ROUTING SLIP // BRIEFING NOTE

Stop Writing Doorstops: Building a Better Briefing

ROLE	NAME	ACTION	DATE	INITIALS
Author	Timothy, Senior Consultant	DRAFTED	03-Feb-26	T ✓
Coord.	Ken, Summit Organizer	COORDINATE	04-Feb-26	K ✓
Coord.	Ken, Summit Organizer	FOLLOW-UP	10-Feb-26	(see me)
APPROVE	Craig, Principal — Lean Agility Inc.	APPROVE	— — —	
QUESTIONS	*The Audience*	*APPENDIX A*	*End of session*	*You*

APPROVED
IN PRINCIPLE

Craig — slides still in progress. Concept approved in principle? — K

Which version is this? v3 or v4?

pls confirm title — 'doorstops' or 'doorstop'? asked twice

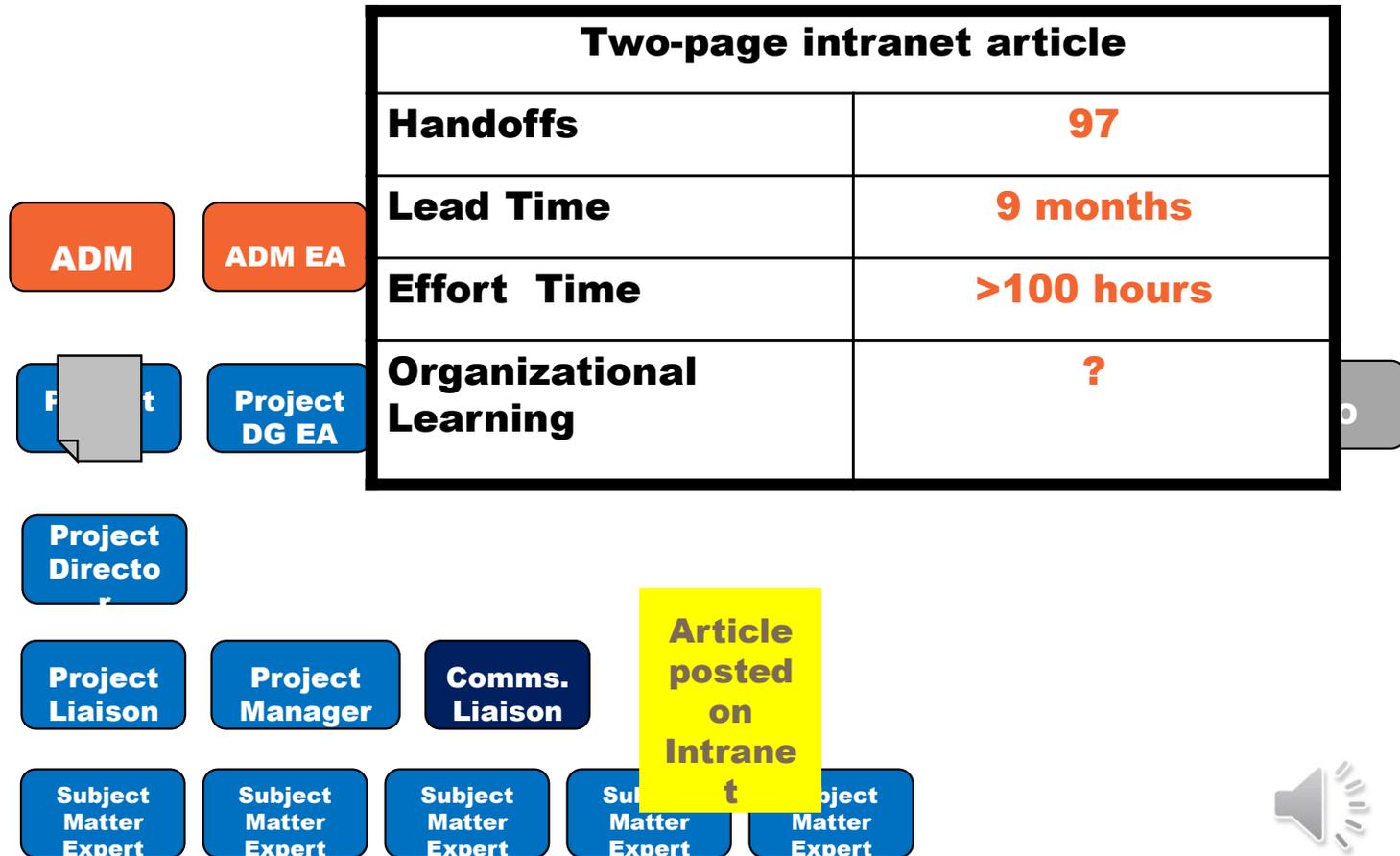Cre **Fall** ing project update (intranet article)

Two-page intranet article	
Handoffs	97
Lead Time	9 months
Effort Time	>100 hours
Organizational Learning	?

ADM

ADM EA

P___t

Project DG EA

Project Director

Project Liaison

Project Manager

Comms. Liaison

Article posted on Intranet

Subject Matter Expert

Subject Matter Expert

Subject Matter Expert

Su___ Matter Expert

___oject Matter Expert

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0. AUTHOR QUALIFICATIONS AND CONFLICT OF INTEREST DISCLOSURE

Timothy (Tim, if brevity be the soul of wit)
Senior Consultant, Lean Agility Inc.

— Lean practitioner — Yellow, Green, and Black Belt

— Consultant to federal, provincial and municipal government organizations, as well as education, not-for-profit and private enterprise

— Certified facilitator of sessions people actually remember (hopefully, fondly…)

— Has written, read, and suffered through a significant number of briefing notes

CONFLICT OF INTEREST DISCLOSURE

The author will later recommend that you hire him. This is disclosed here, in Section 0, for full transparency.
The recommendation appears in Section 7 and is clearly labelled. You may skip it. You will not skip it.

EXEC. EXECUTIVE SUMMARY // READ THIS SLIDE AND YOU HAVE THE ARGUMENT

Briefings overwhelm rather than inform.
This is not news. It is the premise. (did AI write this? Consider making it sound more human)

The conventional fix — fewer layers — is wrong. (*too strong? "could be wrong?"*)
Layers are a symptom. We will show you the disease.

The system produces exactly what it is structured to produce. (*look up source for attribution – Demings? Heath?*)
Want different outputs? Reconfigure the system.

There is a better way.*(that doesn't involve the impossible task of changing the system)*
It involves PDCA, early direction, and trusting the reader.

RECOMMENDED ACTION: Read Section 6 first if you are short on time.

TO: Deputy Minister

FROM: Director General, Strategic Policy and Results

THROUGH: ADM Corporate Services // ADM Policy // Chief of Staff *Refer to Glossary for couplets appropriately heroic to describe these briefing note champions most stoic)*

DATE: 2024-09-03 (revised: 2024-09-17) (re-revised: see attached)

SUBJECT: Improving the Quality and Timeliness of Briefing Notes Across the Organization — Options Analysis — FINAL

EXECUTIVE SUMMARY (1 of 3 pages)

This briefing note provides background, context, analysis, and a preliminary assessment of options relate[...] clarity, timeliness, and organizational impact of briefing notes produced across the department, with ref[...] literature, best practices from comparable jurisdictions, and lessons learned from recent internal audits [...] F)...

47 PAGES SEE APPENDICES

BACKGROUND

Briefing notes have long served as a cornerstone of ministerial and executive communication. The origins of the modern briefing note can be traced to... [3 pages of context follow]

RECOMMENDED ACTION

That the Deputy Minister note the contents of this briefing note and that a working group be struck to examine options.

You have written this document.

You have received this document.

No one read
past page two.

1. BACKGROUND: THE WORLD IS CHANGING. THE BRIEFING NOTE IS NOT. (trite?)

Wernick (2024)

Cabinet has ~100 hours per year for plenary decisions.

→ Every minute of reading time is rationed. The doorstop costs someone a real decision.

Freeland (reported)

"If you want me to read an article, send the article."

→ Not an instruction about length. An instruction about respect for the reader's intelligence.

Donald Savoie / Sutherland

"The poets are largely gone, replaced by people who manage process."

→ The people who wrote well have been replaced by the process that produces badly.

The system is being redesigned to produce fewer briefing notes. It will produce more.

2. THE PROBLEM AS DIAGNOSED // THE CONVENTIONAL WISDOM

The layering argument; a once good and noble process, until:

| Too many reviewers | → | Each one adds a paragraph | → | Document grows | → | Nobody reads it |

The conventional fix: remove layers.

The "evidence":

– Ministers publicly rejecting the format

– Span-of-control reforms explicitly designed to speed decisions by reducing layers

– PCO Clerk calling for less process, not more

The problem with the conventional fix?   layers are a symptom.

3. THE PROBLEM UNDERNEATH // WHAT IS ACTUALLY WRONG

The iceberg — not the tip (disease not symptom? Pain not problem?)

3.1   **No one agreed what the document was for.** *before anyone typed a word.*

3.2   **The decision-maker was consulted last.** *And only after six rounds of revision.*

3.3   **Contributors worked from different assumptions.** *and nobody called a meeting about it.*

3.4   **Review happened too late.** *on a document already long gone in a wrong direction.*

The system is perfectly structured to produce exactly what it produces

3. ANALYSIS: RETHINKING REVIEW // THE THESIS ANALOGY

THE CURRENT ASSUMPTION

Review = inspection.

A reviewer is catching defects in a finished product.

Later review = "quality control"

Reasonable conclusion: fewer reviewers = faster, better documents.

VS.

A BETTER ASSUMPTION

Review = co-creation.

A thesis advisor (for example) isn't catching defects -

They are participating in the emergence of something that couldn't exist without them.

Reasonable conclusion: consult the right people at the right time and clarify upfront who is responsible for what

4. CASE STUDY: A MINISTERIAL CORRESPONDENCE PROCESS

KEY FINDINGS

100 days (>280 days worst case)

elapsed time, receipt to dispatch — for routine correspondence
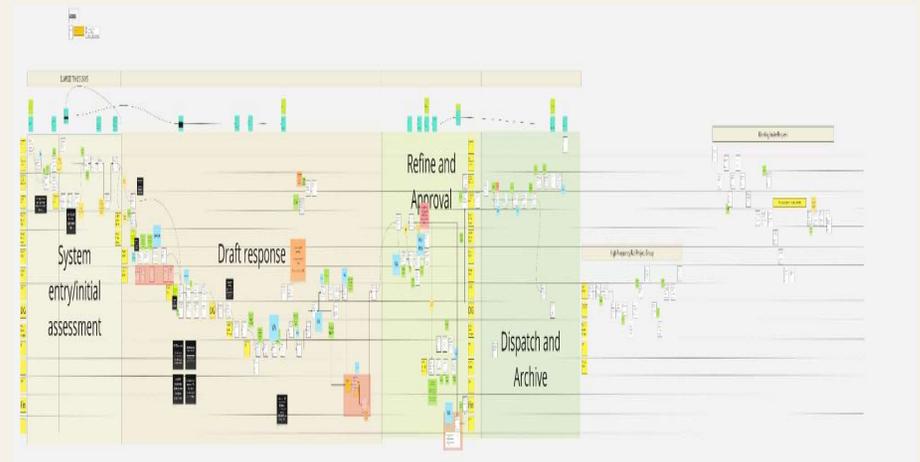
17+

distinct reviewer roles involved at various stages

90–95%

of reviewers checked grammar and cohesion

< 20%

proactively checked: is the question being answered?

CURRENT STATE VALUE STREAM MAP

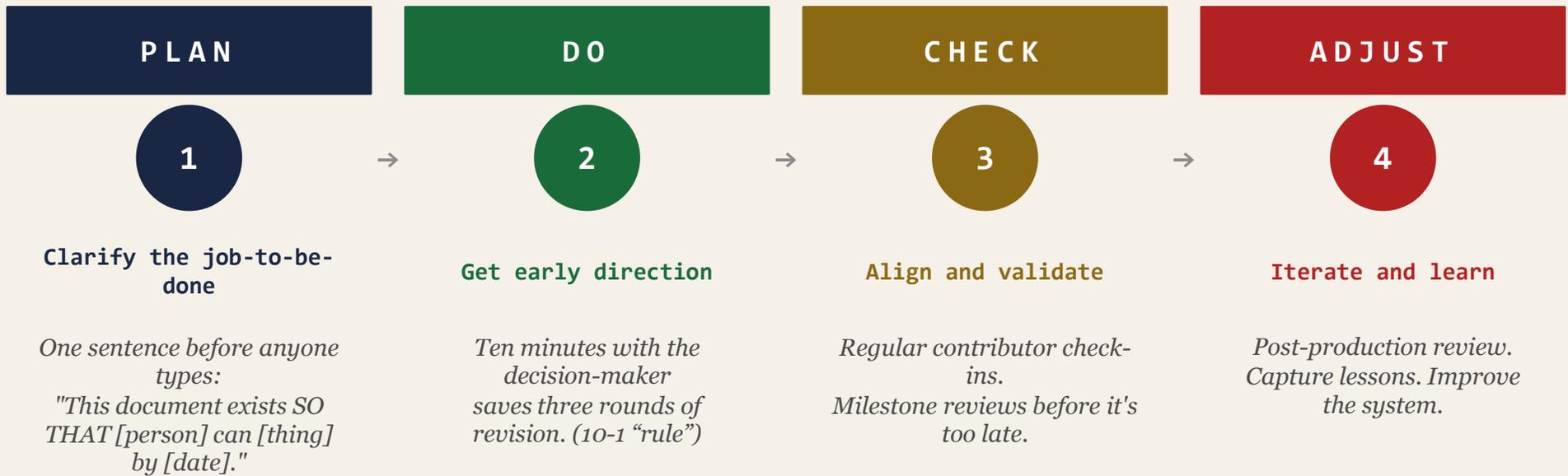System entry → Draft response → Refine & Approval → Dispatch

#1 upstream cause:

processes are unclear (who does what, when, and for what purpose)

#1 downstream effect:

administrative burden (what everyone complained about)

5. PROPOSED SOLUTION: THE PDCA BRIEFING CYCLE

PLAN	DO	CHECK	ADJUST
1	**2**	**3**	**4**

PLAN → **DO** → **CHECK** → **ADJUST**

Clarify the job-to-be-done

One sentence before anyone types:
"This document exists SO THAT [person] can [thing] by [date]."

Get early direction

Ten minutes with the decision-maker saves three rounds of revision. (10-1 "rule")

Align and validate

Regular contributor check-ins.
Milestone reviews before it's too late.

Iterate and learn

Post-production review. Capture lessons. Improve the system.

This is not a new process! It is probably how briefing note process started before we transformed it into a doorstop production process.

+ Post-production review: capture lessons. Feed them back into PLAN.

6. RECOMMENDATIONS // WHAT YOU CAN DO MONDAY

It is recommended that the audience:

a) **Before writing begins — define the job.**
One sentence. "This document exists SO THAT [person] can [thing] by [date]."
If you cannot write this sentence, you are not ready to write the document.

b) **Before drafting — get early direction.**
Ten minutes with the decision-maker.
Ask: what do you already know? What would change your mind? What format works for you?

c) **During drafting — check in. Don't surprise people.**
A brief alignment touchpoint with contributors costs 20 minutes.
A late-stage rewrite costs three days.

These three actions cost nothing. They will feel / are surprisingly radical.

7. NEXT STEPS // WHEN TO CALL FOR HELP

7.1 YOU CAN DO THIS NOW

✓ Define the job-to-be-done (before writing)

✓ Get early direction from the decision-maker

✓ Alignment check at critical junctures

✓ Conduct a post-production review on your next briefing

✓ Share this framework with your team

7.2 THE HARDER PART

Who owns the briefing process?

Somebody has to – let's fix it together.

What does 'good' look like here, specifically?

Generic templates don't survive contact with reality.

How do you sustain improvement under pressure?

When the ADM needs it by 4pm, the system reverts. Let's lock in the improvements and keep improving.

The people side.

People are complicated. Change is optional until it isn't.

For 7.1: you have everything you need.   **For 7.2:** *we have done this before.* *I will send you a 47-page proposal. jkjkjkjk*

BRIEFING NOTE // ONE PAGE // FOR DECISION

Improving Briefing Note Quality — Recommended Approach

ONE PAGE

TO: Decision-Maker

FROM: Author

DATE: Today

ACTION: Approve the approach in Section 3

RECOMMENDED ACTION

That the decision-maker approve the PDCA briefing cycle approach for piloting in Q1 / tomorrow, beginning with the next ministerial correspondence / briefing note cycle.

ISSUE

Response times exceed 100 days. Most reviewers check grammar; few check whether the question is being answered. The problem is upstream: no clarity on the job-to-be-done before writing begins.

PROPOSED APPROACH

Apply PDCA: clarify the job → get early direction → align contributors → validate at milestones → review and improve. Pilot on next correspondence cycle. Review in 30 days.

Same topic. Same ask. One page. Written using the principles in Section 5.

ROUTING: Author → Decision-Maker   3 names. One date. Done.

5b. THIS IS LEAN***: THE BRIEFING NOTE EDITION

VOICE OF THE CUSTOMER

Define value from the client perspective — not the approver's (or anyone else's! – Job of the Milkshake!)

"This document exists **SO THAT** [person] can [thing] by [date]."
Write that sentence first. If you can't, stop.

PDCA

Plan → Do → Check → Adjust. Iterate toward the target condition. (Marshmallow Challenge!)

Early direction (Plan) → draft (Do) → milestone review (Check) → revise (Adjust) → post-production review (learn).

FLOW EFFICIENCY

Eliminate waiting. Move work through the system without queues. (Modig Efficiency Paradox – Little's Law)

10-minute review huddle with all reviewers simultaneously.
Not 10 weeks of sequential sign-offs, each one a queue.

PULL VS. PUSH

Produce when there is demand — not when the producer is ready (Subway v Buffet!)

Brief written when the decision-maker needs it, shaped by what they need to decide (consider Kingman equation)

RESPECT FOR PEOPLE

Respect the time, intelligence, and judgment of everyone in the system.

The doorstop disrespects the reader, the writer, and every reviewer in the chain.
A one-pager says: I valued your time enough to think first. (Trust equation!)

KAIZEN

Continuous improvement. Every cycle is an opportunity to learn. (Marshmallow Challenge!)

Post-production review: What worked? What didn't? What changes for next time?
Feed lessons back into the PLAN stage.
The briefing process improves (CI, Retro)

*****AI sounding footnote with Modig reference: This was always Lean and maybe we should revise and pepper Modigisms throughout?*

Lean Document Creation Course

Reach out to chat: timothy@leanagility.com

Q&A

The floor is open.

Ask the good ones first - Time is rationed.

Glossary of Terms Unfamiliar

Briefing Note *is not a memo, friend —*

it's much longer, denser, and achieves no end.

The **Deputy Minister (CEO)** *runs the show,*

while Ministers, elected, take credit for the flow.

"Note the Contents" *is the action we commend —*

it means: do nothing, but look pleased 'twas penned.

An Assistant Deputy Minister, ADM, is a job quite thankless

Note to self, find something that means VP and rhymes with thankless

A Docket *is a package, thick with dread,*

of documents no minister has e'er read.

Treasury Board *approves what you would spend,*

But always asks for further study in the end.

PROTECTED B or SECRET *means for specific classes —*

**It means someone, somewhere, is covering their…
bases.**