

Executive Brief Creation Task

Purpose

Create concise, high-impact executive briefs that distill comprehensive research into decision-ready formats for senior leadership and stakeholders.

Inputs

- Comprehensive research reports
- Strategic insights and analysis
- SWOT analysis results
- Recommendations and priorities
- Supporting data and evidence
- Executive brief template

Process

1. Content Review and Prioritization

Review Source Materials:

- Read comprehensive research reports
- Review strategic insights
- Understand recommendations
- Identify key data points
- Note critical findings

Prioritize Information:

- Identify most critical insights
- Determine key messages
- Select essential data points
- Prioritize recommendations
- Focus on decision-relevant information

Audience Analysis:

- Understand executive audience
- Identify decision-making needs
- Determine appropriate detail level
- Consider time constraints
- Assess prior knowledge

2. Key Message Development

Identify Core Messages:

- What's the situation?
- What did we learn?
- What does it mean?

- What should we do?
- What's the impact?

Message Hierarchy:

- Primary message (most important)
- Supporting messages (2-3 key points)
- Evidence and data (selective)
- Call to action (clear next steps)

Message Testing:

- Is it clear and concise?
- Is it relevant to audience?
- Is it supported by evidence?
- Is it actionable?
- Does it drive decisions?

3. Executive Summary Writing

Opening Statement (1-2 sentences):

- Situation overview
- Context and background
- Why this matters

Key Findings (3-5 bullet points):

- Most critical discoveries
- Surprising insights
- Strategic implications
- Competitive context
- Market dynamics

Primary Insight (1-2 sentences):

- Core strategic insight
- What it means
- Why it's significant

Main Recommendation (1-2 sentences):

- Primary recommended action
- Rationale
- Expected outcome

Impact Statement (1-2 sentences):

- Expected business impact
- Strategic implications
- Urgency or timeline

4. Key Findings Section

Structure Each Finding:

- Finding statement (bold, 1 sentence)
- Supporting data (1-2 key metrics)
- Implication (1 sentence)
- Visual element (chart or comparison)

Selection Criteria:

- Strategic significance
- Decision relevance
- Surprise or novelty
- Actionability
- Evidence strength

Presentation Format:

- Scannable bullet points
- Bold key phrases
- Selective data points
- Small supporting visuals
- Clear implications

5. Strategic Recommendations Section**Recommendation Structure:**

- Recommendation statement (bold, 1 sentence)
- Rationale (2-3 sentences)
- Expected outcome (1 sentence)
- Priority indicator (high/medium/low)

Prioritization:

- Rank by strategic impact
- Consider feasibility
- Assess urgency
- Evaluate resource requirements
- Determine dependencies

Action Orientation:

- Specific and concrete
- Clearly defined
- Assignable
- Measurable
- Time-bound

6. Next Steps and Priorities**Immediate Actions** (next 30 days):

- 3-5 specific actions
- Clear ownership
- Defined deliverables
- Success criteria

Short-term Priorities (next 90 days):

- Key initiatives
- Resource requirements
- Milestones
- Dependencies

Long-term Initiatives (6-12 months):

- Strategic programs
- Capability development

- Investment needs
- Expected outcomes

Timeline Visualization:

- Gantt chart or timeline
- Key milestones
- Dependencies
- Critical path

7. Visual Design and Layout

Page 1: Executive Summary:

- Clean, uncluttered layout
- Clear visual hierarchy
- Scannable format
- Key information highlighted
- Professional appearance

Page 2: Key Findings:

- Findings with supporting visuals
- Data charts or comparisons
- Competitive context
- Trend indicators
- Clear implications

Page 3: Recommendations:

- Prioritized recommendations
- Strategic framework visual
- Impact/feasibility matrix
- Resource requirements
- Implementation considerations

Page 4: Next Steps:

- Timeline or roadmap
- Action items with owners
- Success metrics
- Resource needs
- Decision points

8. Data Visualization

Chart Selection:

- Bar charts for comparisons
- Line charts for trends
- Pie charts for composition
- Scatter plots for relationships
- Maps for geographic data

Design Principles:

- Simplify complex data
- Highlight key insights
- Use color strategically

- Clear labels and legends
- Provide context and benchmarks

Visual Consistency:

- Consistent color palette
- Uniform chart styles
- Professional appearance
- Brand alignment
- High quality graphics

9. Writing and Editing

Writing Style:

- **Concise:** Every word counts
- **Active voice:** Strong, direct
- **Present tense:** Immediate relevance
- **Specific:** Concrete facts and figures
- **Action-oriented:** Focus on decisions
- **Jargon-free:** Clear, accessible

Editing Process:

- Cut unnecessary words
- Strengthen weak phrases
- Clarify ambiguous statements
- Verify all facts and figures
- Check consistency
- Proofread meticulously

Formatting:

- Bold key phrases and numbers
- Use bullet points for scannability
- Include white space
- Clear headers and subheaders
- Consistent styling
- Professional appearance

10. Quality Assurance

Content Quality:

- [] Leads with key conclusions
- [] Focuses on most critical information
- [] Includes specific recommendations
- [] Provides clear next steps
- [] Highlights business impact
- [] Supported by data and evidence
- [] Free of jargon and complexity
- [] Appropriate for audience level

Structure Quality:

- [] Logical flow and organization
- [] Clear sections and headers
- [] Effective use of bullet points
- [] Appropriate length (2-4 pages)

- [] Scannable and easy to navigate
- [] Visual hierarchy clear

Visual Quality:

- [] Professional appearance
- [] Consistent branding and style
- [] Effective data visualizations
- [] Appropriate use of color
- [] Clear and readable fonts
- [] Adequate white space
- [] High-quality graphics

Communication Quality:

- [] Clear and concise writing
- [] Active voice throughout
- [] Specific and concrete
- [] Action-oriented language
- [] Free of errors
- [] Appropriate tone
- [] Compelling narrative

11. Alternative Formats

One-Pager Creation:

- Distill to single page
- Most critical information only
- Highly visual and scannable
- Clear hierarchy
- Decision-focused

Presentation Deck:

- 10-15 slides
- One key message per slide
- Visual storytelling
- Supporting data
- Clear narrative flow

Executive Dashboard:

- Key metrics display
- Visual indicators
- Trend charts
- Comparison data
- At-a-glance comprehension

12. Review and Approval

Internal Review:

- Fact-check all data
- Verify recommendations
- Validate priorities
- Check formatting
- Proofread thoroughly

Stakeholder Review:

- Share with key stakeholders
- Incorporate feedback
- Validate messaging
- Confirm accuracy
- Obtain approvals

Final Preparation:

- Make final edits
- Update version number
- Prepare distribution copies
- Create presentation version
- Archive source materials

Executive Brief Templates

Standard Executive Brief (2-4 pages)

Page 1: Executive Summary

EXECUTIVE SUMMARY

Situation: [2-3 sentence overview]

Key Findings:

- [Finding 1 with key data point]
- [Finding 2 with key data point]
- [Finding 3 with key data point]
- [Finding 4 with key data point]

Primary Insight: [1-2 sentence strategic insight]

Recommendation: [1-2 sentence primary recommendation]

Impact: [1-2 sentence expected impact]

Page 2: Key Findings

KEY FINDINGS

1. [Finding Title]
[Supporting data and context]
[Visual: Chart or comparison]
Implication: [Strategic implication]
2. [Finding Title]
[Supporting data and context]
[Visual: Chart or comparison]
Implication: [Strategic implication]
3. [Finding Title]
[Supporting data and context]
[Visual: Chart or comparison]
Implication: [Strategic implication]

Page 3: Strategic Recommendations

STRATEGIC RECOMMENDATIONS

1. [Recommendation Title] [Priority: High]
Rationale: [Why this recommendation]
 Expected Outcome: [What will result]
2. [Recommendation Title] [Priority: High]
Rationale: [Why this recommendation]
 Expected Outcome: [What will result]
3. [Recommendation Title] [Priority: Medium]
Rationale: [Why this recommendation]
 Expected Outcome: [What will result]

[Visual: Impact/Feasibility Matrix]

Page 4: Next Steps & Timeline

NEXT STEPS & PRIORITIES

Immediate Actions (Next 30 Days):

- ☐ [Action 1] - Owner: [Name]
- ☐ [Action 2] - Owner: [Name]
- ☐ [Action 3] - Owner: [Name]

Short-term Priorities (Next 90 Days):

- ☐ [Priority 1]
- ☐ [Priority 2]
- ☐ [Priority 3]

Long-term Initiatives (6-12 Months):

- ☐ [Initiative 1]
- ☐ [Initiative 2]

[Visual: Timeline or Roadmap]

Resource Requirements: [Summary]

Success Metrics: [Key KPIs]

One-Pager Template

```
[TITLE]
[Date] | Prepared for: [Audience]

EXECUTIVE SUMMARY (25% of page)
[2-3 sentence situation]
[1 sentence key insight]
[1 sentence primary recommendation]

KEY FINDINGS (35% of page)
• [Finding 1] - [Key data point]
• [Finding 2] - [Key data point]
• [Finding 3] - [Key data point]
[Small visual: Chart or comparison]

RECOMMENDATIONS (25% of page)
1. [Recommendation 1] [Priority indicator]
   [Brief rationale]
2. [Recommendation 2] [Priority indicator]
   [Brief rationale]
3. [Recommendation 3] [Priority indicator]
   [Brief rationale]

NEXT STEPS (15% of page)
• [Action 1] - [Timeline]
• [Action 2] - [Timeline]
• [Action 3] - [Timeline]
```

Quality Standards

Content Standards

- Lead with conclusions
- Focus on decision-relevant information
- Include specific recommendations
- Provide clear next steps
- Highlight business impact
- Support with selective data
- Eliminate jargon
- Match audience level

Structure Standards

- Logical organization
- Clear visual hierarchy
- Scannable format
- Appropriate length
- Easy navigation
- Effective transitions

Visual Standards

- Professional appearance
- Consistent branding

- Effective visualizations
- Strategic use of color
- Readable typography
- Adequate white space
- High-quality graphics

Communication Standards

- Clear and concise
- Active voice
- Specific and concrete
- Action-oriented
- Error-free
- Appropriate tone
- Compelling narrative

Outputs

- Executive brief (2-4 pages)
- One-pager (optional)
- Presentation deck (optional)
- Executive dashboard (optional)
- Supporting appendices (if needed)

Success Criteria

- Brief is concise and focused
- Key messages clear and compelling
- Recommendations specific and actionable
- Next steps clearly defined
- Professional presentation quality
- Appropriate for executive audience
- Drives decision-making

Related

- @agent:executive-brief-agent
- @template:executive-brief-tmpl
- @template:one-pager-tmpl
- @task:report-synthesis
- @task:insight-generation
- @checklist:executive-brief-checklist

Best Practices

- Start with the most important information
- Use inverted pyramid structure

- Limit to 2-4 pages maximum
- Make every word count
- Use visuals to replace text
- Highlight numbers and key facts
- Make recommendations specific
- Include clear next steps
- Ensure professional design
- Proofread meticulously
- Test readability
- Tailor to audience
- Focus on business impact
- Provide supporting detail in appendices
- Use consistent branding