Communicating Intelligence to Decision Makers

Prepared for the NC State University Laboratory for Analytic Sciences
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Disclaimer

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Communicating Intelligence to Decision Makers

Mid-career intelligence analysts selected to brief senior individuals outside their organizations face a daunting task. The skillset and training that make them strong intelligence analysts are markedly different than those needed to professionally communicate intelligence. This can result in ineffective engagements with senior leaders when analysts do not properly convey the meaning of intelligence.

Poor communication often leads to decision makers acting upon misused, misunderstood, or neglected intelligence. Currently, there is a gap in research on and recommendations for standard communication practices in intelligence. This report seeks to fill those gaps.

Research Question

Before and during initial or early-stage interactions with unfamiliar principals, how can intelligence professionals best communicate complex information to decision makers to enhance their understanding of intelligence?

Findings

Through interviews with 19 industry professionals across four “bins,” we have identified several key findings that form the basis of an effective initial engagement. We organize these findings into three distinct categories:

- **Characteristics of an effective communicator**, which include preparedness, credibility, flexibility, and confidence. Prepared briefers synthesize information and understand their principals. Credible briefers are trustworthy and competent. Flexible briefers are agile and humble. Confident briefers are masters of their material and calm under pressure.

- **Considerations for an effective engagement**, which include context, time, modality, and organizational perspective. Context focuses on the type of engagement and the principal’s equities. Time covers the time allotted for an engagement, the principal’s schedule, and the intelligence time frame. Modality accounts for the principal’s information uptake preferences and constraints. Organizational perspective pertains to key points and avoiding pitfalls.

- **Conventions for an effective engagement**, which include ensuring message clarity, delivering a penetrating narrative, earning trust, tailoring the communication strategy to the principal, and identifying the anchor. Message clarity entails distilling the message and being accessible to the audience. Penetrating narratives generate and hold interest while staying relevant to the principal. Earning trust requires acknowledging limitations, remaining neutral, and anticipating reactions. A tailored communication strategy meets the principal’s needs and plans for reciprocity. Identifying the anchor means grounding the message in the key points.

Recommendations

In this report, we outline specific actions an intelligence professional should take both before and during an engagement to improve the transmission and receipt of complex information. These recommendations address preparation for an engagement and packaging of information to promote effective communication, as shown in the model of communication strategy on the following page.
While crafting a message in preparation for an engagement, briefers should:

- **Determine relevant information** by collecting and analyzing intelligence and gathering information on the principal.

- **Build the brief** by synthesizing inputs and organizing the message.

- **Red team the brief** by anticipating questions and reactions, assessing language, and addressing weak points.

During an engagement with a principal, briefers should:

- **Open the engagement** by defining its purpose, connecting it to stakeholder equities, and emphasizing key points.

- **Assess the principal’s reaction** and adjust communication strategy accordingly.

- **Conclude the engagement** by answering any outstanding questions, summarizing key takeaways, and gauging the principal’s understanding.

## List of Abbreviations

The following alphabetized list defines the various abbreviations and acronyms used throughout this report.

- **BG**: Brigadier General
- **COL.**: Colonel
- **CIA**: Central Intelligence Agency
- **DOD**: Department of Defense
- **GEN**: General
- **IC**: Intelligence Community
- **ICD**: Intelligence Community Directive
- **LAS**: NC State University Laboratory for Analytic Sciences
- **LTG**: Lieutenant General
- **MG**: Major General
- **NGO**: Non-governmental organization
- **NSA**: National Security Agency
- **ODNI**: Office of the Director of National Intelligence
- **Ret.**: Retired (military officer)
I. Introduction

Some individuals are naturally gifted communicators who intuitively synthesize information, effortlessly distill points into a resonant message, exude confidence, and rapidly build rapport in new environments. Others lack these intrinsic skills yet still find themselves thrown into situations where they are responsible for communicating critical information to an unfamiliar superior who possesses limited knowledge of the topic at hand. For even the most seasoned analysts, communicating complex information to a decision maker can seem daunting.

In the intelligence context, when analysts struggle to effectively communicate their message while briefing a principal, breakdowns in the intelligence cycle can occur, leading to ineffective engagements. Often, these analysts receive insufficient guidance on how to prepare for engagements and how to react in real time to a principal’s needs. For even the most seasoned analysts, communicating complex information to a decision maker can seem daunting.

We posit that successfully transmitting complex information does not require an individual to possess an innate knack for communication. Rather, analysts can follow a concrete list of action items to prepare for an engagement and become more effective communicators.

Our report seeks to answer the following question:

| Before and during initial or early-stage interactions with unfamiliar principals, how can intelligence professionals best communicate complex information to decision makers to enhance their understanding of intelligence? |

This report specifically targets mid-career intelligence analysts tasked with delivering an intelligence assessment to a senior individual outside of their organization. In this report, we investigate the structural underpinnings of communicating intelligence as perceived by senior leaders who regularly receive and/or deliver complex information.

Our research contributes to the IC’s understanding of evolving communication strategies. It is vital that the next generation of intelligence professionals adopt lessons gleaned from senior decision makers on how they best process information. However, these lessons must translate into operationalizable frameworks with tangible steps and clearly defined goals and outcomes.

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We begin this report by painting a picture of the intelligence communication landscape. We identify gaps in the literature with respect to communicating intelligence and draw from academic and private sector sources to gain a better understanding of other communication processes. Next, we detail our methodology and interview plan. Drawing from the interviews with industry professionals, we highlight key findings about communicating intelligence. We use these findings to develop a model, flowchart, and list of recommendations for early-stage engagements with unfamiliar principals. Finally, we discuss the limitations and challenges associated with this report.
II. Intelligence and Communication

The Intelligence Cycle

The intelligence community (IC) encompasses 18 organizations that exist to “collect, analyze, and deliver foreign intelligence and counterintelligence information to America’s leaders so they can make sound decisions to protect our country.” These institutions fall under the purview of the ODNI, which is responsible for setting the priorities for the IC and ensuring that all members adhere to overarching principles and guidelines for constructing intelligence.

The intelligence cycle is the methodology the IC uses to “develop raw information into finished intelligence.” It is a cyclical approach that constantly updates and evaluates information to inform decisions. The intelligence cycle comprises six steps as outlined in Appendix A: (1) planning and direction, (2) collection, (3) processing and evaluation, (4) analysis and production, (5) dissemination, and (6) evaluation.

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Though dissemination of intelligence is one of the six steps, the act of communication to decision makers is not unto itself a discrete part of the intelligence cycle. Of 65 published ODNI intelligence directives, none specifically cover how to communicate intelligence to decision makers. Dissemination is distinct from communication because it implies a one-way flow of information and lacks a specified endpoint. It also does not consider the target audience, their preferences, or position.

In 2015, the ODNI published Intelligence Community Directive (ICD) 203 Analytic Standards. This directive established five foundational standards that guide the analysis of intelligence: (1) objectivity, (2) independence from political consideration, (3) timeliness, (4) comprehensiveness, and (5) rigor. ICD 203 also provides guidance on how to actualize the five analytic standards through nine analytic tradecraft guidelines (see Appendix B), but explicitly ties those requirements to the production of intelligence rather than consumption.

ICD 208 Write for Maximum Utility offers an outstanding framework for thinking through considerations with written communication. It exhorts members of the IC to build training curricula “to think inclusively about their customers, their operating environment, and how their various customers use their products.” This consumer-oriented approach to communication offers a distinct perspective on the production-oriented intelligence cycle. However, ICD 208 does not offer additional guidance on communicating complex information to decision makers.

Our report expands upon the consumer-oriented approach to communicating intelligence by operationalizing the guidance provided in ICD 208.

Challenges in Communicating Intelligence

Intelligence features several unique constraints that complicate its communication. The ODNI Classification Guide informs specific limitations associated with the transmission of intelligence. Although other industries or government have functional constraints, the specificity and strength related to intelligence compel consideration:

• Classification. The intelligence community is bound by an information classification system that stratifies information and establishes rules for how,
when, and where to communicate intelligence. While other government organizations sometimes deal with classified information, intelligence is unique because it is overwhelmingly classified.

- **Independent discipline.** Intelligence analysis is its own discipline. Many of the processes, attributes, and outcomes work according to a taxonomy and methodology that are unique to intelligence. More importantly, the discipline is not common or frequently used outside the IC. Thus, most individuals who lack exposure are unfamiliar with fundamental principles commonly used in intelligence analysis.

- **Unique customer base.** Intelligence customers consist of decision makers from a variety of institutions. Due to the diverse backgrounds among principals, there is no single method or modality that caters to the needs of every possible engagement.

James B. Steinberg, former deputy secretary of state for President Barack Obama, frames three additional challenges uniquely associated with the communication of intelligence in *The Policymaker’s Perspective: Transparency and Partnership*. First is the IC’s inability to provide certainty. Second, intelligence professionals often communicate with an abundance of caution and skepticism. Third, policymakers often believe that intelligence professionals lack connection with their challenges and day-to-day realities. These factors are especially apparent when the decision maker is unfamiliar with the presenter.

The constraints and challenges associated with intelligence underscore the need for a standardized set of communications principles specific to the IC. However, because of the lack of explicit guidance on communications techniques in the IC, communications breakdowns can occur quite frequently.

There are several reasons for communications breakdowns. Policymakers may not clearly articulate the type of intelligence product they need. Politicization may cause policymakers to interpret intelligence products in a different manner than intended. Decision makers may have varying preferences for how to receive intelligence that are unknown to the presenter. Delivering extraneous information may result in the misunderstanding of intelligence products. Members of the IC may struggle to explain how products fit or assist the policymaking process. Ineffective preparation and delivery may result in misuse, misunderstanding, or neglect of intelligence.

Detailed guidance on communications principles can help address these specific causes of communications breakdowns in the intelligence cycle.

Detailed guidance on communications principles can help address these specific causes of communications breakdowns in the intelligence cycle. However, there is a dearth of intelligence-specific communications literature. Of the literature that does exist, much of it centers on high-level individuals who are familiar with each other and have an abundance of experience. This offers little guidance for situations where the briefer and principal are unfamiliar with each other.

Most literature that addresses intelligence communication comes from the CIA. In 2014, the CIA published an anthology of 42 reports and essays examining the interaction between policymakers and intelligence producers. This compilation is rich with examples of interactions, offering expansive overviews and insights into successful relationships. But in general, almost all reports stop short of building a way to communicate intelligence. This is because consumption preferences are individual, and generalizing is practically impossible.
In *Bridging the Intelligence–Policy Divide*, James Barry offers recommendations for improving communication between the IC and policymakers. He stresses the importance of building trust with policymakers by strengthening their understanding of the intelligence gathering process and providing objective, timely feedback on the products received. Next, John McLaughlin’s exposition on *Serving the National Policymaker* ascribes five critical components to consider when preparing intelligence assessments: “Accuracy, Clarity, Timeliness, Revising Judgments, and Alternative Views.”

Previous studies have identified the need for the IC to cultivate communication skills in its professionals. George Washington University professor David Broniatowski, who conducts research in decision making under risk, published a study in 2019 that recommends the IC “develop a cadre of professionals who excel in communicating the gist of analysis products to decision makers.” A 2005 dissertation published by the RAND Corporation asserts that while policymakers considered briefings the most useful source of analysis, the “major shortfall of the briefing is that most intelligence briefers are analysts, and in a crisis…analysts are most busy collecting their own data to analyze.”

### Communication in Other Fields

Because intelligence-specific literature on modes, methods, and techniques of communication is sparse, our team examined works from the private sector and academia.

**Private Sector.** Ana Mendy, Mary Lass Stewart, and Kate VanAkin of McKinsey & Company produced “A leader’s guide: Communicating with teams, stakeholders, and communities during COVID-19.” The guide emphasizes clear communication during crises, especially since at “a crisis’s onset, audience attention is finite; new, disruptive inputs overwhelm a person’s ability to process information.” The guide also focuses on an organization’s frequent, honest messaging, which is essential to building trust.

Dr. Ajit Kambil of Deloitte University published an executive transition guide to assist incoming executives with more effectively navigating and engaging with “C-suite” personnel. He finds that awareness of the personality types of both oneself and the CEO can shape how an executive communicates to improve their team’s understanding. The guide identifies personality typologies like the Myers–Briggs Type Indicator and TetraMap and introduces a Deloitte typology that delineates four distinct business personalities: Driver, Pioneer, Integrator, and Guardian. Another common refrain is the “Cs of communication.” For instance, Prachi Juneja of Management Study Guide presents the 7 Cs for Effective Communication: “Correctness, Clarity, Conciseness, Completeness, Consideration, Concreteness, and Courtesy.”

Some companies create opportunities to train their employees on effective communication practices. Connect Frontier LLC CEO Grant Harris “teaches interactive seminars on How to Brief the President (or Any Senior Leader).” He provides tips on what to do before and during a meeting with a senior leader:

**Before You Walk into the Room**
- Identify the “crucial nodder.”
- Know your boss’s “tells.”
- Find out how the boss engages with the material.
- Plan for gradations of success and failure.

**Once You’re in the Room**
- Read the room, not your notes.
- Stay laser focused on your task.
- Practice the art of staying silent.

**Academia.** As our research expanded into other disciplines, we discovered several communicative frameworks with applicability to
the intelligence cycle. In *Survey on Individual Differences in Visualization*, Zhengliang Liu et al. find that individuals have distinct cognitive traits. This means that the standardization of intelligence production will lead to a “widely different interpretation and understanding” among consumers.¹⁹

Ultimately, we settled on a model of communication developed in Samantha Cartwright et al.’s *Communicating Complex Ecological Models to Non-scientist End Users* (Figure 1 below) as an instructive starting point.²⁰ Cartwright et al.’s study establishes a framework for scientists interacting with external stakeholders who may lack deep familiarity with scientific principles. The challenges addressed by the model mirror ours: two from the lens of the stakeholder (political context and stakeholder experience), and three practical challenges (model characteristics, conveying uncertainty, and the communication format required by stakeholders).

This model presents stark similarities to the challenges encountered in communicating complex intelligence to policymakers. These considerations form the baseline upon which we explore solutions through our interviews with industry professionals.

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**Figure 1: Cartwright et al.’s Model of Communication**
III. Methodology

We employ a multi-method approach that combines a literature review with qualitative research. We conducted semi-structured interviews with industry professionals focused on phenomenological findings. The findings from these interviews informed a model of communicating intelligence as well as a set of recommendations for each phase of the model.

Our objective with this research is to capture specific industry professionals’ perspectives and translate findings from interviews into models, recommendations, and prototypes that LAS can test for applicability. This approach is distinct from many other types of research into this subject matter because of the operationalizable construct.

This method is well suited for researching the communication process and components specific to initial engagements because it allows for the exploration of emergent perspectives while adhering to the main research themes. Appendix C elaborates on our methodology in further detail.

Interviews

We applied a purposive sampling approach to identify professionals across multiple industries. Each member of the team drew upon their personal and professional networks, as well as the networks available at both the Sanford School of Public Policy and the Fuqua School of Business at Duke University. We categorized these professionals into four distinct bins based on their expertise:

- The **military bin** consists of professionals who have served in the U.S. military and/or have worked in the DOD.
- The **legislative bin** consists of professionals who have worked in or with Congress.
- The **executive bin** consists of professionals who have experience in government agencies outside of the DOD.
- The **non-government bin** includes think tanks, NGOs, and private companies. These professionals have experience in crisis management and time-condensed decision making.

Our initial interview participant goal was between 16 and 28 industry professionals. Ultimately, we conducted 19 interviews. See Appendix D for the full list of interviewees and Appendix E for a sample list of interview questions. Each interview lasted approximately 30 to 45 minutes. Due to the COVID-19 pandemic, we conducted most interviews remotely using Zoom and phone calls. We employed a team interview approach with one primary interviewer and one note taker. When possible, we obtained permission to record the interviews. For interviews where recording could not happen, the notetaker captured both direct quotes and key takeaways from our interviewees.

After each interview, we hand coded emergent themes using an inductive approach and uploaded the code to NVivo, a descriptive coding software. Those themes form the foundation of our findings.
Interviews with industry professionals offered a breadth and depth of insights into intelligence communication. In general, every industry professional described an experience that involved poor or ineffective communication of intelligence, highlighting the importance of the following findings. See Appendix F for additional insights.

For clarity, we have categorized our findings into three overarching sets of themes (“the three Cs”): Characteristics, Considerations, and Conventions. This approach is deliberate and builds upon itself.

- **Characteristics** describe traits and attributes effective communicators share.
- **Considerations** capture the functional components that enable a briefer to demonstrate those required characteristics.
- **Conventions** illuminate the best practices and strategies for effective engagements.

**Characteristics of an Effective Communicator**

Naturally gifted communicators intuitively synthesize information and effortlessly distill the vital points into a resonant message. They exude confidence and charisma, have an uncanny knack for understanding their principals, and rapidly build rapport and trust in new settings.

Not everyone possesses these intrinsic traits. However, briefers can learn to become more effective communicators by developing several key characteristics. Industry professionals identified four distinct and foundational characteristics strong communicators share that are critical for an effective engagement. These are particularly important for a briefer meeting with a principal for the first time or any situation where the briefer and principal are generally unfamiliar with each other.

1. **Preparedness.** Strong briefers arrive at engagements having done their homework. As former Principal Deputy Director of National Intelligence Sue Gordon notes, briefers should approach each engagement “not hoping for success but preparing for it.” Key aspects of preparation include researching and synthesizing the relevant information into a digestible product as well as understanding the principal on the other side of the engagement. BG J. Pat Work explains the importance of preparation:

   “Make sure [the principal] gets their facts right. Preparation is 80% of the engagement. Don’t let your leader fail because of your information. Make sure you acknowledge that the information could have changed since you started…but get that right!

   **Synthesize information:** Briefers should be knowledgeable beyond the intelligence they deliver to their principals. They should familiarize themselves with as much information related to the subject as possible and be able to distill it into an intelligence product that meets the principal’s needs without being superfluous.
or extraneous. Gordon advises briefers, “You need to know five times more than you think you need. The only rule is you can’t answer beyond your limit.”

You need to know five times more than you think you need.

Understand the consumer: Briefers should understand the individual on the other side of the engagement. Every principal has a different set of preferences, needs, and priorities. A prepared briefer recognizes how the requested intelligence product fits into the principal’s needs and priorities and tailors the brief accordingly. This avoids forcing the principal to waste energy determining why an intelligence product is relevant to them. LTG (ret.) Flora Darpino offers the following insight:

I find the most effective communicators are those who are prepared, understand the language of the person to whom they speak, and speak in their language and communicate and translate their thoughts into what the briefer understands. You have to be able to do it in a manner that is not condescending.

2. Credibility. Effective briefers establish credibility with principals by demonstrating both trustworthiness and competence. Col. (ret.) Jack Einwechter stresses that “credibility is based on trust. It’s based on a history of performance.”

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Trustworthiness: To take action, a decision maker needs to trust the veracity of the intelligence delivered as well as the impartiality of the briefer. If not, the engagement will tilt the principal’s focus away from absorbing the intelligence toward verifying the accuracy of the information.

One method by which briefers can establish credibility is by being forthright about what they do not know rather than delivering an uncertain, incorrect, or otherwise flawed response to a question from a principal. Troy Clair, former chief of staff to U.S. Representative G. K. Butterfield (D-NC), recommends:

If there’s something [briefers] don’t know, then they [should] say, ‘I don’t know, and I’ll get back to you.’ That’s very important, particularly when the person is trying to present information to you or you’re having a conversation about something where there’s an area of disagreement.

Competence: Credibility requires principals to have faith that briefers know what they are doing. To achieve this, briefers must get the job done by meeting the principals’ needs. However, principals often give briefers a short leash, as GEN (ret.) Martin Dempsey cautions:

If a briefer comes in and doesn’t scratch the itch the first time, I will give feedback and expect more the next time. If the briefer comes back without changing, they don’t come back. I tell them, ‘It’s not personal; we’re just not communicating.’

While the idea of establishing professional credibility is not new, the industry professionals exposed us to a frequently ignored challenge: not every briefer receives the same level of organizational credibility when talking with a new principal. Too often, race, gender, or speech distinguisher (e.g., an accent) serve as discriminators against the communicator. The female industry professionals we interviewed highlighted this often-unspoken aspect of communication. Even though they reached the pinnacle of professional success, they still described feeling an additional burden to demonstrate competence. They described how principals would often pose stronger challenges to the veracity or completeness of the information when provided by an individual
who identifies as female. LTG (ret.) Darpino experienced this throughout her career:

”There are certain categories of people that, when they walk into a room, will be discounted, based upon the way [they] look, be it [their] gender, [their] skin color, [their] accent… I knew that I had to be better prepared and more articulate than someone who did not look like me. I also knew that people were going to push back, and they were going to test in a different way, like they were going to assume that I didn’t know. They were going to push, test, and needle and see if they could… prove their preconceived notion correct. That’s why I was very professional [and] very decisive.

3. Flexibility. A briefer should be willing and able to adapt to the flow of an engagement as it unfolds. Effective communication is an interactive process, making it impossible to perfectly predict how a principal may respond or react to a particular communication strategy. Despite preparation, it is possible that a briefer’s initial communication strategy may not meet the principal’s needs, requiring a strategic adjustment mid-engagement. Briefers can demonstrate flexibility by being agile and humble in response to these challenges.

Agility: Strong communicators should be adept at switching gears without faltering. Sometimes, principals may only have a limited amount of attention, forcing briefers to adjust their communication strategies on the fly. Asher Hildebrand, former chief of staff to U.S. Representative David Price (D-NC), advises individuals briefing members of Congress, “don’t be offended if they cut you off or interrupt you. Don’t be offended if they don’t ask you any questions.”

Humility: Oftentimes, briefers may cling to their initial strategy because they spent a significant amount of time developing it. This dogma results in rigidity that can lead to ineffective engagements. Instead, briefers should be willing to let go of their initial communication strategy if principals do not respond as expected, as MG Greg Mosser illustrates:

”[I’m] not going to be disrespectful, but if somebody starts taking [an impatient] tone, [it’s important] to be able to remain calm and come back and say, ‘I apologize. Let me try to make my point again.’ Because there the focus is on ‘am I transferring the information correctly’ as opposed to… ‘Okay, I’ve just got to get through this. I want this senior leader to say good job at the end, I want them to like me, and I want them to think that I’m a good person.’

4. Confidence. Effective briefers exude belief in themselves without appearing arrogant. MG Mosser posits that “the people who best transfer information are confident in themselves. They know where it is they need to head. They’ve thought ahead about what this briefing should do for this leader, and they understand where it is that they want to go.”

The people who best transfer information are confident in themselves.

Confidence can be tricky; if showing confidence were simple, everyone would succeed at doing so without practice. In our conversations with industry professionals, we asked for specific markers they look for to determine whether a person had confidence.

Mastery of material: Deep understanding of the intelligence, a sign of a prepared briefer, is a surefire marker of confidence. Scott Blackburn, a partner at McKinsey & Company, says that confident briefers “[demonstrate] enough command of the content to either answer or bring in the right level of expertise.” Mastery of the material confers self-assurance in one’s ability to answer a principal’s questions and adapt to the changing circumstances of an engagement without wavering.
Calmness: Confident briefers are calm under pressure, even if they may be nervous internally. Sometimes, nervous briefers may default to poor communication habits, including speaking too fast, stumbling over words, becoming defensive, or overwhelming the principal with too much information. Remaining calm conveys to the principal that the briefer has poise. GEN (ret.) Dempsey recounts his experience: “I started every briefing gauging the confidence of the briefer while presenting. The more he/she owned it, the more I was ready to push and be engaged.”

Considerations for an Effective Engagement

Although each engagement is unique, there are fundamental considerations that apply to most situations. Industry professionals offered insights in response to a line of inquiry on what they felt mattered to them when receiving information. These findings capture their responses.

1. Context. The most important consideration is the context in which an engagement occurs. Context elicited the strongest and most frequent responses from industry professionals. Ultimately, briefers should consider the type of engagement, the purpose of the engagement, and how it connects to stakeholders’—namely the principal’s—equities.

Type of engagement: Before a briefer can provide value, they first must understand the “why” behind the engagement. Is it an information brief or a decision brief? This fundamental question will influence key facets of the information strategy and brief structure. Often, the intelligence transfer may happen informally. Hildebrand explains how one of the first questions he asked his staff when preparing for a senior leader engagement was “is this a meeting in their office or a meeting that’s going to be on the fly…is it a walk and talk?” Understanding the type of engagement and why it is necessary reduces uncertainty and confusion during the engagement.

A lot of people who communicate don’t start with context.

Stakeholder equities: Too often, briefers begin engagements by diving right into the complex information without connecting to what matters to the principal. This approach often results in a principal losing interest in the intelligence product. Instead, briefers should deliberately develop an understanding of the principal’s considerations connected to the intelligence. These include their position, experience, familiarity with the intelligence, and career trajectory and aspirations. Clair details how some briefers fall short:

“A lot of people who communicate don’t start with context. You just go in with your talking points and [do] not provide me with context for what you’re talking about, and so I’m lost…I think that [context is] important, particularly when you are coming from a company or trade association trying to explain an issue that you’re very familiar with, but that the person you’re talking to may not be very familiar with at all.

Connecting to the principal requires anticipating how that principal may react to intelligence and understanding why they react that way. LTG (ret.) Darpino views anticipation as one of her strengths:

“My strength in briefing others has been my ability to think behind the question I’m asked. If I’m asked to come in and talk about, ‘why is the sky blue,’ it’s my responsibility to say, ‘why would they care why the sky is blue?’

2. Time. Briefers should consider the temporal aspects of engaging senior leaders. This includes the leader’s time available, how the engagement fits within their schedule, and the urgency of the intelligence.

Time available: Simply put, this covers the amount of time allotted for an engagement with the principal. Several industry professionals
offered alternative ways of thinking about time available. Andy Vail, a senior national intelligence service officer, suggests that instead of attempting to fill up the entire engagement time just because it’s scheduled, the focus should be on “telling them what they need to know and nothing more.” If doing so only uses up five minutes of a 30-minute meeting, then only use those five minutes. If the goal is to provide usefulness to the decision maker, then follow Gordon’s advice: “tell the story and spend the rest of time answering their questions.”

Tell the story and spend the rest of the time answering their questions.

Schedule: An intelligence engagement will only take up a small part of a principal’s schedule. Understanding how it fits within the broader context of the principal’s day is crucial. BG Work recommends “put[ting] yourself in your boss’s shoes. What is the context of your engagement? Did they just return from or are they headed to an important meeting that day?”

Time frame: A briefer should understand the temporal urgency (or lack thereof) of their information as it relates to the principal. The problem, as GEN (ret.) Dempsey puts it, is, “the later you get [intelligence], the less likely it is you’re going to absorb it.” Conversely, briefing intelligence that either connects too far in the future or is not a current resonant concern for the principal may lead to a negative response. This response may not have anything to do with the veracity of the intelligence or its delivery. Rather, because the timing is off, the entire interaction now has diminished usefulness. Thus, unless the information is time-sensitive, it is vital to be deliberate on when to include specific portions of intelligence.

3. Modality. A briefer should consider how to package their intelligence (i.e., the medium of presentation) in a way that ensures the principal receives their message. The key to determining modality lies in balancing the principal’s preferences for receiving information with the briefer’s constraints conveying it.

Preferences: First and foremost, a briefer should consider how the principal likes to consume information. The cardinal rule of an intelligence briefer, as described by LTG (ret.) Darpino, is “to become steeped in [the principal’s] language…you need to speak their language. They don’t need to speak yours.” Intelligence briefers need to adapt to the needs of the principal. This adaptability manifests itself in the ability to process feedback and not get flustered when engagement with the principal stalls. A common theme in our research regarding modality is being able to elaborate on any documents, statements, pictures, or slide decks used during the briefing.

Constraints: The uncertainty regarding principals’ idiosyncratic preferences for consuming information poses a challenge for intelligence briefers choosing a modality. Dr. Rob Johnston summarizes a key component of this challenge: “A lot of policymakers do not know how they prefer to consume information.” This creates constraints on briefers.

Despite this uncertainty, briefers can overcome these constraints by packaging their message to cater to their principals. If possible, briefers should prepare by reaching out to the principal’s staff before the meeting. Briefers should also focus on delivering a concise message that lays out the meeting’s purpose.

4. Organizational Perspective. Briefers should consider the perspective of their organization when entering an engagement. Understanding the organization’s point of view helps briefers identify then prioritize the key points from the intelligence. Briefers should then identify specific organizational pitfalls that could derail the engagement or understanding of the intelligence.

Key points: Every briefing should have an overarching set of key takeaways that both the
briefer and principal can identify and understand. Prioritizing these key points keeps both the briefer and principal focused on the central message that conveys the briefer’s organization’s perspective. They also anchor the discussion and help to avoid digressing along tangents. Several industry professionals stressed the importance of using concise language to disseminate a clear message to the principal.

Hildebrand advocates for a briefing to have three key takeaways. His work experience makes him “a firm believer in the rule of three…if [a briefer] can get [their key points] to three, that always feels like about the upper limit…if you come in with more than three, be prepared for the question of what’s your number one?”

Pitfalls: A briefer should not let a principal walk away from an engagement either misunderstanding or misconstruing intelligence. Doing so would be detrimental to the briefer’s organization. GEN (ret.) Dempsey is mindful of this, always asking himself and his team, “What mistake can I make? … What can’t they come away believing?” Specifically, he would “listen for misuse” so he could correct any misconceptions. Actively gauging the principal’s level of understanding throughout an engagement helps to check against misuse.

Conventions for an Effective Engagement

To increase the effectiveness of engagements, industry professionals recommend several strategies and best practices that package the characteristics of effective communicators and considerations for an effective engagement and translate them into an action-oriented context.

1. Ensure Message Clarity. For a message to resonate, it must be clear. Briefers should distill the message, organize the information for each engagement, and focus on making the information accessible to the audience.

Distill the message: Prepared briefers will have already synthesized the intelligence into a digestible product. When delivering a briefing, briefers should distill their message into a key point or set of points, including only the information that is necessary. Doug Brook, former assistant secretary of the Navy, refers to this as the “principle of parsimony.” Hildebrand recommends:

“[Have] the discipline to say, ‘okay, I’ve conveyed my key point.’ Be comfortable with silence… ‘I’m going to stop and wait and make sure that there are no questions before moving on to this next thing,’ [Break] down the brief into digestible components.

Be accessible: Ineffective briefers assume that their audience speaks the same language. While this may be true in some contexts, there are situations where a briefer and a principal do not possess the same vocabulary. A critical mistake is to default to industry jargon, leaving the principal confused about the message being delivered. Briefers should instead heed LTG (ret.) Darpino’s advice to “understand the language of the person to whom they speak and speak in their language.”

When you use up the bandwidth, you’ve lost connectivity.

2. Deliver a Penetrating Message. Senior leaders have limited bandwidth and often must contend with several priorities competing for their attention. Gordon notes that “when you use up the bandwidth, you’ve lost connectivity.” A briefer should focus on crafting and delivering a message that cuts through the noise and commands a principal’s attention. A penetrating message generates interest, is relevant to the principal’s equities, and does not get bogged down in minute details.

Generate interest: The beginning of an engagement sets the tone for the entire interaction between a briefer and a principal. A briefer should look to immediately capture the principal’s attention with an engaging hook that provides context to the facts the principal
already knows. If briefers fail to do so at the outset, principals may tune them out, rendering the entire engagement ineffective. GEN (ret.) Dempsey recounts his experience with poor briefers who failed to pique his interest:

"Bad briefers tend to regurgitate things they already sent over in written form. You don’t need to re-read it to me…tell me what to do with it. How should I be looking at this? There is a propensity in Washington to regurgitate what someone else has already said, and it is not always helpful.

A common pitfall of ineffective briefers is their tendency to spend too much time fleshing out the less important details of a subject during an engagement, losing sight of the bigger picture. Brook advises briefers to “tell [principals] what they need to know and nothing more.”

… tell [principals] what they need to know and nothing more.

Stay relevant: Prepared briefers will have done the work necessary to understand their principals and what matters to them. They also will have considered the context in which an engagement occurs by focusing on the principal’s equities. To increase the likelihood of a successful engagement, briefers should draw upon that prior work by linking the intelligence product to what matters to their principals.

3. Earn Trust. Trust is essential for effective communication; once lost, it can be almost impossible to recover. Clair describes how trust (and a lack thereof) affects interactions in his work:

“... It really was a measure about whether or not the person was going to be honest and upfront with me. If we couldn't stipulate that point, then I felt that there was no more progress going to be made...Even in my work now, I make sure that when we are deciding what response we'll have to this particular issue or preparing for a meeting with a member or staff person, that we’re starting with facts, and we’re starting with being an honest broker, even if we ultimately have a difference of opinion.

Credible briefers earn trust by being honest brokers and demonstrating competence. The industry professionals we interviewed identified three best practices for building and maintaining trust: acknowledging limitations, maintaining neutrality, and anticipating reactions.

Acknowledging limitations: Credible briefers earn trust not only by sharing what they do know, but also by acknowledging what they do not know. Being forthright about one’s limitations signals to a principal that the briefer is honest and self-reflective. Indeed, Scott Blackburn notes that one of the best briefers he worked with was “smart, but he knew what he did not know...[and] trusted the expertise around him.”

Maintaining neutrality: While Gordon recognizes that “intelligence is never neutral,” striving to provide information in a neutral, nonleading manner is imperative to ensure the principal does not believe a briefer is withholding or skewing intelligence. Briefers who inject their own biases into their intelligence products risk undermining the integrity of their work.

Anticipating reactions: Anticipating a principal’s needs, interests, and responsibilities can assist in building trust by assuring the principal of the briefer’s competence. As GEN (ret.) Dempsey explains, “A great communicator is proactive, when they sense not just what they are being asked, but they understand what is underneath it and find ways to get at it creatively.” When a briefer can both provide the necessary information and the depth and nuance to better understand it, the principal will trust the briefer’s ability to deliver.
4. Tailor the Communication Strategy. A critical best practice is tailoring one’s engagement strategy to the principal. Like with delivering a penetrating message, this requires understanding what is relevant to the principal. Briefers can craft a tailored communication strategy by putting themselves in the principal’s shoes, discovering the principal’s “unwritten rules,” and planning for reciprocity. LTG (ret.) Darpino says that, as a briefer, “it’s my responsibility to find out what they want. Then once you’re in the briefing, you have to be able to follow the thread.”

A briefer should consider how a principal may use the intelligence to make a decision. During an engagement, a briefer should plan for reciprocity by continuing to refine their communication strategy in response to the types of questions asked and how the principal reacts to the information. This becomes easier as a briefer learns the principal’s “unwritten rules,” or the implicit engagement norms and preferences that govern their interactions.

5. Identify the Anchor. Briefers should determine the central ideas that hold the broader message in place. To do this, a briefer should establish key points, defend their analysis, and be ready to deliver the most important takeaway at any moment. Hildebrand emphasizes the importance of identifying the anchor when briefing members of Congress, who may be called away at a moment’s notice and cut an engagement short:

“Whatever the three key takeaways are, make sure that that whoever’s doing the briefing is ready to restate those, even if the meeting gets cut short. So, if you’re at slide six of a 12-slide deck…and all of a sudden, the bell is ringing and the member’s got to leave, then fast forward to slide 12: ‘Pretty quickly, I know, you’ve got to leave. Before we leave, I just want to make sure you understand these three things: 1, 2, 3.’

Much like how briefers who spend too much time in the minutiae of a topic tend to lose sight of the bigger picture, briefers who fail to anchor their briefings to a set of key points risk having their analyses fade into the background. This loss of focus detracts from the value of their intelligence products and turns engagements into a waste of time for the principals, who could simply get the same information via email.

Experienced Insight: Preparing to brief a senior leader

BG J. Pat Work’s experience as a senior leader briefer in the Pentagon provides a useful example of the thoughtfulness and effort applied by expert practitioners.

When preparing for an engagement, BG Work’s first action was to determine the purpose of the brief and the stakeholder’s context. He did this by assessing two components: the information to include and the sequence of the information. Structurally, every brief began with this ambitious goal: “align on the purpose of engagement by framing the problem—what are we trying to accomplish?” Although each engagement required a personalized touch, his go-to strategy was to “gallop where I can so you can focus and slow down on the important stuff.”

One of his secrets to success was to translate the information into the language of the principal: “Don’t use exclusive language: have emotional intelligence in the power of your language…This means removing jargon or exclusionary language from the message to increase its accessibility.”
V. Recommendations

Based on our research, we propose a series of recommendations to improve first-time or early-stage intelligence engagements. Our recommendations start with broad ideas and finish with specific individual actions a briefer can take both before and during an engagement. These top-level ideas include:

- **Rethink approach to crafting communication.** We recommend the intelligence profession embrace the creation of more resonant messages to improve the effectiveness of communication. This means incorporating the specific profiles of principals to craft tailored messages. The development of those profiles may require seeking additional input from principals. Importantly, the message tailoring should not shift or change the intelligence to suit the principal’s individual preferences. Rather, this recommendation centers on incorporating those unique considerations into the development and crafting of the message.

- **Develop deliberate training strategies.** We recommend that organizations create curricula to develop their junior and mid-grade intelligence professionals in the art of strategic communication. Members of the IC informed us that they never received formalized strategic communication training. Oftentimes, analysts were thrust into a briefing role and their success was contingent upon natural ability or luck. A better method for inculcating strategic communications skills would be to identify future intelligence communicators and invest time and resources to formally train them in the art of communication.

**Modeling Intelligence Communication**

We developed our own model of communicating intelligence (Figure 2, page 16) that builds on the model introduced by Cartwright et al. and incorporates the findings from our interviews with industry professionals. Each component of the model ties back to the three Cs elucidated in our findings. Appendix G provides a detailed list of questions intelligence professionals can ask themselves to improve their intelligence communication practices.

We divided communication strategy into two phases: crafting the message and engaging the principal. An optional third phase, feedback, is typical of situations where there is an existing relationship upon which to iterate to improve for future interactions. However, our report specifically focuses on early-stage and one-off engagements without an expectation of feedback from the principal.

Like any sender–receiver model of communication, our model is based on the flow of information between a briefer and a principal. The first three steps of the intelligence cycle—planning and direction, collection, and processing and exploitation—are external to any communication strategy because they occur outside of any engagement. The “Intel” box reflects those steps, which the briefer performs prior to preparing for an engagement. The analysis and preparation step of the intelligence cycle treats intelligence as a key input for an engagement.
Understanding the principal’s profile—including their position, experience, topic knowledge, social location, schedule, and uptake preferences—is essential to an effective engagement. However, the principal will not necessarily provide that information. It is incumbent upon the briefer—and the briefer’s organization—to gather that information and use it as an input when crafting a message.

The briefer begins developing a communication strategy by crafting a message. During this phase, the briefer determines what information is relevant using the intelligence and profile inputs. Next, the briefer builds out the brief, synthesizing the inputs into a coherent message and organizing it into an easily digestible deliverable. Finally, the briefer red teams the brief, anticipating the principal’s reactions, assessing the language used in the brief, and addressing any gaps or weak points.

During the actual engagement phase, the briefer should open the engagement by defining its purpose, connecting it to the principal’s interests, and emphasizing the central points or themes of the engagement. Throughout the engagement, the briefer should assess the principal’s reactions and determine whether the message resonates. If the principal does not respond to the initial engagement strategy, the briefer should adapt by employing a different communication strategy. At the end of the engagement, the briefer should summarize the key takeaways, answer any outstanding questions, and ensure that the principal has received the message.

Figure 3 (page 17) expands the model into a flowchart with key action items that traces communication strategy from the initial request for an engagement through the conclusion of the engagement.
Figure 3: Communication Strategy Flowchart

PHASE 1: CRAFTING THE MESSAGE

Step 1: Determine relevant information
- Start
- Receive engagement request
- Do you have all necessary intelligence?
  - Yes
  - No
  - Collect and analyze all necessary intelligence
- Are you familiar with the principal?
  - Yes
  - No
  - Build a profile of the principal

PHASE 2: ENGAGEMENT

Step 1: Open the engagement
- Structured opening
  - Define purpose of engagement
  - Connect to stakeholder equities
  - Emphasize key points

Step 2: Assess reactions
- Is communication strategy successful?
  - No
  - Assess language
  - Address gaps and weak points
  - Revise message
  - Finished intelligence product
  - Yes

Step 3: Conclude the engagement
- Finish delivery
  - Summarize key takeaways
  - Answer outstanding questions
  - Gauge principal’s understanding
  - End

FLOWCHART KEY
- Split / Merge
- Document
- Decision Node
- Start / End
- Action
- Input
At each phase of the communication process, our model and flowchart highlight action items that address and tie back to the findings from our interviews with industry professionals. Implementing these action items before, during, and after an engagement with an unfamiliar principal will improve the efficacy of that engagement. Briefers who follow these steps will be more prepared, ensuring greater flexibility and confidence in their mastery of the material. This generates credibility in the eyes of the principal and enables the briefer to earn trust.

**Phase 1: Crafting the Message**

These action items help briefers build out a more coherent, effective brief before entering an engagement with an unfamiliar principal.

**Step 1: Determine relevant information.**
After completing the requisite collation and analysis of intelligence, the briefer must decide what information to include in a brief. While the briefer should have deep knowledge about the topic on which they will present, the principal should only receive what they need to know and nothing more, as Brook suggests. This requires whittling down all available information into an easily consumable deliverable that satisfies the principal’s needs without overwhelming. There are two key questions to ask during this step:

*Do I have the needed intelligence to support the requirement?* If not, a briefer should follow the steps of the intelligence cycle until they have the requisite intelligence for the engagement.

*Do I have the needed background information on the principal?* At a minimum, a briefer should consider the context of the briefing, temporal considerations, medium of communication, and the perspective of the briefer’s organization. Ideally, the briefer should capture the preferred medium, subjects within principal’s specific portfolio, and engagement tendencies.

**Step 2: Build the brief.** In this step, a briefer should overlay the stakeholder’s equities onto the finished intelligence to identify what information is necessary to support the intelligence requirement. Key tasks for this step include:

*Synthesize information.* A briefer should identify how the principal’s equities connect to the intelligence request, determine what pieces of intelligence are needed to answer the principal’s questions, and distill the intelligence into a coherent set of key points and order by importance.

*Organize the brief.* Once a briefer has determined the key points of the message, the next step is to build the brief. Modality is of chief concern. Tailoring the brief to the receiver’s preferences is crucial to uptake of the message. The amount of time available will determine how much information to include.

However, briefers should remain flexible and be careful not to let the structure of the brief override the purpose of the engagement. Ultimately, briefers are there to support a principal and should be prepared to improvise and abandon a predetermined structure if it fails to result in uptake of the intelligence.

**Step 3: Red team the brief.** After building the brief, briefers should stress test it through “red teaming.” This process provides ample feedback to the briefer to refine and improve the final product. Red teaming allows a briefer to enter an engagement confident they can react appropriately to a principal’s needs and concerns while openly acknowledging any flaws in the intelligence or analysis. Specifically, an effective briefer will do these three things while red teaming:

*Anticipate questions and reactions.* To be effectively prepared for an engagement, the briefer must think ahead to how the principal will respond to the brief. If questions may result from lack of clarity, the briefer should refine the
message to make the information easier to digest. If the principal may not like the information presented, the briefer should prepare for those negative reactions.

**Assess language.** Briefers should take steps to remove exclusionary language and limit jargon. If possible, use terms and concepts familiar to the principal. This demonstrates familiarity with their context. Additionally, briefers should make sure to support any claims made and should use qualifying language to convey any uncertainty.

**Address weak points and gaps.** Red teaming will reveal any holes or deficiencies in the draft brief, giving briefers one final opportunity to fill them before entering an engagement. This process is the most important because weak points and gaps reflect an inferior intelligence product.

**Phase 2: Engagement**

These action items deal with the actual interaction between briefer and principal.

**Step 1: Open the engagement.** Briefers should begin engagements with actions to level set the agenda and expectations, in addition to connecting with the principal. Key tasks for this step include:

**Define purpose.** The briefer should set the stage with the principal on the purpose, scope, and any required outputs of the engagement upfront. This assists the briefer in grounding the message and assists the principal in framing this single engagement in their potentially broad and deep portfolio.

**Set context and relevance.** Beyond establishing the purpose of the engagement, the briefer should seek to connect the intelligence to the decision-making equities of the principal.

While this may seem trivial, it ensures the briefer and decision maker begin the engagement on the same page. If the principal disagrees with the context or relevance, the briefer should determine whether they have created the right product and whether it is appropriate to continue the interaction.

**Emphasize key points.** The briefer should establish the key takeaways up front and provide a general roadmap on how the engagement will support those takeaways.

**Step 2: Assess reactions.** Throughout the interaction, the briefer should actively evaluate the principal’s level of attention and reception to the communication method. The briefer must be receptive to principal’s verbal and non-verbal feedback and be ready to adapt if the original strategy fails. Failing to pick up on those signals risks broader miscommunication that may render the whole engagement ineffective.

**Shift the plan.** If the communication strategy does not produce desired results, the onus is on the briefer to adapt their approach.

**Be prepared for adversity.** If the engagement begins to fall apart, the briefer should maintain a professional demeanor and present the key points, answering any questions honestly.

**Step 3: Conclude the engagement.** Upon finishing the main presentation, the briefer should leave opportunities for the principal to ask any follow-up questions. The briefer should also restate the key takeaways. This helps briefer gauge the principal’s understanding of the information presented. It also allows the briefer to answer a critical question posed by GEN (ret.) Dempsey: “What can’t they come away believing?”
Our findings highlight how successful communication of intelligence encompasses more than providing facts to a principal. An effective briefer will have researched the context and relevance of the intelligence to the briefer and be prepared to acknowledge the limits of their knowledge. Their message will be concise and tailored to principal’s preferences in a professional manner. Overall, a successful briefer applies analytic rigor to the intelligence and the principal, gives honest answers, and empathizes with the intelligence consumer.

The recommendations outlined in this report can aid intelligence professionals tasked with preparing briefings in an unfamiliar setting. Follow-on surveys will be necessary to measure the impact of our recommendations. Disseminating our recommendations to new intelligence professionals throughout the IC and surveying their reactions to the material can provide LAS with data to test our findings. The lab may also pursue further studies into the specific challenges the IC faces in briefing principals.

Though our findings, recommendations, and action items illustrate both how to become an effective communicator and how to carry out a successful engagement, they still have several limitations and challenges.

**Methodological Limitations**

Because our approach to qualitative research uses a phenomenological approach to find thematic insights, it is not appropriate to generalize the findings. Furthermore, the project has a narrow scope focused on just the communication of intelligence. We view communication as a component of dissemination, but the findings and recommendations do not necessarily apply to all forms of dissemination. Therefore, we recommend future testing of the model as well as a survey to gauge reactions and responses to these findings from multiple levels of intelligence professionals. See Appendix H for a sample survey.

The lack of demographic diversity among our interview subjects may skew some of our findings. The industry professionals we interviewed were disproportionately white and male with decades of experience. Though our sampling approach attempted to balance the diversity of position with demographic diversity (e.g., gender, race, age), the constraints created by COVID-19 impacted our respondent pool. Further studies should seek out additional insights and perspectives from people of color and individuals who do not identify as male.

Relatedly, understanding how bias affects communication is important to the field. However, our research scope and methodology are inappropriate to adequately study this factor in any meaningful depth. We strongly recommend additional inquiry into the impact that receiver bias has on communication engagements.

**Limitations with Principals**

The findings and recommendations outlined in this report focus exclusively on how briefers can become more effective communicators. However, there are limitations associated with principals that this report does not address. Some decision makers do not know what exactly they are looking for or how they prefer to have information presented to them. In these situations, it can be difficult for a briefer to cut through to the principal, increasing the risk of an ineffective engagement.

Among the best and most senior leaders, many actively employ some sort of feedback.
mechanism to help their briefers improve. While this appears to be common practice among successful decision makers, this level of engagement might not be standard among all officials. We recommend that principals give active feedback and constructive criticism to improve briefers’ communications skills. Additionally, organizations should normalize the process of giving and receiving feedback following engagements.

**Challenges in the IC**

Because the IC is a diffuse amalgamation of organizations with disparate norms, standards, and tendencies, standardizing the intelligence communication process may prove difficult. Each agency’s maintenance of its own culture coupled with institutional inertia makes paradigm shifts more complicated.

Our recommendations are also time intensive and place a heavy burden on the briefer. Following the steps and action items in both the model and flowchart increases the probability of a successful engagement and reduces organizational stress in the long run. Our recommendations do, however, assume that the briefer has the bandwidth to dedicate to preparation that may not exist in situations involving an exigent decision. Because of this limitation, introducing additional steps to the communication process—and, by extension, the intelligence cycle—may receive pushback from intelligence professionals.

However, we believe a frontloaded, comprehensive approach to preparing for engagements with senior leaders can result in a net smaller time investment by reducing the number of follow-ups needed. Future studies can test the impact of our recommendations on the amount of time spent on engagements from initial request to conclusion.

To maximize the effectiveness of our recommendations, the IC—particularly the DOD—needs to shift how it prepares analysts. The current training curriculum prioritizes intelligence analysis over intelligence communication. Culturally, the IC tends to eschew a deliberate focus on communication because analysts prefer to let the intelligence speak for itself. While thorough analysis trumps communication, both are necessary components of an effective engagement. There must be opportunities to hone communications skills.
Appendix A: The Intelligence Cycle

The Six Steps in the Intelligence Cycle

The Intelligence Cycle is the process of developing raw information into finished intelligence for use by policymakers, military commanders, and other consumers in decisionmaking. This six-step cyclical process is highly dynamic, continuous, and never-ending. The sixth step, evaluation (which includes soliciting feedback from users) is conducted for each of the other five steps individually and for the Intelligence Cycle as a whole.

The six steps that constitute the Intelligence Cycle are as follows:
Appendix B: Nine Analytic Tradecraft Guidelines

1. Properly describe quality and credibility of intelligence (sources, data, and methodologies)
2. Properly express uncertainty
3. Properly distinguish between underlying intelligence and analysts’ assumptions and judgments
4. Incorporate analysis of alternatives
5. Demonstrate customer relevance and addresses implications
6. Use clear and logical argumentation
7. Explain change to or consistency of analytic judgments
8. Make accurate judgments and assessments
9. Incorporate effective visual information where appropriate
Our team used a purposive sampling method to identify participants for inclusion in our study. This approach grouped participants “according to preselected criteria relevant to a particular research question.” Our project categorized the industry professionals into four bins: military, legislative, executive, and non-government.

- The **military bin** consists of professionals who have served in the U.S. military and/or worked in the DOD.
- The **legislative bin** consists of professionals who have worked in or with Congress. Intelligence briefings in this bin can be directed at a group of decision makers, such as a committee.
- The **executive bin** consists of professionals who have experience working in government agencies outside of the DOD.
- The **non-government bin** includes think tanks, non-governmental organizations (NGOs), and private companies. These professionals have experience in crisis management and time-condensed decision-making.

Our initial goal was to interview between 16 and 28 intelligence professionals and policymakers. We organized our interview list based on prospective interviewees’ previous positions that were most relevant to our project. Our recruitment strategy for participants combined professional networks at LAS, the Sanford School of Public Policy, and the Fuqua School of Business with team member connections to relevant individuals. Where our team lacked personal relations, we utilized LinkedIn to cold-contact interviewee candidates. This approach proved effective as the team conducted 18 interviews.

### Interview Questions

Our interview questions focused on specific parts of the interaction between information purveyor and decision maker. See Appendix E for the complete interview guide, which consists of the questions, follow-up questions or prompts, and the purpose. We developed these questions from the literature and discussions with two industry professionals.

We first spoke to Dr. Rob Johnston, an anthropologist whose ethnographic work, *Analytic Culture in the Intelligence Community*, is widely considered a foundational examination of the CIA. His insights were especially instructive as he conducted almost 500 interviews with members of the IC and leadership for his monograph. Our conversation illuminated techniques for connecting with our audience prior to beginning the interview, methods to generate honest perspectives from participants, and importantly, how to best structure questions for our topic.

Next, Duke Professor Tim Nichols offered our team a useful problem framing paradigm. Our questions thus fall into three broad categories: modality, characteristics, and systems/techniques. Modality refers to the ways in which the individuals best receive information. For instance, is it through text, presentation, or a conversation? Characteristics refers to the components that a gifted communicator has that enable their transmission of complex information. Systems/techniques refers to the processes by which the communication process was improved. With these interview question bins identified, we developed our interview guide to
ask specific questions that elicit responses aligned with these categories.

**Capture Methods**

An interview “team” at a minimum consisted of an interviewer and recorder. The interviewer served as the primary speaker asking questions, offering verbal and non-verbal affirmations of responses, and beginning and ending the interview. The recorder transcribed notes of the interview and communicated missed questions or topic gaps to the interviewer. At the end of each interview, the interviewer would prompt the recorder to summarize the key points discussed during the interview, as well as ask amplifying or further questioning in direct support of the topics covered. Other team members in attendance supported the recorder but maintained a low profile to respect the process.

Prior to each interview, we requested to record the interview using the transcription service Otter.ai. Regardless of approval, the recorder still transcribed detailed notes during the interview. Each interview lasted approximately 45 minutes, with the exact length dependent on the availability of the interviewee, the pace of the conversation, and the coverage of questions asked.

We captured reflections following each interview in a short memo that served as the first stage of our analysis. The purpose of this document was to codify specific aspects of the interview not readily evident through the transcripts that could add context to the coding process. Each memo started with a brief synopsis of the interview. Examples of observations include interview pace, mood of interviewee, or quality of rapport. Following the transcription of the interview notes, the interviewer emailed the interviewee with the transcript of the interview to allow for clarification and to verify that we properly captured their responses.

**Interview Analysis and Coding**

We conducted interview analysis using an iterative process. The team hand coded the interviews prior to uploading to NVivo for data management.

There are three general approaches to coding qualitative research: deductive, inductive, and abductive. Our team used the inductive approach to coding because it allowed us to build codes as they emerge from the data. This method allowed us to assign conceptual significance to insights from the interviews. Our team followed a seven-step coding process:

- **Step 1: Transcribe interview.** Use Otter.ai or similar platform to turn audio file into text. The final text product should be on a Microsoft word document.

- **Step 2: Clean the data.** The interview text needs to be cleaned, meaning that the text is compared to the audio recording to check for accuracy. At this stage, the coder will fix errors (misprints, gaps, or duplication) while ensuring they do not add or subtract from the exact wording of the participant. Also, the text should be displayed so that the interviewer and interviewee speech is divided by two sentences and clearly marked as “Interviewer” and “Interviewee or individual name” (if given permission by participant). The file should then be named using the convention “subject name_interviewee category_Date_interviewer.”

- **Step 3: Upload to NVivo.**

- **Step 4: Descriptive coding.** This approach assigns a label to words or phrases that captures the essence of the response as it relates to the research question. The coding should be done separately by two individuals to ensure that codes assigned accurately represent
the intent and description of the subject interviewed. A sentence or phrase may be coded into different nodes if the content applies to multiple descriptions.

- **Step 5: Build child codes.** As the categories grow, there will be information that may require further categorization. In this instance, child codes should be built. A child code is simply a further description of a bigger topic. For instance, if a code used is “values,” child codes could be “trust, respect, honor.”

- **Step 6: Thematic coding.** After the interviews are descriptively categorized, the thematic coding portion can be applied to specific aspects determined to have value. This portion requires group consensus on which portions of the interviews contain rich data which can generate themes. Themes are used synonymously with findings or insights here. That is, what do the industry professionals state (either explicitly or implicitly) are components that answer our research question.

- **Step 7: Cross-reference codes.** This last step evaluates the codes to ensure that we do not have similar codes that could be combined, or perhaps need to rename a code for a more accurate term.

We applied an iterative process to our content analysis using two techniques. First, our project was well suited for the **descriptive coding** technique as the beginning exploratory code. Our units of analysis were a mix of words or short phrases that we clustered together using broad descriptors. Next, we incorporated a **theming the data** approach to analyzing the responses. Here, we parsed out thematic elements from our descriptors into larger overarching categories.24
## Appendix D: List of Industry Professionals

### MILITARY

<table>
<thead>
<tr>
<th>NAME AND TITLE</th>
<th>RELEVANT POSITION</th>
<th>STATUS</th>
<th>INTERVIEW DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lieutenant Colonel Timothy Nichols</td>
<td>Intelligence Officer, United States Marine Corps</td>
<td>Retired</td>
<td>Sept. 24, 2020</td>
</tr>
<tr>
<td>Colonel Matt Ross</td>
<td>Counterterrorism and Public Policy Fellow</td>
<td>Active</td>
<td>Nov. 9, 2020</td>
</tr>
<tr>
<td>General Martin E. Dempsey</td>
<td>Chief of Staff of the United States Army</td>
<td>Retired</td>
<td>Nov. 12, 2020</td>
</tr>
<tr>
<td>Brigadier General J. Patrick Work</td>
<td>Deputy Commanding General 82nd Airborne Division; former Sec. Def. Briefer</td>
<td>Active</td>
<td>Nov. 20, 2020</td>
</tr>
<tr>
<td>Major General Gregory J. Mosser</td>
<td>Commander of the 377th Theater Sustainment Command</td>
<td>Active</td>
<td>Feb. 1, 2021</td>
</tr>
<tr>
<td>Douglas A. Brook</td>
<td>Assistant Secretary of the Navy</td>
<td>Retired</td>
<td>Feb. 8, 2021</td>
</tr>
<tr>
<td>Colonel Jack Einwechter</td>
<td>Military Intelligence and Judge Advocate General's Corp</td>
<td>Retired</td>
<td>Feb. 12, 2021</td>
</tr>
<tr>
<td>Lieutenant General Flora Darpino</td>
<td>39th The Judge Advocate General (TJAG), U.S. Army</td>
<td>Retired</td>
<td>Feb. 19, 2021</td>
</tr>
</tbody>
</table>

### LEGISLATIVE

<table>
<thead>
<tr>
<th>NAME AND TITLE</th>
<th>RELEVANT POSITION</th>
<th>STATUS</th>
<th>INTERVIEW DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Representative Loretta Sanchez</td>
<td>Former U.S. Representative, California’s 46th District</td>
<td>Retired</td>
<td>April 2, 2021</td>
</tr>
</tbody>
</table>

### EXECUTIVE

<table>
<thead>
<tr>
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<th>RELEVANT POSITION</th>
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<th>INTERVIEW DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Rob Johnston</td>
<td>Director of Lessons Learned, Office of the Director of National Intelligence</td>
<td>Retired</td>
<td>Sept. 25, 2020</td>
</tr>
<tr>
<td>Sue Gordon</td>
<td>Principal Deputy Director of National Intelligence</td>
<td>Retired</td>
<td>Jan. 27, 2021</td>
</tr>
<tr>
<td>Andy Vail</td>
<td>Senior National Intelligence Service Officer</td>
<td>Active</td>
<td>Feb. 2, 2021</td>
</tr>
</tbody>
</table>

### NON-GOVERNMENT

<table>
<thead>
<tr>
<th>NAME AND TITLE</th>
<th>RELEVANT POSITION</th>
<th>STATUS</th>
<th>INTERVIEW DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tom Allin</td>
<td>Chief Executive, Jollibee Foods Corporation</td>
<td>Retired</td>
<td>Sept. 18, 2020</td>
</tr>
<tr>
<td>Bob McDonald</td>
<td>Biden Campaign 15-Person Advisory Board; Former CEO Proctor &amp; Gamble</td>
<td>Active</td>
<td>Sept. 28, 2020</td>
</tr>
<tr>
<td>Scott Blackburn</td>
<td>Partner, McKinsey &amp; Company</td>
<td>Active</td>
<td>Dec. 3, 2020</td>
</tr>
<tr>
<td>J.R. Maxwell</td>
<td>Partner, McKinsey &amp; Company</td>
<td>Active</td>
<td>Feb. 8, 2021</td>
</tr>
</tbody>
</table>
Appendix E: Interview Questions

Question 1:
“What is your preferred method to absorb information that is unfamiliar to you? How are you best ‘brought up to speed’ on an issue?”

- **Purpose:** How does the interviewee think about/prioritize the modality of communication?
- **Potential Follow-up Questions:**
  - How did you arrive at this modality as your preferred choice? Was it always this way?
  - Do you always rely on this modality? What determines that change?

Question 2:
“Describe how you would characterize an effective information disseminator.”

- **Purpose:** How do you define a successful intelligence communicator? What are the characteristics of a good communicator? How do you get to wrong, and who failed when it’s wrong? We are searching for an emotional response or an anecdote.
- **Potential Follow-up Questions:**
  - Who comes across as a good briefer or presenter of information?
  - Describe a time when you worked with a good communicator.

Question 3:
“If you were to characterize a briefer as someone who learns you, how would you describe that process?”

- **Purpose:** What are the best practices for a decision maker to ensure information briefers are delivering the mail? Are they providing what they need?
- **Potential Follow-up Questions:**
  - What system do you build to ensure briefers/information preparers know how to best serve you?
  - Does it or did it ever change?
  - Has the information process ever not provided you with the necessary information in the right format?
  - If so, how do you address it?

Question 4:
“What else about the process should we know?”

- **Purpose:** This freeform question allows respondents to provide insights that they didn’t connect to the other questions but may be pertinent to the research question overall.

**Probes / Broader Questions:**
- Why did you think that happened?
- Why is that important?
## Appendix F: Findings Table

<table>
<thead>
<tr>
<th>Category</th>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Characteristics</strong></td>
<td>Preparedness</td>
<td>Has researched and synthesized the relevant information (both intelligence analysis and consumer context) needed to facilitate an effective engagement.</td>
</tr>
<tr>
<td></td>
<td>Credibility</td>
<td>Conveyed both their understanding of the intelligence and their awareness of the limits to their knowledge.</td>
</tr>
<tr>
<td></td>
<td>Flexibility</td>
<td>Can adapt to both the continuous updates to intelligence and the reactions/ sudden enquiries of the consumer during the briefing.</td>
</tr>
<tr>
<td></td>
<td>Confidence</td>
<td>Maintained a professional demeanor during the briefing regardless of the consumer’s temperament, understanding of the intelligence or unexpected questions.</td>
</tr>
<tr>
<td><strong>Considerations</strong></td>
<td>Context</td>
<td>Concisely explained the circumstances surrounding the intelligence. Provided relevance to the facts of an intelligence briefing.</td>
</tr>
<tr>
<td></td>
<td>Time</td>
<td>Aware of the time allotted by the consumer, place of the briefing within the consumer’s schedule and clearly defines the time frame a consumer can act on the presented intelligence.</td>
</tr>
<tr>
<td></td>
<td>Modality</td>
<td>Balanced the principal’s preferences for receiving information with their own constraints on conveying it.</td>
</tr>
<tr>
<td></td>
<td>Organizational</td>
<td>Identified then prioritized the key points from the intelligence while avoiding specific pitfalls that could derail the engagement or the consumer’s understanding of the intelligence.</td>
</tr>
<tr>
<td><strong>Conventions</strong></td>
<td>Ensure Message Clarity</td>
<td>Created a concise message focused on making the information accessible to individual consumers.</td>
</tr>
<tr>
<td></td>
<td>Deliver Penetrating</td>
<td>Presented intelligence in a way that generated interest, held attention, did not use jargon, and tied back to relevance.</td>
</tr>
<tr>
<td></td>
<td>Message</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Earn Trust</td>
<td>Acknowledged limitations to the consumer, maintained neutrality and anticipated questions.</td>
</tr>
<tr>
<td></td>
<td>Tailor Communication</td>
<td>Empathized with the consumer, learned their unwritten rules, only communicated what they need to know and nothing more, and planned for reciprocity.</td>
</tr>
<tr>
<td></td>
<td>Strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Identify Anchor</td>
<td>Established key points of the intelligence and was prepared to communicate them at a moment’s notice.</td>
</tr>
</tbody>
</table>

29 Communicating Intelligence to Decision Makers
## Appendix G: Communication Strategy Checklist

### Phase 1: Crafting the Message

#### Step 1: Determine Relevant Information

<table>
<thead>
<tr>
<th>Collect and Analyze Intelligence</th>
<th>Where does the intelligence fit within the principal’s current profile?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Does the principal require additional context surrounding the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Is a decision imminent/required?</td>
</tr>
<tr>
<td>Build a Profile of the Principal</td>
<td>Can you contact the principal’s staff about their preferred modality?</td>
</tr>
<tr>
<td></td>
<td>Will there be anyone else in attendance at the briefing?</td>
</tr>
<tr>
<td></td>
<td>What are the top three concerns of the principal for that day/week?</td>
</tr>
<tr>
<td></td>
<td>What is the proximity of the principal’s last engagement to your brief?</td>
</tr>
<tr>
<td></td>
<td>What is the proximity to the principal’s next engagement after your brief?</td>
</tr>
</tbody>
</table>

#### Step 2: Build the Brief

<table>
<thead>
<tr>
<th>Synthesize Inputs</th>
<th>What are the key points of the intelligence?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do you have no more than three key points?</td>
</tr>
<tr>
<td></td>
<td>What information should you know but not directly included in the brief?</td>
</tr>
<tr>
<td></td>
<td>Have you identified any information gaps in the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Have you prepared a one-page leave-behind document?</td>
</tr>
<tr>
<td>Organize Brief</td>
<td>Have you confirmed the time allotted for the brief?</td>
</tr>
<tr>
<td></td>
<td>Have you confirmed the location of your briefing?</td>
</tr>
<tr>
<td></td>
<td>Have you developed a contingency plan for if the engagement ends prematurely?</td>
</tr>
<tr>
<td></td>
<td>Have you organized the brief in a way that the principal can absorb and act on the intelligence?</td>
</tr>
</tbody>
</table>

#### Step 3: Red Team the Brief

<table>
<thead>
<tr>
<th>Anticipate Questions</th>
<th>Do you understand the context of the intelligence outside the key points?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Are there any external current events related to the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Has a colleague prepared possible questions for you to answer?</td>
</tr>
<tr>
<td>Assess Language</td>
<td>Does the language in your brief project confidence?</td>
</tr>
<tr>
<td></td>
<td>Could your language or intonation be interpreted as condescending?</td>
</tr>
<tr>
<td>Address Gaps and Weak Points</td>
<td>Have you reviewed all the facts stated within the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Have you clearly stated the assumptions built into the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Have you prepared an answer for questions outside the scope of your knowledge?</td>
</tr>
<tr>
<td>Refine Message</td>
<td>Have you cut all superfluous information from your briefing?</td>
</tr>
<tr>
<td></td>
<td>Do all parts of your briefing connect to the key points and interests of the principal?</td>
</tr>
<tr>
<td></td>
<td>Does your brief clearly explain your analysis of the intelligence?</td>
</tr>
<tr>
<td></td>
<td>What can the principal not walk away from the briefing believing?</td>
</tr>
</tbody>
</table>
# Phase 2: Engagement

## Step 1: Open the Engagement

<table>
<thead>
<tr>
<th>Define Purpose of Engagement</th>
<th>Does the principal seem to understand the reason for the briefing?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have you clearly stated your purpose at the start of the briefing?</td>
</tr>
<tr>
<td></td>
<td>Have you avoided using any jargon when defining the purpose of the engagement?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Connect to Stakeholder Equities</th>
<th>Have you stated how your briefing supports the principal’s interests?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have you given the principal opportunities to engage you on the intelligence?</td>
</tr>
<tr>
<td></td>
<td>Can you connect the intelligence to any of the principal’s current endeavors?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Emphasize Key Points</th>
<th>Have you clearly stated your key points at the start of the briefing?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If the principal must suddenly end the briefing, will they be able to walk away knowing your key points?</td>
</tr>
</tbody>
</table>

## Step 2: Assess Reactions

**IF APPLICABLE**

<table>
<thead>
<tr>
<th>Employ New Communication Strategy</th>
<th>Can you identify any specific point the principal is not internalizing?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have you given the principal a chance to ask questions about the intelligence?</td>
</tr>
</tbody>
</table>

## Step 3: Conclude the Engagement

<table>
<thead>
<tr>
<th>Summarize Key Takeaways</th>
<th>Have you connected the intelligence and analysis to your key takeaways?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have you emphasized these takeaways separate from the rest of the briefing?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Answer Outstanding Questions</th>
<th>Have you directly answered what the principal is asking?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If the principal asks a question you cannot answer, do you have a plan to follow-up with an answer after the briefing?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gauge Principal’s Understanding</th>
<th>Can you ask the principal if they can act on the intelligence?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have you given the principal ample opportunity to ask questions about either the intelligence or analysis?</td>
</tr>
</tbody>
</table>
Communicating Intelligence to Decision Makers

Survey

The survey encompasses a short questionnaire with four possible responses to each question. Keeping the survey short encourages intelligence officials to take the time to participate. The four possible qualitative responses allow participants to summarize their reactions to the report findings. The responses also allow researchers access to quantitative data they can use to measure the effectiveness of the study.

1. The report’s research identified that the IC did not provide sufficient training in how to communicate intelligence to decision makers.

   Disagree  Indifferent  Agree  No Answer

2. I can apply the report’s Characteristics (preparedness, credibility, flexibility, and confidence) to improve the quality of my intelligence briefings.

   Disagree  Indifferent  Agree  No Answer

3. I can apply the report’s Considerations (context, time, modality, and organizational perspective) to improve the quality of my intelligence briefings.

   Disagree  Indifferent  Agree  No Answer

4. I can apply the report’s Conventions (ensuring message clarity, delivering a penetrating message, earning trust, tailoring communication strategy, and identifying the anchor) to improve the quality of my briefings.

   Disagree  Indifferent  Agree  No Answer

5. The Characteristics, Considerations and Conventions (the three Cs) outlined in the report helped improve my briefing and I would recommend these findings to a new intelligence professional.

   Disagree  Indifferent  Agree  No Answer

Any analysis regarding the results of these survey results would require a sample size of approximately 150 participants. This sample size could allow researchers enough information to measure the impact of the report and determine on the direction of LAS’s future research.
Endnotes


5 “Intelligence Community Directives.”


24 Ibid.