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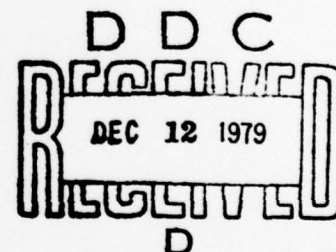
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HOW TO BRIEF ON RESEARCH: AN ESSAY FOR RESEARCHERS

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OFFICE OF THE TECHNICAL DIRECTOR

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HOW TO BRIEF ON RESEARCH: AN ESSAY FOR RESEARCHERS

INTRODUCTION

This essay was generated by the anxiety of an evening before a major briefing. It was merely another briefing in what seems at times to be a life-time of briefings. But this time I had freshly experienced a depressing variety of "Hot and Cold" reactions to my topic. I had been pushed toward more detail and less ... to be non-technical and yet to answer questions of technique ... to provide hard answers but to keep the big picture in mind.

Out of this mess of conflicting demands came a moment of insight. I was being asked to do something that really could not be done. No wonder, I said to myself, that briefings have always been such tension-laden affairs.

Yet, I have been told that I am pretty good on the briefing floor. Somehow the briefings always seem to work out OK. I must be doing something right, I thought, but it would be good to put this tension to rest. So I wrote this essay for the possible benefit of others plagued by briefing anxiety. I do not know if it will help those others. I do know that it served me very well.

People versus Research People

People want it simpler than it is ... and shorter ... and pleasing to their views.

People are not accustomed to grounding their views in data. They all know the word "science" but they often equate it with their own concept of "authority."

Researchers are not often understood. Researchers seek and rather enjoy trying to ground their views in the authority of data and in methods for collecting and analyzing data. Researchers do not trust their own natural opinions, but go through amazingly complicated tire-some "drills" to check them out.

So a researcher is easily seen by lay-people as a kind of nut ... removed from the world of common sense ... or as a simple authority--one who knows everything about something.

In either case you are a great target!

The Common Sense Game versus The Research Game

In briefings, the more you play your own game, the more hits they score in their game.

It is their commonsense score card that counts because you are giving the briefing for the purpose of getting something from them. What you are after may be as lofty as their use of some good thing that all the world needs ... or as mundane as job security ... or as silly as a stroke to reassure yourself that you are not really all alone in your business. But, face it, you are after something when you give a briefing.

So stop playing your game. Play their game. But do it smart. Use your knowledge of both games. If you do, you should never--or rarely--lose. A draw is not a loss.

Psychology of Briefing - From Both Sides of the Viewgraph Machine

1. Deal in generalities. Treat your hard-earned operational definitions as a trade secret. When you use one, don't bother to tell anyone you are doing so. It is not that these people cannot understand or could not understand; they simply have not been trained or prepared to appreciate operational definitions. They will not be pleased to be told how to avoid sloppy general ideas. If you try to push scientific definitions, you will find yourself treated like someone announcing that dollar bills are now worthless.
2. Don't be bitter because they do not seem interested in the better ways of thinking you've so painfully mastered and managed to apply in your project. Most of the people out there are not so masochistic. If you push your better ways, they will either fail to get the message ... or conclude that you are trying to sell something ... or if they really catch on, they will hate you. After all they did not come to the briefing to have their ways of thinking overhauled. They simply expect some information in the terms they are used to, in terms they understand.
3. "Communicate" is merely an imperative. Your desire to communicate will not do it. Your most carefully developed plan with script and charts all "dummmied-down" will not do it. They may at best be the stimulus to it. You know from your own game that nothing exists unless you rig up some way to observe it happening. The sound of your own voice and a smiling or gently nodding audience is not evidence ... nor are a few polite questions. A well-planned string of generalities and simple figures is necessary, but it is not communication. So what is? Did you ask? Do you want to know how to know or if there is communication?
4. Communication is (a) when you ask a question bearing on anything I have said and (b) I ask you if I understand the question right by rephrasing it until you say I do understand the question and (c) I then try to give you some kind of answer and (d) you say something to indicate that you got it or disagree or you're puzzled, to which (e) I might reply with gratitude for your question or a question of my own ... (f) and so on, ad infinitum. However, everybody knows that time is

valuable ... there are other people present ... and other questions ... and besides, it's almost lunch time. So this process does not ordinarily happen.

5. The time you leave for questions and discussion is the most valuable time in the briefing. It is when you can communicate. The "Show" time is only the preparation for communication. This point is so important and so hard to practice that it requires repetition and elaboration.

6. Repeat the important ideas. For example, NEVER use all your allotted time giving your pitch. If you fall for the ten-minute-briefing-in-ten-minutes trap, you lose!. You will not have a chance to hear what questions you have aroused in the people. And ... horror of horrors! ... you will be contributing to the deterioration of most everybody.

7. Use more than one example to broaden the important ideas. Do this to give people more ways of locking on from their own varied and unknown-in-detail-to-you ideas. You know your frame of reference is different from that of your audience. You understand their frame of reference, but only in a general way. You must go fishing for the details.

8. Beware of efficiency.

For example, you know how you have felt when you have attended meetings where speaker after speaker got up and said his programmed pitch while the chairman or boss type kept looking at his watch to make sure every damned thing got said by everybody with important things to say. When that meeting started you found yourself with questions you wanted to ask. But soon you saw that people who asked questions had slowed the proceedings, whereupon the chairman got itchier and speakers got cut short, so they spoke faster about more with less time for questions. And the meeting ground on and on, getting worse as it went. But finally having caught up his schedule, the chairman announces that everyone has had a highly productive meeting because so much was covered. Lord, it was cost effective! Then you were really happy to go to lunch. Lunch turns out to be a long one when people get sufficiently smashed to endure the next round of efficiently planned monologues. The boredom of those afternoons has been so great for me at times that I was happy to see the company wise-ass deliberately intrude on the well-planned schedule.

But note that all the above is merely an example of an example, double-barrelled to provide a grapeshot of ways for you to ride along with these general ideas.

9. Put it all together. Pull your net of examples and related ideas together so your listeners have it all in one neat little bundle. For example, I have talked here from points 4 to 8 about time ... our concern for it ... how we get trapped into wasting it individually and collectively in well-meaning ways ... and how we all suffer this problem ... deterioration of most everybody. Now, please let me pull in this string and cap it off. Highly efficient briefings tend toward boredom! We get bored in spite of ourselves. We get bored with things we even want

to hear about. That's why we know there is waste. We do not get what we want from the time spent because we are bored by monologues. Finally, if you get irritated like me ... instead of going into a trance like some happier people ... time is wasted with anger. We don't think too well when angry, and that's a waste. But it starts with boredom built on efficiency.

10. Plan for communication time. Be really hard-nosed and even sneaky about refusing to contribute to waste in the name of efficiency. No matter what time you are given, don't use more than half of it talking. Cut your topic to the bone and cut the bone in half the long way if you must, but do not become another 45-RPM record in the organizational stack.

11. Vary examples, but stay with your theme. Change the pace when you think you've nailed down a point fairly well. For example, never talk about numbers or show anyone numbers unless they ask for them. I know that sounds outrageous--or overdrawn--but it is the best advice I ever gave myself.

12. Give very little hard data. Laymen don't mind a few really innocent numbers scattered about ... as in TV commercial "science" ... but they are no more comfortable with numbers than with operational definitions of other kinds. In fact, they are less so. Sprinkle numbers very lightly around general ideas. Use just enough to let them know the numbers are back there somewhere. But don't lay them out before the group unless someone asks a question which ... on careful inquiry and confirmation ... really requires you to say "Well, perhaps, this table from our report will help out with that question." Then calmly riffle through your viewgraphs of back-up stuff making comments that might help when you finally find it and get it up there.

13. The briefing is no substitute for the report. Get that detailed table off of the screen as soon as you can! Don't try to explain the whole thing ... however much you love it! Point to the few items which bear on the question. Sell your report softly by saying it's the kind of thing that must be taken in context, the context of your report ... where you finally thought it through. Then get on to the next question from someone else which will often be more general and less concerned with numbers.

14. Number lovers are rare. Take it as a statistical truth that number people are a minority ... often despised. The only time to stay with numbers is if the man holding the main score-card is a number man. But even here, let him ask for those tables. You will save yourself the risk of explaining what the big man already knows, not to mention giving him lots of ways to shoot you down if that is his game. Force nit-pickers to read your report and do any fighting at the level of your report.

15. Summarize comments by others. Treat the discussion as part of the briefing by paraphrasing what people say. Acknowledge comments and mentally keep track of questions and answers. At the end of the

briefing ... meaning end of the question and answer session ... bring it all together with some summary comments about the discussion as part of the briefing. This may sound hard to do but if you are really listening to the others (not merely looking to see how you are being received) you will know you have learned something from them. Close by telling them what you have learned and thanking them for their contribution to your effort.

16. Describe the potential uses of results as implications, potentials or options. Avoid recommendations for action by other individuals or organizations. Research yields ideas, information and techniques. Sometimes these "products" can be used by others. Sometimes they should be used, but that decision is not the research business. The decision to use something requires changing established ways (a loss in some way) and doing something new (a cost in some way) and being responsible for actions and the consequences. Unless the researcher has weighed all that and has responsibility for action and consequences--requests for recommendations should be refused. People do not usually know they are putting the burden or responsibility for action on you when they ask for recommendations. They do it naturally because that's what authorities are good for--and, of course, to blame when things go wrong.

So, How Did the Briefing Go?

This question almost always draws a positive response if only to say that a necessary evil has been accomplished.

This question like any other admits many interpretations. My experience following the drafting of this essay was positive in several ways. First, I had less anxiety about the whole briefing process than ever before. Second, I learned a lot from the people present. I had several pages of notes and it was possible to produce a summary statement.

I called this a major briefing because a general officer was present. Closing the briefing with a paraphrase of the General's views and getting the General's concurrence was a practical triumph.

Third, people went away with copies of the draft report and showed signs of being interested enough to read it. Many people had expressed personal viewpoints. Many questions had been handled by discussions among those present.

Since this essay is for researchers, I close with suggestions for further research. It may be that any value in these ideas is not so much in knowing them or reading them. I suspect that much of what I have said here is not new to researchers who have struggled with briefing anxiety. It may be that writing down one's thoughts before the briefing along these lines is the important thing ... a kind of personal brain-washing before the big event.

Finally, note that these ideas may be totally irrelevant to some researchers who do not suffer briefing anxiety. But then such researchers would have little to say to those of us who do. Doubtless, they are few in number and they have not read this far.