

# Writing at Amazon Work Sheet

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## Introduction

From an operating perspective, Amazon believes in the detailed narrative rather than PowerPoint. The narrative form creates a structure in which ideas can be communicated and discussed clearly, with precision and detail and can stand on their own. It leaves far less to interpretation and spin and places a higher demand and discipline on the author to clearly communicate the full context, take a position and provide the rationale behind decisions/recommendations.

The key to good writing is simple thoughts simply expressed. Use short sentences and short words. Anything which is confused, complicated, poorly written or capable of being misunderstood risks losing the audience. *"Writing is the entire process by which we discover what we are trying to say"* (Patrick E. McLean)

*"Full Sentences are harder to write. They have verbs. The Paragraphs have topic sentences. There is no way to write a six-page, narratively structured memo and not have clear thinking"* (Jeff Bezos)

*"The skill of writing is creating a context in which other people can think"* (Edwin Schlossberg)

## Writing Mechanics

### Simple Things

Get your spelling and grammar right. These things matter. They ensure that nothing distracts the reader from your ideas and that you do not undermine your credibility. Ensure that your document identifies the author and has the date, page number, and Amazon Confidential (or Privileged and Confidential if required<sup>1</sup>) in the footer. Pay attention to the formatting and check that it remains clear if printed in black and white, especially if you have charts.

### Structure and Form

Have a clear purpose and structure your narrative accordingly. Is the document a decision point, a status update, a deep dive into a particular aspect of a project or program, or something else? What are the key questions you are trying to answer and what, if anything, are you asking for? For example, if you want approval for building a new service, include the press release, customer need, market opportunity, business case, risks, and an estimate of the effort, proposed timeline, resources required, and FAQ.

Whatever the structure, always state the objective in the first paragraph, end with a recommendation, and identify the next steps. If you have appendices, they should be as well written as the rest of the document as they will be read. When presenting, have additional supporting data available for reference e.g. the data one level below the appendices; this is referred to as your back pocket.

Beyond the structure of the narrative, you should also know what form you need your document to conform to. The six-pager is common at Amazon, having at most a six-page narrative (which often starts with the relevant principles and tenets), an optional FAQ, and an optional set of appendices. Other common forms are a one-pager<sup>2</sup> and the press release and FAQ<sup>3</sup>.

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<sup>1</sup> If you do not know when this is required, watch *Communicating the Amazon Way* by Melissa Kirmayer (see Appendix 4).

<sup>2</sup> See <https://w.amazon.com/index.php/WritingOnePaggers>

<sup>3</sup> See [https://w.amazon.com/index.php/Press\\_release](https://w.amazon.com/index.php/Press_release), <https://w.amazon.com/index.php/WorkingBackwards>, and [https://w.amazon.com/index.php/Working\\_Backwards\\_Training](https://w.amazon.com/index.php/Working_Backwards_Training)

## Be Concise

Be a ruthless editor. As Roy Peter Clark says in *Writing Tools*: “Cut big, then small. Prune the large limbs before shaking out the dead leaves”. For every paragraph and sentence that remains, ask yourself why your reader cares and how it clarifies your reasoning.

*“Vigorous writing is concise. A sentence should contain no unnecessary words, a paragraph no unnecessary sentences, for the same reason a drawing should contain no unnecessary lines and a machine no unnecessary parts. This requires not that the writer makes all his sentences short, or that he avoid all detail and treat his subjects only in outline, but that every word tell.” (Strunk and White)*

*“Use words like you are paying for each one.” (Patrick E. McLean)*

## Make the Paragraph the Unit of Composition

Every paragraph should be indivisible and have a single clear topic. Start each paragraph with a topic sentence; followed by sentences that explain, support, or build on the topic; and close with a sentence that emphasizes the topic or explains the consequences.

## Use the Active Voice

Voice describes how a verb relates to the subject of a sentence. In the active voice, the subject acts on the object of the sentence (“*Jill hit Jack*”) and there is always both a subject and an object i.e. the verb must be transitive. In the passive voice, the subject is acted upon (“*Jack was hit by Jill*”) and the object is optional (“*Jack was hit*”). The passive voice can be useful, as in the example where Jack's assailant is unknown, but your writing will have more energy if you prefer the active voice and use the passive judiciously.

Prefer “*We found page load time impacted conversion...*” to “*It has become apparent that conversion has been impacted by page load time...*” and “*We will reduce latency by...*” over “*A program of improvements will be implemented to reduce latency*”.

*“The active voice is more direct, more authoritative, and more concise.” (Strunk and White)*

## Use Simple Words and be Specific

Generalizations lead to weak statements that lack clarity. In contrast, specific statements made with simple words are clear and powerful.

*“Prefer ‘It rained every day for a week’ to ‘A period of unfavorable weather set in’” (Strunk and White).*

*“No matter what you are talking about, the less specific you are the more it will sound like bullshit.” (Patrick E. McLean)*

## Remove Weasel Words

Weasel words relating to timing and quantity weaken statements and include: should, might, could, often, generally, usually, probably, significant, better, worse, soon, some, most, fewer, faster, slower, higher, lower, many, few, and more. Replace these words with data or a statement of intent. Prefer “*This will affect 23% of sellers*” to “*A significant proportion of sellers may be affected*”, and “*We will increase operating margin by 260bps*” over “*Implementing [...] should result in a higher operating margin*”.

*“If every sentence you write admits a doubt, your writing will lack authority.” (Strunk and White).*

## Remove Adverbs and Adjectives

Badly used adverbs are empty filler. The sentences “We will completely resolve the issue” and “This will clearly improve the customer experience” are both shorter and stronger without the adverbs. In literature,

adverbs are useful when modifying the meaning of a verb (“she smiled sadly”), but in business writing, this usage is not needed. If you do find an adverb necessary, consider using a better verb. Prefer “Conversion fell by 150bps...” to “Conversion rapidly reduced by 150bps...”. For similar reasons, adjectives are also the enemy of clarity and brevity.

*“I believe the road to hell is paved with adverbs” (Stephen King)<sup>4</sup>*

*“If you catch an adjective, kill it.” (Mark Twain)<sup>5</sup>*

### Use Positive Statements in Place of Negative Ones

Positive statements are more powerful and less hesitant. Reserve the use of 'not' for denial or antithesis, never as a form of evasion. Prefer “*This is a poor use of resources*” to “*This is not the best use of resources*” and “*The data is inconclusive*” over “*The data does not conclusively show ...*”.

When “not” is used for antithesis (i.e. contrasting negative and positive) it provides a powerful structure: “*We are customer obsessed, not customer driven*”.

## Content

### Write for the Reader

Do not write for yourself. Consider who will read the document and ask yourself: What do they know? What matters to them? What is the context they bring? If you are asking for a decision, will the content help them make that decision, or distract from it?

When you are reviewing, set aside your domain knowledge and see if the document stands on its own. If possible, find an editor from outside your area to help with this.

### Open Well

As John Rauser notes in his article *Thoughts on Writing*<sup>6</sup>: “*Your opening sentence has to be perfect. Your opening paragraph has to be great. You can afford a sloppy sentence midway through – people might not even notice – but not at the beginning. So, spend an inordinate amount of time crafting your opening. It should be clear, tight, and grammatically correct. Anything less is unacceptable.*”

Example: “I want to present a new service and get approval for a pilot. I’ll need to show customer need, market opportunity and business case, risks, and an estimate of effort, timeline, and resources required.”

### Structure the Material to Achieve Your Goals

State the purpose of your doc at the beginning, what you will and will not cover, and be clear at the beginning of each section what it is you’re presenting. If you need to present a lot of details to support your case, consider appendices. Also, consider what conversations you do and do not want to have. Your meeting could start late and you don’t have time for rat holes. If you don’t want to talk about it, don’t include it in the doc. This is not about hiding anything; it’s about planning your time. Example: “Overall in 2009, NewAWSService is expected to drive \$X Million in revenue and achieve adoption of Y%. Please see Appendix A for a full financial model.”

Some questions to ask: Is there enough background material and detail, or too much? Is your content focused, or will it send you down rat holes? Are the themes of your argument clearly identified? Is each

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<sup>4</sup> King, Stephen. *On Writing: A Memoir of the Craft*. 10<sup>th</sup> anniversary ed. (Scribner, 2010)

<sup>5</sup> Twain, Mark. Letter to Bowser, D. W. 1880

<sup>6</sup> Rauser, John. *Thoughts on Writing*. 2009.

[https://blogs.amazon.com/the\\_fractionating\\_column/archive/2009/06/thoughts-on-writing.html](https://blogs.amazon.com/the_fractionating_column/archive/2009/06/thoughts-on-writing.html)

section complete and does each section build on the last? Do the conclusions follow from the data and arguments presented? Is the data objective? Are you proposing solutions or just problems?

### Make your Reasoning Clear

Lay out the story. Break your story into sections. Go painfully far in teasing apart what's really going on, separating each element, describing each element clearly and separately, and logically flowing from one element to the next ("At a high level, NextFeature allows users to do X. Specifically, first they do A, then they do B, then C. This allows their end users to experience D").

Get the data to support your case. The bigger the request the more solid the supporting data needs to be. Restrict estimates to discussions of the future and if estimating, ask yourself whether the figure adds value. Common anti-patterns include making the reader work to understand how the data supports the arguments and presenting data without analysis or conclusions.

Make sure each section can stand on its own and is complete. As you review each section ask yourself: Do I believe this? What argument or data point is missing? Is there room for debate on this point? Think hard about the most obvious questions and objections and bake info relevant to that into the doc. Build your case as you go. Make sure each section builds on the last leading up to your conclusion. Litmus test: are you convinced? If you don't buy your own story, certainly nobody else will.

### Present recommendations, not just problems

Clearly, state your recommendation. If the goal of your doc is to present a decision point, make a recommendation. While there are gray areas, you should have an opinion of what you'd do and be able to explain/defend it. Example: "Should we expose an 800# for support? Strong arguments either way, but I propose not doing so for x, y, z reasons."

### Use data and judgment

Support your assertions with data. If you say "we should do x" follow it immediately with "because of Y and Z." Make sure you're confident in the data you're presenting! (If you think your data has holes, but has value and is still useful, you'd better point out the holes, yourself, than have someone else do it to you during the discussion). Where you are relying upon judgment because the necessary data isn't available state this and the thinking that leads you to your conclusion.

### Consider your audience and anticipate

Read each sentence and ask what questions it will raise: Do I believe this? What argument or data is missing? Is there room for debate on this point? Above all, ensure you are convinced by the arguments presented. Stephanie Landry suggested the following: *"For each document, make a list of ten questions that a reader might ask. Answer them. Determine if those questions should be answered in the text, or handled verbally. Revise and repeat."*

A lack of specificity raises questions: What value was delivered? Why do we care? What was the impact and was it material? Prefer *"Operating profit for the TTM to June 26, 2012, increased \$230MM (13%) YOY"* to *"Operating profits improved during 2012"*, and *"On June 23, 18% of requests failed between 8:32 am and 12:43 pm"* over *"A period of higher than normal errors occurred at the end of June"*.

### Wording: choose wisely

Use simple, clean, clear language. According to the Encyclopedia Britannica, the English Language has over a half a million words. Be careful which ones you choose. There is a significant difference between a "manifesto" and a "white paper". Choosing the wrong word (in a narrative or in a discussion) can lead the

conversation away from your point. Ask yourself, is this word the right word? Can I back up the use of this word (for instance “many”) with data? If so use the data. Avoid using superlatives.

### Make Metrics Precise

Provide an absolute baseline when using relative metrics e.g., “*We increased operating margin by 240bps from 26.0% to 28.4%*”. If you are giving examples, provide the context e.g. “*We impacted one hundred teams including [...] and [...]*”.

### Use Charts Wisely

Ask yourself whether a chart is the best way to present the data. Will a chart communicate what you want, or invite irrelevant questions? As an alternative, consider a statement of what the values for the key metrics were before and after or put the data in a table.

If you use a chart, it should stand-alone. Include a title, label the axes, provide units, and use a legend if there is more than one data series. Do not use pie charts as the data is always better presented as a bar chart; humans are good at comparing lengths, but not angles and areas. Do not use 3D as perspective distorts the information. Lastly, know your data; people will look for outliers and you should know where they come from.

### 6 pages means 6 pages

Amazon narratives are 6 page Word docs, not PowerPoint decks. If you think a diagram is useful, by all means, include it, but your doc should be a story (not an outline with bullet points). Do stick to 6pp. plus appendices (as many as you need). Anything under 10 pt. the font is cheating, and if your margins are denominated in fractions of an inch or mm, you’re probably pushing it. If you need more than 6 pages, you’re probably saying too much. As T.S. Eliot said, “If I had more time I’d have written a shorter letter.”

### Use your back pocket

Your appendix should include data that is needed to support your narrative. You should expect your audience to read your appendix. Separate from your appendix make sure you’ve got an amply filled but not distributed “back pocket.” This is the “I- don’t-think-we’ll-go-there, but-just-in-case-we-do” file. Bring relevant financials analysis, technical data, and customer data— essentially anything that might be needed. And make sure you know what’s in it. Example: You’re presenting an operational review for your new product. Your doc will summarize test results (pass/fail, key limitations, etc.), and maybe extract some key data in the appendices. In your back pocket, you should have a full list (or encyclopedic memory) of every test you ran, test specs (load, environments, etc.) their numerical results, the issues you found and addressed.

### Details matter: leave enough time to edit, edit, edit

Phrasing, spelling, and grammar matter. A chef could cook a great meal, but if it looks terrible on the plate, people won’t eat it. This is the easy stuff – don’t just rely on spell check (“two” and “too” are both words, after all). Read your own doc several times. Start generally to get the content right, then read again for flow and clarity, finally a pass for spelling and grammar. After you’ve re-read and re-written it twenty times your eyes may not pick up on errors. At that point, you should either read it aloud or ask someone else to proofread it. Better yet, save some fresh eyes who know your target audience and get them to do a final read-through or two.

### Don’t go alone

Consider who’s going to be in your meeting. Who might have interesting insights or helpful suggestions that can make the document stronger? As a rule, you probably don’t want anything in your doc to come as a surprise to your manager. Also, consider who else should be on board before you take this up the chain. The last thing you want to have happened is to have someone in the audience say, “I know nothing about

this and can't support it." On the other hand, if you know there are people who are skeptical of your initiative it could be very valuable to include their perspective in your doc and them in the meeting. That way if your initiative moves forward, they will be more able to disagree and commit.

## Presenting the Document

### *Run the Meeting*

Sure, you can send around the doc in advance, but don't expect that all (or anyone) will have read it by the time the meeting comes around. Bring printed copies of your document for all attendees. When all are in the room, you set the agenda and expectations: purpose of the meeting, and how you want to run it (e.g. "Meeting today is about X. Please read the doc and then let's talk through Y and Z. The goal for today is to have a decision for each before we're done").

The group will spend the first 20-25 minutes reading quietly after which time the discussion begins. Don't talk while your audience is reading.

### *Listen, Understand, Answer, and then Educate if Necessary*

If someone asks you the wrong question, answer the question that was asked and then tells them why it is the wrong question; asking clarifying questions before answering is fine. If you do this the other way around and start with why the question is wrong and what the question should have been, you will sound like you are avoiding the question i.e. like a politician.

If the question is who, give a name. If the question is when give a date. If you cannot answer a question, say so, and say when you will provide an answer.

### *Admit Mistakes*

Do this freely. Making a mistake is fine, we are agile, we run lean, and mistakes will happen. What matters is that you learn from it and make a systemic change so that you do not make the same mistake again.

### *When you are in a Hole Stop Digging*

If someone publicly criticizes you, consider whether there is any truth in the statement and whether to defend yourself. If you disagree speak up, but think carefully about whether you want to keep digging.

### *Take Criticism as an Opportunity to Learn*

Our leaders are passionate and their feedback can feel more personal than it is. We are all continuously striving to improve and this is what motivates the criticism. Take notes and try not to process everything in the meeting. Review your notes the next day and analyze them with a clearer mind.

### *Next Steps*

This introduction presents the foundations of a set of skills that require concerted effort and diligence to hone. To build on what has been presented ask your team for examples of good six-page narratives for your area, read documents from outside your organization, use the resources in Appendix 4, and most importantly practice: write, review, re-write, get feedback, rewrite, review, and enjoy the process of discovering, clarifying, and refining your ideas.

# Appendices

## Appendix 1: Style and Writing Guidelines

### General Writing Tips:

#### The Basics

- Do not describe things as good or bad. Keep things neutral and let your audience decide.
- Be positive.
- Just because you know what DPMO means, and that the people you work with know what it means, it doesn't follow that the majority of your audience know. Assume nothing.
- Any group of people working together or in the same field is likely to develop specialized, shared vocabulary. Don't become so familiar with jargon that it is at odds with the aim of being understood clearly. So, the obvious advice is: avoid jargon.
- Simplicity is the key to understanding. Short words in short sentences present your audience with the fewest obstacles to comprehension. In many cases, there are longer, more decorative alternatives but think twice before you use them.
- Avoid the use of 'we' and 'our'. For example, instead of 'we implemented an improvement program', write 'an improvement program was implemented'.
- Vogue words. Nothing is banned, but you should approach them with care (leading edge, ecosystem, and synergy).
- Have you explained any metrics that are not a standard part of our metrics package?
- Do not put negative numbers in brackets. Explain their value by saying 'decreased', 'less than plan', 'lower', 'deteriorated' etc.
- Keep the audience interested. Start with the exciting part of your project, and that usually is the result! Lay out the vision, or what we want to do. Why is it good?
- Don't get too bogged down with the financial. It's easy to forget that we are doing all of this for the customer and to serve a strategy. The narrative is the time to think about the 'why' and the 'how'.

### Formatting:

- Keep it short – no document should be more than six pages long excluding the Appendix
- Font: Calibri 11
- Page: Letter (8.5 x 11) with margins set to narrow
- Spell check: American English
- Paragraph: Justified alignment
- Line spacing: 1
- Header: name of the document and the date
- Footer: Amazon.com confidential - page X of X - V1
- Two spaces after a full stop (to set Word up to check the spacing between sentences automatically - File – Options – Proofing – Grammar Settings – then change required spaces between sentences to 2).



## Other Tips

### *Abbreviations*

Do not use punctuation or spaces in abbreviations: YOY, GMV, ORY1. Spell out abbreviations when first used. Consider not using acronyms that appear only once or twice in the document, as their initial expansion clutters the text.

### *Apostrophes*

Plural nouns that have no 's' (e.g. children) take an apostrophe and 's' in the possessive (children's games, gentlemen's outfitter). Plural nouns ending with a 's' take only an apostrophe in the possessive (dogs' tails, sellers' accounts). Singular nouns take an apostrophe and 's' in the possessive (dog's tail, seller's account). Contrast the meaning of the seller's accounts (one seller with many accounts) and the sellers' accounts (many sellers with many accounts). Names ending in 's' normally takes an apostrophe followed by a second 's' (Jones's, James's), but use pronunciation as a guide.

### *Appendix*

Plural appendices. Appendices should read Appendix 1, Appendix 2 and so on.

### *Brackets*

If the sentence is logically and grammatically complete without the information contained within the parentheses (round brackets), the punctuation stays outside the brackets. (A complete sentence that stands alone in parentheses starts with a capital letter and ends with a full stop.)

### *Capital Expenditure*

Abbreviate to CAPEX; do not expand on first use

### *Capitals*

See the Chicago Manual of Style for general guidelines. The following are Amazon specific:

Jobs – all lower case – associate, senior operations manager, executive assistant

Amazon projects – title case – Project Late Dinner, Project Sunshine

Amazon terminology – lower case – pick, stow, allocation workbench, prime

### *Contractions*

Do not use contractions. Prefer "do not" to "don't", "cannot" to "can't", etc.

### *Currencies*

Abbreviate currencies using the appropriate symbol: \$50, €50, £50. Not 50 euros or E50.

### *Data*

Treat the word data as either a mass noun ("The data is compelling"), or a count noun ("These data are compelling"). Both usages are acceptable, but you must choose one and be consistent in how you use it.

### *Dates*

January 1, or January 1 2010 (no commas) when in a narrative, YYYY-MM-DD if written numerically (ISO 8601)

### *Financial years*

2004-2005

### *First*

Second, third – spell out up to ninth, then 10<sup>th</sup>, 21<sup>st</sup>, millionth.

### *Firstly, secondly*

Prefer first, second, etc.

### *Font Size*

The main text should be 11 points or more. Footnotes should be 10 points or more.

### *Foreign exchange*

Abbreviate to FX; do not expand on first use.

### *Fractions*

Two-thirds, three-quarters, but two and a half.

### *Margins*

Margins must be half an inch (0.5") or more

### *Measurements*

Cubic feet: cu. ft.; square feet: sq. ft.; cubic meters: cu. meter

### *Meters*

Write the word meters out in full to avoid confusion with million. In square measurement, land is given in sq. meters and sq. km. Floor areas of buildings are expressed as sq. meters or sq. ft.

### *Million*

Use MM for sums of money and units (€10MM, 45MM page views), but million for people (a population of ten million).

### *Numbers*

For numbers other than decimals and percentages (see Percent), spell out one to ninety-nine (which



covers one hundred); use integers from 101 to 999; and then 1K, 1MM, 1B.

Thousands ( $10^3$ ): 12.3K; Millions ( $10^6$ ): 7.5MM; Billions ( $10^9$ ): 3.2B

Use the US decimal format: 7,123,456.78

#### *Operational Expenditure*

Abbreviate to OPEX; do not expand on first use

#### *Oxford Comma (also Harvard, or serial comma)*

As preferred by the Chicago Manual of Style and Strunk and White's *The Elements of Style*, use a comma before the coordinating conjunction (usually and, or, or nor) at the end of a series of three or more terms: "*Italy, France, and Spain.*"

#### *Percent*

Abbreviate to % and always use numerals: 2%.

#### *Percentage rises*

An increase from 3% to 5% is a 200bps increase, not a 2% increase; a 2% increase on 3% would be 6bps and take the value from 3% to 3.06%.

#### *Re/re*

Use re-(with hyphen) when followed by the vowels e or u: e.g. re-entry, re-examine. Use re (no hyphen) when followed by the vowels a, i, o or u, or any consonant: e.g. rearm, rearrange, reiterate, reorder. The exceptions are: re-read; or where confusion with another word would arise: re-cover/recover, re-form/reform, re-creation/recreation.

#### *Risks and opportunities*

Abbreviate to R&O; do not expand on first use.

#### *Sales and operations planning*

Abbreviate to S&OP; do not expand on first use.

#### *Seasons*

Spring, summer, autumn, winter – all lower case.

#### *Senior*

Abbreviate to Sr., not Sen. or Snr.

#### *Spaces After Periods*

Only use one space after a period (full stop).

#### *Times*

1 am, 6.30pm

#### *Versus*

Abbreviate to vs.; do not expand on first use.

#### *Week*

Abbreviate to WK17, or WK45-47 if bridged.

#### *Week-over-week*

Abbreviate to WOW; do not expand on first use.

#### *Year*

Write as '2010', not 'the year 2010'. For a span of years use a hyphen: 2004-05 not 2004/5.

#### *Year-to-date*

Abbreviate as YTD; do not expand on first use.

#### *Year-over-year*

Abbreviate as YOY; do not expand on first use

## Appendix 2: Example Document Structures

### Press Release

In a press release, the following are paragraphs topics, not section headings.

- Heading - Short description of the product, feature, or service being launched.
- Sub-Heading - Describe in a single sentence who the primary customer is and the benefit they get.
- First Sentence - Start with the customer and the benefit you will provide. For example, 'Amazon customers can now...' Don't start with Amazon. Poor Example: 'Amazon.com launches yada yada feature'.
- First paragraph - The summary of what it is. The first paragraph should assume the person will not read the entire press release. So make it count!
- Second paragraph - Paint a vivid picture of the problem or the opportunity. Even better if you can make a case for the urgency.
- Third paragraph - Blow away the audience with your vision for how we'll solve their problem or offer a unique opportunity.
- Fourth paragraph - Quote an Amazon leader – Position the product and capture the "one" most important value provided to the customer. And have a conversation with the Amazon leader you quote-- it's a great way to get their take on the value.
- Fifth paragraph - Describe how easy it is to get started. Motivate the reader to 'try out' the product. This helps you start to think about how a customer will find your product or engage your program.
- Sixth paragraph - Customer testimonial – Reinforce the value of why a customer cares by imagining what you want your customer to say or feel. The testimonial is the heart and soul of a press release.
- Seventh paragraph - Closing and direct reader to a link and an email address that provides additional product details for further reading.

### Correction of Errors (COE)

This structure is for reference, but use the COE tool for recording COEs:

- A brief description of what went wrong.
- Customer/business impact caused by the problem.
- Detail analysis on root cause of the problem.
- Metrics and Graphs.
- Security implications, if any found.
- Lessons learned
- Corrective actions
- Action items
- Related items (Trouble Tickets, SIM etc)

### OP1

Your organization will have its own OP1 template, but here is an example:

- Introduction
- {current year} Financial Results and {next year} Financial Plan
- Progress Against {current year} Strategic Goals
- Key {next year} Initiatives
- Q&A
- Appendices
  - Multi-year P&L (Units/GMS, revenue, VM)
  - Headcount Summary
  - Top Five SMART goals for {next year}
  - FAQ

### Appendix 3: Narrative Best Practices Checklist

- ☐ Clear purpose
- ☐ Data that describes the problem or current situation
- ☐ Recommended solution or next steps
- ☐ Data that supports your recommendation
- ☐ Concise writing style, with no descriptors or vague wording
- ☐ Visually clean; easy to read
- ☐ Addresses potential concerns or questions
- ☐ No longer than 6 pages
- ☐ Include supporting data in appendices
- ☐ Reviewed by others

### Acknowledgement

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