**Executive Analysis Brief Framework & Examples**

**Commissioning Better Analysis From Your Teams**

**The Executive Brief Framework**

**Template Structure:**

**Business Context:** [Why this analysis matters now]

**Strategic Question:** [The specific decision this analysis should support]

**Decision Timeline:** [When you need preliminary insights and final recommendations]

**Success Criteria:** [What a successful analysis should deliver]

**Analysis Boundaries:** [What to include and exclude]

**Resource Authorization:** [Team members, budget, external resources if needed]

**Example 1: Poor Executive Brief**

**"The Vague Request"**

**Subject:** Need Analysis on Our Performance

**Brief:** "Hi team, can you pull together some analysis on how we're doing across the divisions? I need to present something to the board next month about our strategic progress. Please include relevant metrics and charts. Let me know if you have questions."

**Problems with This Brief:**

* ❌ No clear business context or strategic purpose
* ❌ Undefined success criteria or specific decisions
* ❌ Vague timeline without consideration for decision needs
* ❌ No boundaries - could result in overwhelming analysis
* ❌ No connection to strategic objectives or priorities

**Predictable Results:**

* Generic dashboard with dozens of metrics
* No clear strategic insights or recommendations
* Analysis that raises more questions than it answers
* Last-minute scramble to extract strategic meaning

**Example 2: Excellent Executive Brief**

**"Strategic Resource Allocation Analysis"**

**Subject:** Q4 2024 Resource Allocation Analysis for Board Strategic Review

**Business Context:** Grace Kennedy's board will review our 2025 resource allocation strategy at the December meeting. We need to determine optimal investment distribution across divisions given our 2026 growth targets and current market dynamics. The analysis will inform $50M in strategic investment decisions.

**Strategic Question:** Which Grace Kennedy divisions should receive increased investment to maximize our probability of achieving 2026 revenue targets ($2.1B) and profitability goals (16% EBITDA margin), considering competitive positioning and market growth rates?

**Decision Timeline:**

* November 15: Preliminary insights for leadership team strategic discussion
* November 30: Complete analysis with investment scenarios for board materials
* December 5: Final recommendations for board presentation

**Success Criteria:** Your analysis should rank divisions by investment priority with supporting rationale, quantify expected returns for each investment scenario, assess competitive risks, and provide clear criteria for monitoring success/failure of investment decisions.

**Analysis Boundaries:** Focus on strategic growth investments (market expansion, capability building, acquisitions). Exclude operational efficiency projects and regulatory compliance investments - those are separate analyses. Include competitive intelligence where available but don't delay analysis for comprehensive competitive data.

**Resource Authorization:**

* Strategic Analysis Team (lead)
* Division CFOs for data validation
* External market research budget up to $25K if needed
* Priority access to division leadership for interviews

**Example 3: Excellent Executive Brief**

**"Market Expansion Opportunity Assessment"**

**Subject:** Trinidad Market Expansion Decision Support Analysis

**Business Context:** Grace Kennedy's Food Division has reached dominant position in Jamaica (28% market share) but faces slowing growth in our core market. We're considering significant expansion into Trinidad where we currently hold 12% share. This decision will impact our 2025-2027 strategic plan and requires $12M investment commitment.

**Strategic Question:** Should Grace Kennedy commit to aggressive Trinidad market expansion, and if so, what investment level and timeline would optimize our risk-adjusted returns while building sustainable competitive advantage?

**Decision Timeline:**

* October 20: Initial feasibility assessment for leadership team review
* November 5: Complete investment scenarios and risk analysis
* November 15: Final recommendation with implementation plan for board approval

**Success Criteria:** Analysis should provide clear investment recommendation with expected ROI, timeline to break-even, competitive response scenarios, resource requirements, and success/failure metrics. Include three investment scenarios: conservative ($6M), recommended ($12M), and aggressive ($18M).

**Analysis Boundaries:** Focus on Food Division expansion only - don't analyze Financial Services or International division opportunities. Include regulatory environment and supply chain implications. Exclude detailed operational execution planning - that comes after strategic approval.

**Resource Authorization:**

* Strategic Analysis Team + one external market research firm
* Trinidad market research budget $40K
* Access to Food Division leadership team
* Competitive intelligence from external sources

**Practice Exercise: Write Your Own Executive Brief**

**Your Task:**

Write an executive brief for analysis you actually need this quarter using the framework above.

**Common Scenarios for Practice:**

**Option 1: Digital Transformation Investment**

* Context: Evaluating technology investments for competitive advantage
* Decision: Which digital initiatives should receive priority funding
* Timeline: Current quarter planning cycle

**Option 2: Acquisition Opportunity Assessment**

* Context: Potential acquisition target in adjacent market
* Decision: Whether to proceed with due diligence and what price range
* Timeline: Competitive bidding process with tight deadlines

**Option 3: Division Performance Turnaround**

* Context: One division underperforming strategic targets
* Decision: Turnaround strategy vs. divestiture consideration
* Timeline: Next board cycle for strategic review

**Self-Assessment Questions:**

1. **Clarity Test:** Could someone unfamiliar with your business understand what decision you're trying to make?
2. **Boundary Test:** Is it clear what analysis should be included and excluded?
3. **Action Test:** Will this analysis directly support a specific strategic decision?
4. **Timeline Test:** Do your deadlines align with actual decision-making needs?

**Before vs. After: Brief Quality Comparison**

**Before: Typical Executive Requests**

* "Show me how Marketing is performing"
* "I need some analysis on our competitive position"
* "Put together a presentation about division performance"
* "Can you look into our customer satisfaction scores?"

**After: Strategic Executive Briefs**

* "Analyze Marketing ROI by channel to optimize our $2M Q4 spend allocation"
* "Assess competitive threats to determine our defensive strategy priorities"
* "Rank divisions by strategic investment priority for 2025 resource allocation"
* "Evaluate customer satisfaction drivers to prioritize our service improvement investments"

**The Impact of Better Briefs**

**What Changes for Your Team:**

* **Strategic Focus:** Teams think about business implications, not just analytical techniques
* **Efficiency:** Clear boundaries prevent analysis paralysis and scope creep
* **Relevance:** Analysis directly supports decisions rather than providing general information
* **Confidence:** Teams understand success criteria and can self-assess their work

**What Changes for You:**

* **Time Savings:** Less time spent clarifying requirements and redirecting analysis
* **Better Decisions:** Analysis designed to support specific choices rather than general understanding
* **Strategic Dialogue:** Discussions focus on implications and actions rather than methodology
* **Team Development:** Your team learns to think like strategic business partners

**Organizational Impact:**

* **Analytical Maturity:** Your organization develops sophisticated analytical capabilities
* **Decision Speed:** Strategic decisions backed by relevant analysis happen faster
* **Resource Efficiency:** Analytical resources focused on high-impact strategic questions
* **Competitive Advantage:** Better analysis leads to better strategic decisions

**Key Principle:** The quality of your analysis starts with the quality of your brief. Executives who brief strategic questions receive strategic analysis. Those who brief operational questions receive operational reports.