01 / REUSABLE TASK BRIEF

The Manager Brief

Three questions to agree the outcome, limits and first check-in.

Employee: clarify the ask. Manager: brief the work. Fill this in together.

Type in the boxes or print. Save a fresh copy for each task; keep entries short.

Task / project

Owner + manager

1 Outcome

What would a good result look like?

Deliverable + format + what good looks like

Who needs it, and what decision will it support?

2 Constraints

What should I keep in mind, and what should I not spend time on?

Final deadline / time / time zone

Priority / what moves to make room?

In scope / sources to use / leave out / approvals needed

3 Check-in

When should I show you a first version?

First version: when, what to show, who reviews, and where

Before starting: confirm the three answers. Mark unknowns as provisional.

A missing reply is not approval for spending, sensitive data or irreversible work.

02 / WORKED EXAMPLE + WORDS TO USE

Less guessing. Better brief.

A fictional example adapted from Episode 1. Use the structure, not the details.

THE VAGUE ASK

"Put together something on the western region numbers."

1 Outcome

A short note on Ahmedabad delivery delays for the manager's Tuesday review. Answer: are delays getting better or worse?

2 Constraints

Use the shared tracker. Ahmedabad only. Do not rebuild the dashboard or contact regional heads. Confirm the final deadline and what moves if this takes priority.

3 Check-in

Show a rough draft on Monday afternoon. Confirm the exact time, review channel and who will respond before treating the checkpoint as agreed.

THE READ-BACK

"I'll prepare a short Ahmedabad note from the tracker for your Tuesday review, without rebuilding the dashboard. Can we agree a time on Monday to check the rough draft, and what should I deprioritise?"

When the conversation gets tricky

They are rushed	"I can start with [format + scope]. Is that the right direction?"
Everything is urgent	"To deliver [A] by [time], should [B] move or should we reduce scope?"
The ask stays vague	"Which decision should this help you make? What can we test first?"

Typing? Use a form-enabled PDF reader and save a copy. Print pages 1 and 3 to reuse.

Use approved work systems. Remove client names and sensitive details before sharing examples.

03 / REUSABLE CHECK-IN + RESET

Keep the brief alive.

Use at the first draft, when the ask changes, or before final handover.

Task / project

Review date / time

1 Check the direction

Compare the draft with the agreed outcome, not just the effort spent.

What did we review? Link / version / what is ready

What is on track? What needs changing?

2 Reset the agreement

If the ask changed, name the trade-off before adding the work.

New request / what changed / who confirmed it

Effect on scope, time or priority / what will move

Next action + owner

Next checkpoint / final deadline

SEND THE RESET

"We agreed [change]. I'll deliver [version] by [time]. To do that, [trade-off]. Please confirm before I commit to the changed plan."

Close the loop

Final version / accepted by / date / one lesson for next time