



DEPARTMENT OF THE NAVY
NAVAL EDUCATION AND TRAINING PROFESSIONAL
DEVELOPMENT AND TECHNOLOGY CENTER
6490 SAUFLEY FIELD ROAD
PENSACOLA, FLORIDA 32509-5237

IN REPLY REFER TO:

NETPDTCINST 5216.3B

011

12 FEB 2003

NETPDTC INSTRUCTION 5216.3B

Subj: **PROCEDURES FOR PREPARING BRIEFING SHEETS, POINT PAPERS, TALKING PAPERS, AND EFFECTIVE CONDUCT OF FORMAL BRIEFINGS**

Encl: (1) Briefing Sheet Format
(2) Point Paper Format
(3) Talking Paper Format
(4) Briefing Guidelines

1. **Purpose.** This instruction establishes NETPDTC command policy regarding the preparation of Briefing Sheets, Point Papers, Talking Papers, and for the effective conduct and guidelines for Formal Briefings.

2. **Cancellation.** NETPDTCINST 5216.3A

3. **Definitions**

a. Briefing Sheets (NETPDTC 5216/4 (11-01)) will accompany letters and other correspondence. They provide a precise executive summary of the purpose, background, and impact or conclusion regarding the correspondence. Additionally, they specifically request action or signatures.

b. Point papers provide information on a particular subject. They may or may not have recommendations or require a decision. Point papers may be solicited, submitted in response to a question or in preparation for a meeting; or unsolicited, designed to provide information on a current topic.

c. Talking papers are prepared to give pertinent points on a subject about which the speaker is familiar. The purpose of the talking paper is to state the issue and all related points in a precise format to use in discussing the subject.

d. Briefings are conducted to provide information of a particular subject. They should be concise and to the point. The information presented should enable the viewer to become familiar with the subject. A briefing is not intended to make

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the viewer an expert. It is, however, intended to provide pertinent information so that an informed decision can be made.

4. Preparation

a. Papers and briefings must be accurate, concise, and current. Each will be fully coordinated with appropriate personnel contributing to or concerned with its content. The information should be arranged so that essential material may be extracted in a glance. Although coverage must be as complete as possible, it should not be so detailed that significant points are lost. A substantial degree of standardization is both possible and desirable, and adherence to certain basic rules for preparation will greatly improve the usefulness of these papers and briefings.

b. The format of enclosures (1) through (4) will satisfy most subjects, but there may be minor modifications in format to accommodate variations in subject matter, or the nature of the information to be presented. Except in readily apparent cases, such as statistical tabulations or graphs, every reasonable attempt should be made to adhere to the standardized format. However, some latitude in material used is desired when providing a briefing. The medium used should enhance the presentation of the subject material. Adherence to the standardized format aids the user since they can expect to find related material in the same general location with common titles, regardless of the source or the subject of the paper. In a tab, which is part of a paper, there is considerably more latitude in format and content. Simple rules that apply across all formats are:

- (1) Limit use of multiple font styles and sizes
- (2) Use no more than two colors (except where graphs or tabular material is used)
- (3) Minimize use of legends for notes or other minutia

c. The optimum point paper consists of one page upon which all significant information is displayed. Although brevity is essential in these papers, it must not be achieved at the expense of clarity. Eliminate all needless words and phrases. If necessary for brevity, phrases and clauses may be used in lieu of complete sentences, provided the thought to be conveyed is clear. Detailed discussion, statistical tabulation, lengthy chronology, history or rationale, where necessary should be appended as a tab.

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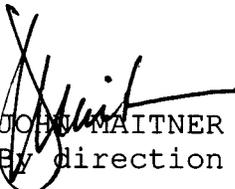
d. Abbreviations and acronyms may be used freely as long as they are either very well known or introduced by spelling out the word or phrase upon initial use followed by the abbreviation or acronym in parenthesis. Thereafter, the abbreviation or acronym may be used. Unusual technical terms, phrases, code names, or equipment identification must be clearly defined or explained since the reader may not be as completely familiar with a subject as the author.

e. Titles, paragraphs, indentation, and other clerical matters should approximate the format of enclosures (1) through (3). Footnotes may be used but they must be concise, keeping in mind that a one-page paper is the objective. If the explanation is lengthy, it is preferable to state "See Tab ___" and include the explanation in the tab.

f. For point papers and talking papers, the rank or title, name, office code, and telephone extension of the person preparing the point paper and the date of preparation will appear in the upper right-hand corner of each page.

g. All tabs to a basic point paper must be listed alphabetically in the lower left-hand corner of the first page, as shown in the enclosures.

5. **Action.** Department Directors and Special Assistants will ensure briefing papers, point papers, talking papers, and formal briefings prepared by their departments follow these guidelines.


JOHN MAITNER
By direction

Distribution: (NETPDTCINST 5216.1F)
Lists I, IA and II

Web Access: MAIN INDEX
<https://pennd09.cnet.navy.mil/netpdtc/directives.nsf>

NETPDTC BRIEF SHEET

NETPDTCINST 5216.3B

Append to all written presentations made to OO or O1. Use formal language. Continue on reverse only if necessary. **12 FEB 2003**

PURPOSE: Just as in any instruction or notice, the first statement should succinctly and properly state the purpose of the principal document. For example:

Purpose. Provide response to your question "Where do we go from here?"

or

Purpose. Provide material for your discussions with _____.

BACKGROUND: This is optional for short papers, but essential for more lengthy ones. It should state succinctly what decisions or recommendations are based upon. For example:

Background: All functional departments have been contacted and their schedules will permit this meeting.

or

Background: Key Points are:

- First Point
- Second Point
- Third Point

CONCLUSIONS AND RECOMMENDATIONS: This portion should recapitulate the conclusions or recommendations of the accompanying material. For example:

Conclusion. The project is on time and under budget. We foresee no future problems. We will keep you posted of the progress.

or

Recommendation. Request XO sign the correspondence.

PRECEDENCE	SIGNATURE	FOR INFORMATION OF			
<input type="checkbox"/> Priority	<input type="checkbox"/> CO	<input type="checkbox"/> Read Tabs			
<input type="checkbox"/> Urgent	<input checked="" type="checkbox"/> XO	<input checked="" type="checkbox"/> Read Basic Correspondence			
<input checked="" type="checkbox"/> Routine	<input type="checkbox"/> DH	<input type="checkbox"/> Read (other) _____			
Prepared by Joe Sailor	Date 06/29/02	Ext. 2-1001 x1734	Forwarded by Jim Civilian	Date 06/30/02	Ext. 2-1001 x1733

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POINT PAPERS

- 1. This enclosure provides information to assist in the preparation of point papers.
- 2. Point papers provide information in response to a tasking or to introduce information.
- 3. The format of point papers will be as follows:

Rank, Name, Service
 Code, Telephone Extension
 Date of Preparation

TITLE OR SUBJECT

PURPOSE A brief (one or two sentence) statement of the concept, idea, or purpose of the paper. If it is in response to a question, quote or paraphrase the question and include the answer.

BACKGROUND Brief description of issue, topic, or program and generating factors. Provide salient factual information. Ensure clear understanding. Avoid lengthy discussion.

STATUS OR DISCUSSION Concise, factual statement of current status. Relation to established guidelines, goals, steps, prediction; recent or proposed developments, trends, progress, changes, plans, forecasts. State Navy positions, if applicable. State anticipated or desired resolution. Indicate congressional or intraservice interest and interservice liaison, as appropriate.

PROBLEMS Specific, concise listing of impact of unresolved problems, critical decision dates, contingent requirements. State Navy position when different. State specific corrective actions in progress or contemplated.

OTHER PARAGRAPHS To avoid "clutter," use minimum additional paragraph headings necessary for clarity. Every

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TITLED AS attempt should be made to include all pertinent
REQUIRED information within standard paragraphs, above.
Basic paper should be limited to one page. Put
detailed discussion, rationale in tabs, not in
basic paper.

FUNDING Include if pertinent.

CONCLUSION Conclusion and recommendation must be succinct
OR and specific. Avoid broad, general, nonspecific
RECOMMENDATION recommendations or requests for action.

TAB A Subject or title
TAB B Subject or title
TAB C Subject or title

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TALKING PAPERS

1. This enclosure provides information to assist in the preparation of talking papers.

2. Talking papers are prepared to give salient points on a subject about which the speaker is familiar. The purpose of the talking paper is to state the issue and all germane points in a succinct format to use in discussing the subject.

3. The format of talking papers will be as follows:

Rank, Name, Service
Code, Telephone Extension
Date of Preparation

TALKING PAPER

Subj: (Title or Subject)

Ref: (a) (if any)

Encl: (1) (if any, but try to avoid)

- Major point
 - Sub-Point
 - Additional sub-points
- Other major or related points and sub-points
- Conclusion or recommendation

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BRIEFING GUIDELINES

1. This enclosure provides information on delivering concise and effective briefings to the Commanding Officer.
2. The following lists proven guidelines which, when adhered to, will contribute to the conduct of a successful and effective briefing.
 - a. Keep overhead slides clear and simple. Utilize large text so that a person in the very back of the room can clearly read the overhead slide. Refrain from busy slides with numbers too tedious to express a major point. Quality slides that are well thought out, are a key factor in an effective briefing.
 - b. Keep briefings simple and short - the shorter, the better. Optimally, a briefing should last between 30 to 40 minutes. Longer briefings should be scheduled for two sessions.
 - c. Hit the important need-to-know points and eliminate unnecessary details from the brief. Be ready to answer questions on details and figures if asked.
 - d. Be attentive to the use of abbreviations, slang, and acronyms. Unless you are absolutely sure that the person you are briefing is familiar with the abbreviation, define it in your brief.
 - e. Speak clearly and slowly.
3. A briefing should be just that -- BRIEF. Do not attempt to overstuff the allotted time with too many details. Remember you are not trying to make your audience experts -- you are attempting to provide them with information to accurately base a decision.
4. If asked questions, provide a concise brief answer. Most important - IF YOU DON'T KNOW THE ANSWER - STATE SO. Do not embellish the facts or make up an answer. Simply state, "I'm not sure. I'll get back to you with the answer."