conciseness

Formality

Inclusiveness

Punctuation Conventions

Resume

Reviewing the Executive Brief – does it meet your goal ?

- Does reading the Executive Brief make it absolutely clear what I want as the writer?
- Did I give the reader a reason to care/engage?
- Have I included unnecessary information that doesn't support my intent/purpose?
- Is the tone right?
- Does the quality of this Brief, in total, represent our quality work?
- How would I react if I was the reader and not the author?
- Is there any way that my writing can be misunderstood or misinterpreted?

Business Writing and Executive Briefs – Pre-Training VC Review

PURPOSE

To provide the VC with an opportunity to review the training package and its delivery prior to Pilot Session #2 for her feedback and approval to roll out the training package.

RECOMMENDATION

The VC resolves to:

1. **Note and provide feedback on the proposed and tested package and**
2. **Approve the roll out of the training with the incorporated feedback**

KEY ISSUES

This training package has been based on the emerging need of the University, interviews with key decision makers and a survey to 25 staff. This feedback has been assembled into a training deck and delivery plan that has been tested in a workshop session with 8 senior staff who are invested in the need being met.

This groups feedback has been very positive and where recommended, changes have been integrated.

The VC will be reviewing the training deck and delivery plan that will be used for the next 2 pilot training sessions.

FINANCIAL IMPACT

This Training has been budgeted for and on track to date.

If a business case is required, has it been endorsed by the Division of Finance? NA ☐ YES ☐ NO ☒

CONSULTATION

Which staff and/or committees have been consulted regarding this proposal? *The author has worked closely with Jo St John and the draft package has also been reviewed by Maria Crisante, Executive Director People and Culture, Amanda Bennett, Dane Haggvold and Rebecca Slattery.*

Was there agreement? NA ☐ YES ☒ NO ☐

If NO, please provide details: *XXX (or N/A)*

RISK ASSESSMENT

Does this matter sit within the current [Risk Appetite](#)? YES ☒ NO ☐

If NO, what are the consequences / risk treatments? *XXX (or N/A)*

ATTACHMENT/S

- A. [Writing Business Reports and Executive Briefs \(PDF File\)](#)
- B. [Nil](#)

Prepared by:
Cleared by (ELT sponsor):

Andrew Mashman, Founder, Liberated Vision
Jo St John, Organisational Development Advisor | Division of People and Culture

**The single biggest
problem in
communication is the
illusion that it has
taken place.**

George Bernard Shaw



**Charles Sturt
University**

Writing Business Reports and Executive Briefs Training 1 17082022



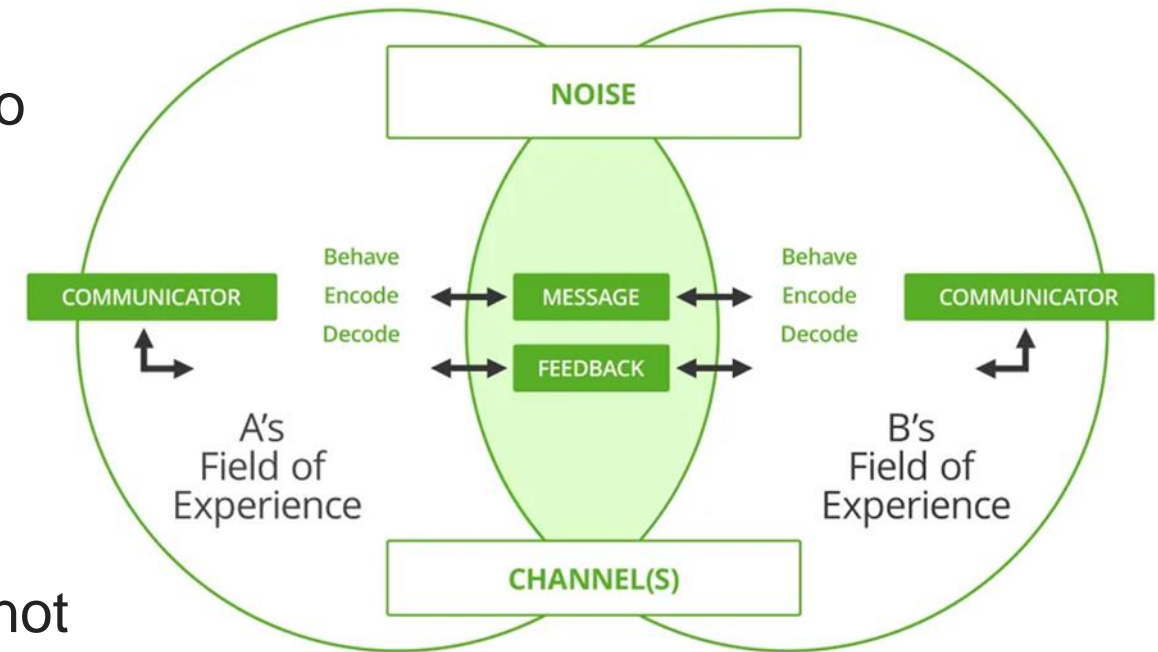
Communication is a University Priority



**Making the
change**

Close the loop – feedback from the survey

- People often write reports and never hear of them again.
- People receive reports and are expected to action them, yet you don't understand any context. Or
- Actioners may not receive original reports and only actions (without context)
- Communication requires feedback
- Socialise ideas and recommendations
- Remember the reader of your report may not be as engaged with your topic as you are!
- Use this model as your diagnostic and to design the best way to share information.



Making it work

Feedback

Key committees will provide feedback to your Executive Briefs on a per brief basis by the Chairperson.

Red Awards

Meeting based Feedback and Red nominations by the chairperson for a change period

Mentor Opportunities

Get to attend a meeting live or virtual to see how reports and executive briefs are received and actioned



Meeting Feedback Example

Committee / Group / Meeting _____ **Chair:** _____ **Date:** _____


Agenda item or Executive brief name / id / (to id who to send feedback to or find the author ?)

This Executive brief was:

Clear - Stars – 1 to 5 

Concise - Stars 1 to 5 

The action required was obvious - Stars 1 to 5 

The Committee/ group / meeting was able to understand the Executive Brief quickly and easily
Stars 1 to 5 

The Committee / group/ meeting like this the most: _____

The Committee / group/ meeting wonders if there is a better way to : _____

Nominate for Red Award: Yes / No

Signed: Chair _____

EO's / PA's / Minute takers could record these and share to authors within 24 hours of the meeting. If not clear Authors can reach out to Chairs for further feedback.

Records could be keep to find role model writers and training opportunities !



Critical things you can work on now



- ✓ Take on an Executive Brief Orientation
- ✓ Personalise and write for the audience
- ✓ Be clear on purpose for the audience
- ✓ Ensure information is distilled to actionable knowledge (Insights)
- ✓ Write recommendations to be followed through by the audience
- ✓ Avoid ambiguous language and jargon
- ✓ Start a fresh format if you inherited cloned reports
- ✓ Edit and Proof read
- ✓ Collaborate more

So What ?

Check list – Moving forward

- ☐ Who am I writing for, who are my stakeholders
- ☐ Where will the brief be seen and used (what would their expectations be (other stakeholders))
- ☐ What are their needs
- ☐ What feedback and evidence do I have (of needs/requirements)?
- ☐ Design - what is the best way to construct this Executive brief ? Structure, collaboration, editing, writing, facilitation
- ☐ Scope the report – what's in and what's out
- ☐ Is there a different way this piece should be approached – workshop, f2f, yarning circle or other – what will meet the needs ?
- ☐ Who are the relevant SME's
- ☐ What's the timeframe, What's the timeframe to draft, What's the timeframe to integrate and edit the (updated) content
- ☐ How will work here drive future efforts? (Recommendations, Actions)
- ☐ Who will present this at Committee? If no-one, should someone ? How can we ensure follow through.

Tomorrow – I will / We will....

What Action will I start now (in my Executive Brief writing and receiving world) for change?

1) _____

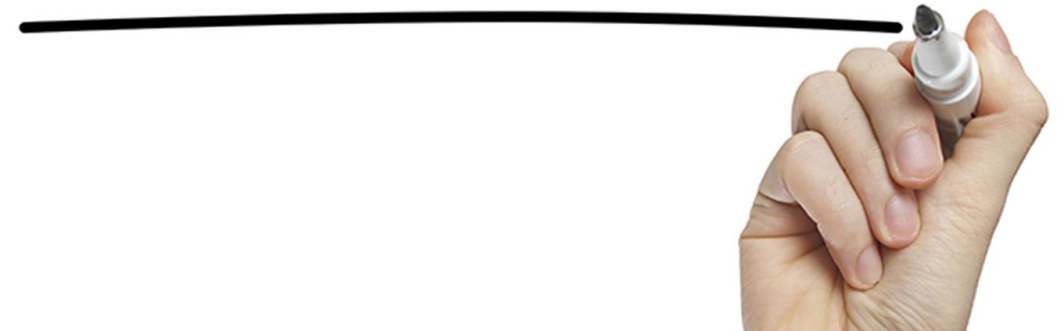
What 2 things will improve my and my colleagues distilling of information to knowledge and insights, that I can start now?

1) _____

2) _____



ACTION PLAN





Go
Make something happen.

THANK YOU!



Please complete our training survey - <https://www.surveymonkey.com/r/G8QXMKS>

We'll appreciate and incorporate your feedback



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Resources

<https://medium.com/@edwardshepard/quit-using-these-30-words-to-improve-your-business-writing-73faf5eb7763>

<https://www.npr.org/sections/13.7/2014/02/03/270680304/this-could-have-been-shorter>

<https://smartblogger.com/filler-words/>

<https://www.grammarly.com/blog/active-vs-passive-voice/>

<https://www.vic.ipaa.org.au/calendar/2021/5/17/writing-briefs-for-decision-makers>

LinkedIn Learning courses to further your knowledge

Writing a Business Report By Judy Steiner-Williams <https://www.linkedin.com/learning/writing-a-business-report?u=2096756>

Business Writing Principles By Judy Steiner-Williams <https://www.linkedin.com/learning/business-writing-principles?u=2096756>

Tips for Better Business Writing By Natasha Terk <https://www.linkedin.com/learning/tips-for-better-business-writing?u=2096756>

Grammar Foundations by Judy Steiner-Williams <https://www.linkedin.com/learning/grammar-foundations?u=2096756>

Grammar Girl's Quick and Dirty Tips for Better Writing by Mignon Fogarty <https://www.linkedin.com/learning/grammar-girl-s-quick-and-dirty-tips-for-better-writing?u=2096756>

Advanced Grammar by Judy Steiner-Williams <https://www.linkedin.com/learning/advanced-grammar?u=2096756>

Editing and Proofreading Made Simple by Erin Rickard <https://www.linkedin.com/learning/editing-and-proofreading-made-simple?u=2096756>

Charles Sturt University Sources

[Home - Office of Governance and Corporate Affairs \(csu.edu.au\)](https://www.csu.edu.au)

[Governance Services - Office of Governance and Corporate Affairs \(csu.edu.au\)](https://www.csu.edu.au)

[Systems and Resources - Office of Governance and Corporate Affairs \(csu.edu.au\)](https://www.csu.edu.au) [University Council and Committees \(csu.edu.au\)](https://www.csu.edu.au)

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More Resources

<https://about.csu.edu.au/our-university/publications-policy/glossary>

<https://www.csu.edu.au/division/vcoffice/ogca/governance/systems-and-resources>

[Charles-Sturt-Editorial-Style-Guide.pdf \(csu.edu.au\)](#)

[Staff resources - Our brand \(csu.edu.au\)](#)

[Corporate templates - Staff \(csu.edu.au\)](#)

[Editing and proofreading - Student Portal \(csu.edu.au\)](#)

[Editing and proofreading - Student Portal \(csu.edu.au\)](#)

[Grammar and spelling - Student Portal \(csu.edu.au\)](#)

[Academic writing - Student Portal \(csu.edu.au\)](#)

[All resources - Student Portal \(csu.edu.au\)](#)



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