The morning brief's job description

Step 3 from the CA Craft Beer Summit talk, November 11. Write this before you turn a brief on. A brief that fills space every morning stops getting read, so this file says what goes in, what gets skipped, how descriptive it is and what matters most right now.

How to use it: fill in the blanks. The lines in italics are the owner's brief at Coastline, the made-up brewery from the talk. Delete them when yours is done.

Who it's for, and when it arrives

- **Who reads it:** _____ *The owner, with coffee.*
- **When, and where:** _____ *Every morning at 6:00, by email and Slack.*

What goes in

- *Yesterday across the taproom, distribution and production.*

- *Today, and what's coming up. The meeting worth prepping for.*

- *Open items, from the sales team's parking lot and the owner's task list.*

- *Industry news, each with a link.*

- *Where each initiative stands. On screen: week six of the 19.2 C-store push.*

- *Sam's leadership version.*

What matters most right now

This season's priorities, so it ranks what it finds against them. Update it when the priorities change.

What gets skipped

- *Anything that didn't change since yesterday. Anything nobody would act on.*

How descriptive it is

- *A line per item, or a short paragraph with the why. Short enough to read with coffee, the most important thing first.*
- **"Nothing needs you today" is a good answer.** Say so, and stop.

The sources, and showing them

This is habit 2 again: nothing it can't point to.

- **Start with two:** _____ *The step 1 file in a shared folder, plus the calendar.*
- **Add later, once it's earned a spot:** _____ *Taproom and production, the task list, the news.*
- **How it reaches each one, easiest first:** _____ *A shared folder: drop the exports in Google Drive or OneDrive each week, and it reads whatever's there. Connectors: your calendar, email and Slack, connected once. An API pull: for the POS or the depletion portal, a small script fetches last night's data.*
- **How each line shows its source:** _____ *Source: depletions, through Sunday. Every news item has a link.*

The schedule

This is habit 4: put it on a schedule.

- **When it runs:** _____
- **Where it runs:** _____ *In the cloud, so it goes out at 6:00 whether your computer is on or not.*
- **Run it by hand first:** _____ *A week of on-demand runs. Schedule it once you trust what comes back.*
- **What happens if a source is missing:** _____ *The brief says which source didn't come in, instead of going quiet, and sends the rest.*

Talking back to it

- **How the team tells it what it can't see:** _____ *Reply to the brief. "Fathom's down because they're remodeling. They should be back to normal in about four weeks." The next morning's brief stops flagging Fathom, and checks back in four weeks that volume is back.*
- **Where those replies get saved:** _____ *Into the context file, so every report after that knows it too.*

Other versions

Same setup, a different job description for each role.

- *Taproom manager: yesterday's sales and labor, and today's events. Head brewer: the tank schedule and anything running low. Controller: cash, open bills, and anything that won't tie out. Sales manager: each rep against goal, and accounts gone quiet.*

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