

## Introduction

There is little debate that communication about analysis—whether referred to more generally as Dissemination, Integration, or some other term—is a crucial phase in the intelligence cycle. No matter how good an analysis is, it must still be communicated to make impact. This dimension of analysis provides a leverage point upon which building a more resilient, or more brittle, intelligence analysis process hinges.

The class of communications of particular relevance to our focus are those person-to-person interactions that traditionally occur with the primary intent of information transfer—a class of interactions that we refer to as “Briefing Interactions” in the sense that one party is being “briefed” about the analysis produced by another party.

In the context of this discussion, Briefing Interactions include many interaction events common to the intelligence community—from a junior analyst discussing with a senior how new data fits into a bigger picture, to a supervisor presenting critical intelligence findings to a decision maker, to an expert analyst sharing new information and insights with a group of peers in response to a changing world—these “briefings” are unified in that the goal of the interactions, traditionally, is to transfer information about some product of an analysis process.

Our perspective is:

1. The Briefing Interaction is a “leverage point” for process improvement.
2. There is an opportunity to change the nature of communication interaction by changing the model for successful information transfer from...
  - i. One based on persuasive speaking to conversational dialog.
  - ii. Static Presentation format to a Dynamic Conversation.
  - iii. A concluding occurrence to a landmark event in an iterative cycle.
3. Framing the Briefing Interaction as a Participatory Exchange...
  - i. Will not just happen, but requires a fundamental change.
  - ii. Is supported by tools like the Participatory Process View.
4. Key insight: The briefing as an opportunity to align perspective.

## Setup for Our Presentation

As the name implies, the Participatory Exchange is a presentation forum that is constructed by the analyst, but driven by the active participation and feedback provided by the audience. A Briefing Interaction becomes “participatory” in the sense that both the Briefing Analyst and Audience Participants contribute to the development of the Briefing Interaction. The Interaction becomes an “exchange” through a two way transfer of perspective understanding, rather than a one way transfer of information.

## **Traditional Model**

In understanding the Participatory Exchange as a model, we first contrast it with the Traditional Model of Briefing Interactions. The Traditional Model can be typified as a standard meeting presentation — where the focus of all interactions is on ensuring the successful transfer of a central message. This approach, however, largely ignores the significant role that feedback plays as an input to re-tasking, the counterpart of the analytical product. By framing Briefing Interactions as Participatory Exchanges, the criticality of this link is emphasized.

This nuance highlights how the Participatory Exchange Model is fundamentally different. While the Traditional Model frames interactions as being almost exclusively about information transfer, the participatory model reframes these interactions as collaborative and interactive exchanges of perspectives among participants.

Thus, the insight from this model comes through the recognition that it is not only critical for the Audience to understand the perspective of the Briefer, but it is also critical for the Briefer to understand the perspectives of the Audience.

## **The Participatory Exchange**

In response to this insight, the Participatory Exchange adopts an alternative success model for communication about intelligence analysis. In the Participatory Exchange, effective conversation becomes the model for success, rather than persuasion. As a result, successful briefings are defined by the convergence of perspectives among stakeholders.

In a Participatory Exchange, stakeholders are conceptualized as Briefing Analysts and Audience Participants. Within the model, the critical difference between the groups is their perspective on the cycle of intelligence analysis as a form Cognitive Work.

In representing Cognitive Work as the interaction between Analysis and Re-Planning, the Briefing Analyst characterizes stakeholders who have the process of Analysis, which is in the foreground of their focus, occurring on a background of Re-Planning.

In contrast, Audience Participants—be they Decision Makers, Supervising or Senior Analysts, or even peer Analysts—represent stakeholders who have Re-Planning at the center of their focus. For them, analysis instead composes the secondary background on which primary re-planning decisions are made.

Because the interaction is defined by the analyst, but developed by the audience, a Participatory Exchange plays out more like a conversation—or talking WITH an audience—than a formal presentation, in which a speaker is talking AT an audience—just as I'm doing right now, ironically enough.

In any case, while the Traditional Model frames interactions as marking the conclusion of an analysis process, the Participatory Exchange Model frames these interchanges as Landmark Events in the ongoing, iterative cycle of intelligence analysis. As a result, the Briefing Interaction becomes not only a tool for supporting re-tasking, but also an opportunity for the emergence of novel analytical insights.

Moreover, the Participatory Exchange Model, unlike the Traditional Model, supports the ability of both analyst and audience to visualize and understand the rigor of a process.

The implication then, is that the audience does not end a presentation simply with a memory of a few main points, but rather they develop an understanding of an analysis in relation to their own goals and interests. Concurrently, briefers develop a better understanding of how their analysis fits within a broader re-planning context.

In addition to the contrasts just mentioned, there is both empirical and academic support for the Participatory Exchange as a promising model of the Briefing Interaction.

### **Other Support for the Participatory Exchange**

Most notably, a number of analysts from different organizations commented that their best and most effective briefings were, in fact, events more similar to conversational dialogs than to formal presentations. This observation parallels the feedback we received in our recent LNG Scenario Walkthrough study Exploring Rigor in Intelligence Analysis, as the vast majority of analysts we interviewed preferred face-to-face interactions as a method for developing an understanding of analytic process.

Additionally, constructing Briefing Interactions as Participatory Exchanges is an approach aligned with the Laws of Cognitive Work—particularly the Laws of Adaptation and the Laws of Collaboration. As noted previously, the Participatory Exchange creates an interaction in which the goals of all participants are more closely coupled and one in which the balance of primary and secondary focuses, or analysis vs. re-planning, are better understood.

Given the support for the Participatory Exchange as a promising model for re-envisioning Traditional Briefing Interactions, the next critical questions we addressed as a group are “What does it mean to setup a Participatory Exchange?” and “How do you go about constructing one?”

### **Defining Characteristics of a Participatory Exchange**

We identified three factors that begin to define what it is to have a Participatory Exchange: Roles of Participants, Phases of the exchange, and Goals of the interaction.

### *Roles of Participants: Briefing Analyst & Audience Participants*

In defining a Participatory Exchange, it is important to note that the roles of the participants—both briefer and audience—vary significantly from those in the Traditional Model. In a standard briefing, the analyst's role is almost exclusively that of the message sender, while the role of the audience is as passive recipient of that message.

In the Participatory Exchange, the Briefing Analyst has many roles in addition to primary speaker. Most importantly, the Briefing Analyst serves as a guide. Rather than talking AT the audience about an analysis, the briefer navigates participants through the information space behind the analysis, based on collaborative interactions WITH them. In the Participatory Exchange, the Audience also has a markedly different role, as reflected in their description within the model as Audience Participants. As such, the audience becomes a more essential part of the Briefing Interaction, playing a central role in shaping its development. It is this difference in roles that sets the stage for a remarkably different interaction.

### *Phases of Briefing Interaction: Traditional Model vs. Participatory Exchange Model*

Briefings that follow a Traditional Model typically share a standard format. In particular, they tend to follow a highly linear organizational structure. Often, they begin with an Introduction to the topic being briefed, progress through the main points making up the Body of the presentation, and end with a Conclusion that summarizes what was presented by identifying a few take home messages. A Participatory Exchange, in contrast, occurs through a very different sequence of key events.

The first phase in a Participatory Exchange is the Setup. The Setup gives the Briefing Analyst an opportunity to set the stage on which the Briefing Interaction will occur, by defining the broader context surround the briefing, identifying the themes to be explored, and clarifying the common goals driving the interaction. This phase concludes with a Catalyst, an initial line of inquiry that sets the Exchange into motion.

The next phase of the exchange—topic Exploration—is defined by the discussion of the relevant facets of an analysis, as they are raised and addressed in a flow of interactions dictated by the interests and expectations of all participants.

The Participatory Exchange concludes with a Wrap Up phase, which provides the Briefing Analyst with a chance to reunite the various threads that were explored, while giving Audience Participants the opportunity to comment on how the analysis fits into a broader re-planning context.

### *Goals of a Participatory Exchange*

The final defining characteristic of a Participatory Exchange is embodied in the broader shared goals of the participants in the Briefing Interaction. While the highest level objective is always the convergence of perspectives among participants, the more

salient factor is that this goal is attained through collaborative exploration between Briefing Analyst and Audience Participants. A Participatory Exchange, then, can be defined by the extent to which active learning, reflection, and discussion occur as a product of the Briefing Interaction.

Given the many factors involved, the emerging challenge is to construct interactions that support the Participatory Exchange communication model.

### **Supporting a Participatory Exchange**

There are many ways to support the Participatory Exchange, and—although great benefits might be realized in supporting the participants—the most critical aspect, and where our group focused our development energies, is in supporting the interaction among participants.

### **The Participatory Process View**

In order for the Briefing Analyst to fully engage in the role of guide, and for the Audience Participants to fully explore an analysis process, a map of the process is required. Thus, supporting the interactions in a Participatory Exchange is about building an effective map of the process data space. Our model for mapping this data space is the Participatory Process View, as represented in the PPV Interface.

Simply put, the Participatory Process View serves as a map to the resource set of data describing the process that created an analytic product. In the Participatory Process View, building a map of an analysis process is to build an interactive space that instantiates the three dependent characteristics of having: Process, View (or Perspective), and Participation. This Hierarchy identifies the key building blocks for developing an interface to support a Participatory Exchange interaction.

### **The Participatory Exchange & Participatory Process View in Context**

In closing we see the Participatory Exchange—and supporting Participatory Process View—as a promising, innovative direction for the future of intelligence briefings. Re-conceptualizing Briefing Interactions on the success model of the conversational dialog, rather than the traditional presentation, creates a flexible framework that could be effective at many levels within the intelligence cycle.

In fact, it is probable that some form of Participatory Exchange is already done within the intelligence community in some capacity. However, it is equally probable that their are not tools to support these interactions. A better understanding of the Participatory Exchange Model allows us to design tools to better support the changing landscape of the intelligence community. So, whether the future of intelligence analysis is to be realized through revolution or evolution, the Participatory Exchange supports that future.