



The Consulting Process

**REPORT WRITING
PROPOSAL WRITING**

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Training outline

- **ACTION: Report or Proposal? What is the difference?**
- Common Business Reports
- Report writing from a Management's perspective
- **EXERCISE: Report order – Executive reads**
- Stages in Writing
- Planning your Report
- **CASE TABEISA: identifying TORs/ Consider All Factors**
- Organizing the information
- Building a skeletal framework

Lunch

Training outline continued

- Writing your Report – Where do you start?
- Draft
- Introduction (Scope)
- Main Body (Findings)
- Conclusions – Recommendations
- **ACTION: write a SMART Recommendation**
- Executive Summary
- Supplementary Parts
- Lay out, presentation, style of writing, use of language
- Visual Literary: how to present data?

CONCLUSIONS

REPORT OR PROPOSAL

ACTION: What is the difference?

- 1 Communication Objective
- 2 Content
- 3 Purpose
- 4 Reader
- 5 Shelf Life
- 6 Skills involved
- 7 Style of writing (language used)
- 8 TORs
- 9 Quality
- 10 Value

REPORT

- **A Report delivers against agreed TORs or tasks**
- **Normally commissioned (requested/paid for)**
- **It should 'add value' in terms of its analysis, findings or lessons learnt**
- **Objectivity is required, formal writing , analytical**
- **It is usually your main 'Product' or 'Deliverable'**
- **Should confirm to the client the reason they hired you**
- **A *good* Report can have a long 'shelf life' and can be of interest to a wider audience**
- **Gets your invoice paid!**

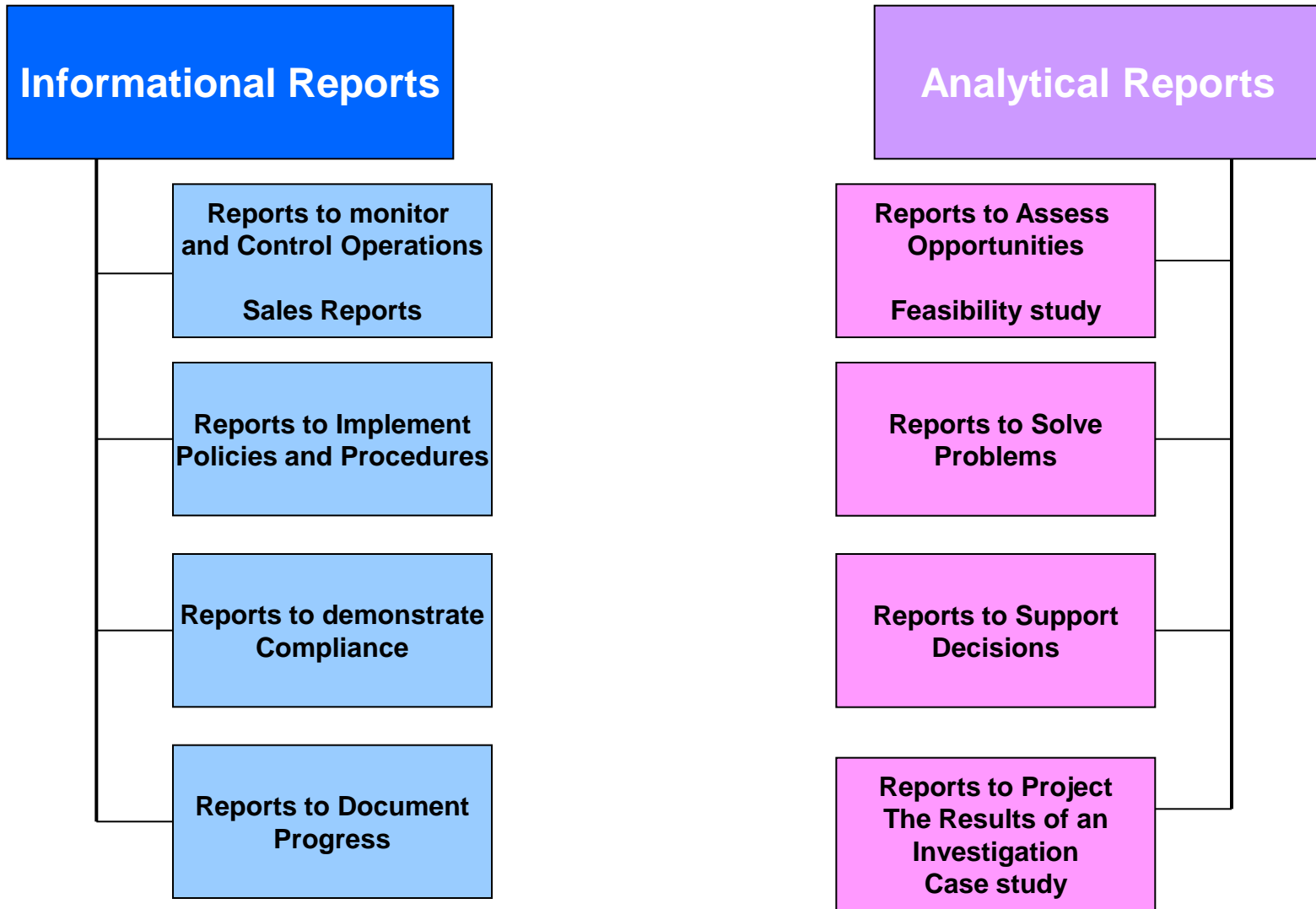
PROPOSAL

- Responds to a perceived need
- Requested (RFP) - Invitation to Tender – Bid
- Competition involved
- Normally not paid for
- Proposes how new work will be undertaken
- Persuasive
- Your Proposal should ensure the client sees the reason to talk to and hopefully hire you.
- Proposal can be delivered according to agreed TORs

PROPOSAL AND REPORT

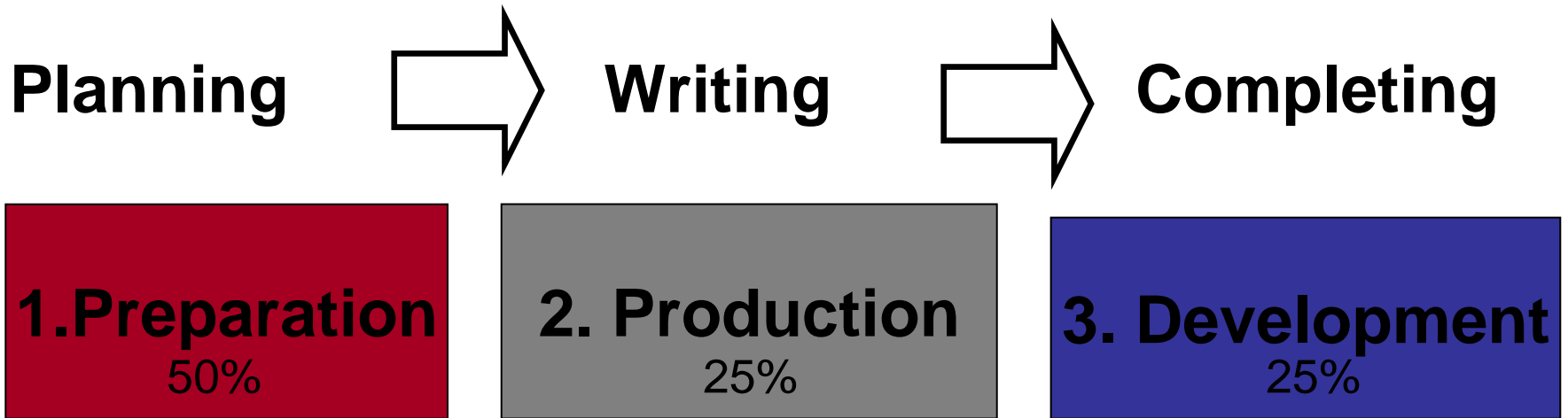
**BOTH CONTENT
SHOULD DEMONSTRATE
THE PROFESSIONALISM OF THE WRITER**

Common Business Reports



from **Business Communication Essentials – International Edition 2010**
Courtland Bovée / John Till

Stages in Writing



Report Writing Stages

I

- Company identifies area for investigation
- Personnel and/or consultant are identified to research the area and produce a report
- Determination of the purpose of the report

II

- Decide on methods or procedures for gathering data.
- Conduct research and gather information.
- Organize and analyze the information collected.

III

- Write draft report
- Edit and proofread the draft to improve it.
- Submit improved report.

Celebrate!

From a Management's Perspective

Order in Report	Order Written	Executive reads
1. Executive Summary		
2. Contents		
3. Introduction		
4. Findings (Main Body)		
5. Conclusions		
6. Recommendations		
7. Bibliography/sources		
8. Appendices		

Order in Report	Order Written	Executive reads
1. Executive Summary	6	Always
2. Contents	7	N/A
3. Introduction	1 (unless academic Report)	Sometimes
4. Findings (Main Body)	3	If interested in research
5. Conclusions	4	If surprised
6. Recommendations	5	Nearly always
7. Bibliography/sources	2 Write as you research	If report shows area that needs further investigation
8. Appendices	Any time you find extra info	Rarely

Planning Your Report



- **Clarifying Terms Of Reference**
- **TORs are a guiding statement used to define the scope of your investigation (Report)**
- **TORs can help you to identify your audience**

Always Assume Your Assumptions Are Wrong

**Appendix 1.1 Specific Terms Of Reference
CASE TABEISA**

Consider All Factors (CAF)

Step 1

- **Get together with your customers and brainstorm all the different factors that are *or* could be important to the success of the project.**

Step 2

- **Assumption-check the items on your list
For each item, try to identify (false) assumptions you are each making about it.**

de Bono's Thinking Course, Edward de Bono, Facts on File Publications, 1985, ISBN 0-8160-1895-2

Terms of Reference (TORs)

Why?

- The background, context and reasons behind the purpose of the report

What and How?

- The objectives (global) and required outputs of the consultancy (methodology)
- Expected tasks to reach the objectives

Who and What?

- Expert profile required
- Working language

TORs continued

When and Where?

- Time schedule for number of days for the assignment per expert
- Expected fieldwork, travel, desk and deliverables (presentations/final report)
- Planning & Location: any expected travel and field work

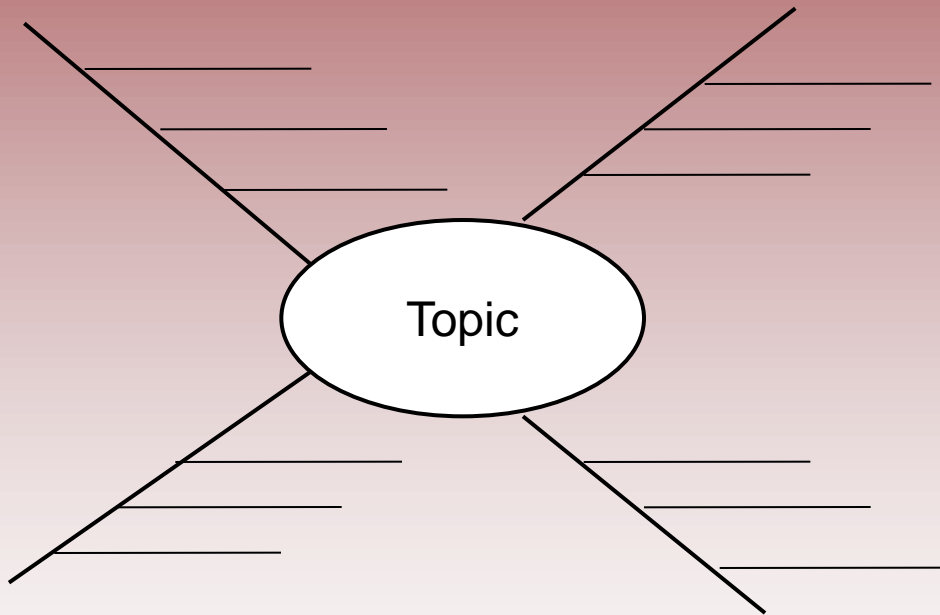
Which?

- Resources (support, personnel, offices, technology, vehicle) made available to the consultant/experts
- Data, documentation, information (history)
- Reporting requirements (report submission, format and quantity)

Planning Your Report

- **Consider the Report as a whole**
- **Focus initially on the ideas**
- **Draw up an outline structure**
- **Collect and select your information (list)**
- **Organize the information (spider diagram)**
- **Prepare an optimal (skeletal) framework to maintain a sense of perspective**
- **Set up an Action Plan and sensible time scale for completion by the given deadline**

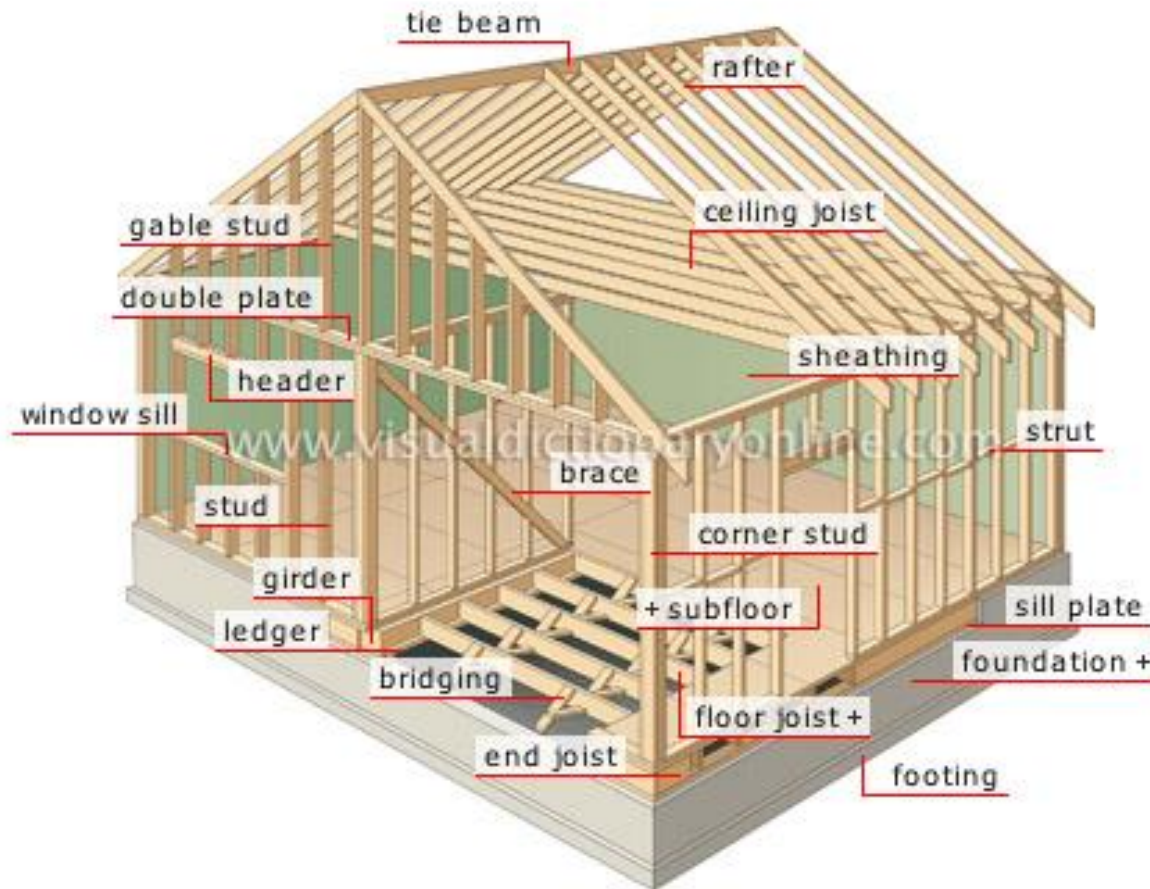
Organizing the information



- Write the main theme in the centre of the piece of paper
- Write down all the ideas and key words related to your topic starting from the centre and branching out along the lines of the connecting ideas.



BUILDING A SKELETAL FRAMEWORK



The quality and durability of any 'house' construction depends largely on the framing process.

Three stages of production

Step 1: Working **title**

Step 2: Consider the **overall structure**
Introduction, Main Body, Close

Step 3: **Reshape** the material into a structure that your readers will find acceptable, logical and intelligible

“The skill of writing is to create a context
in which other people can think.”

Edwin Schlossberg,
Principal of ESI Design

- **Authorization** Why was the report written? Who requested it, and when?
- **Problem/purpose**
- **Scope**
- **Background**
- **TORs**
- **Sources and methods**
- **Definitions**
- **Limitations**
- **Report organization**

Introduction (Scope)

- **Which resources were available to you?**
For example staff, time and equipment)
- **What limitations, if any, did you work under? What were the reasons for these?**
For example, “The report does not analyse departmental expenditure in June because the figure were not available.”
- **Which sources of information did you use? How did you obtain this information?**
- **What were your methods of working?**
For example, a technical report will require a technical explanation of methods used.
- **How is the report structured? Why did you use this method of presentation?**
This explanation helps the reader find their way around the report and shows the logic of the layout.

MAIN BODY

RESULTS OF FINDINGS

- **Explanations**
- **Discussion**
- **Facts, statistical evidence and trends**
- **Analysis of action**
- **Pros and cons**
- **Procedures**
- **Methods and approaches**
- **Criteria**
- **Conclusions, recommendations**
- **Support**

CONCLUSIONS RECOMMENDATIONS

For direct approach

- Briefly restate your conclusions or recommendations in the same order as the body

For indirect approach

- Use the close to present your conclusions or recommendations for the first time
- Do not present any new facts!

For motivating action

- Spell out exactly what should happen next
- Provide a schedule with specific task assignments

Rule to remember

A conclusion reiterates the importance of the main idea and summarizes the evidence presented in support of it.

Recommendations



- Probably the most important part of a report
- You make suggestions about how to solve problems, or how to take advantage of opportunities
- Your reputation as a professional can be influenced by the quality of your recommendations

Recommendations: Style and Tone

- This section should be formal
- The strength of your recommendations will partly depend on the company's culture

For example: 'You must change...'

'The company should consider changing...'

- Correct language is important

No errors!

Scenario

A customer visits your company and talks to a salesperson. The salesperson is new, and lacks product knowledge, so sells the customer an unsuitable product. Later the customer discovers that the product is unsuitable, and therefore he returns the product, complains, and asks for his money back.

SMART Recommendations

- Specific
- Measurable
- Achievable
- Result-oriented
- Time-bound

ACTION

Write a recommendation for the scenario

include

- **Cost/benefit analysis**
 - **Opportunity cost**
 - **Problem Analysis**

Time management: 45 minutes max

EXECUTIVE SUMMARY (Abstract or Synopsis)

- Intention (Your purpose and scope)
- Outline (what was done and how)
- Main findings
- Main conclusions
- Main recommendations (if necessary)

Provide additional detail and reference material

- **Bibliography/Sources**
- **Appendices**
- **including TORs**

Be consistent!

Apply a progressive numbering system.
The decimal notation system is commonly used.

Example

Title: The Consultancy Process: Report Writing

1. *Introduction Proposal vs Report*
 - 1.1 Quality and Value
 - 1.2 Content
 - 1.21 Management/Level Reader

2. *Common Business Reports*
 - 2.1 Informational and Analytical Reports
 - 2.2 Stages in Report Writing
 - 2.21 Terms of Reference

3. *Report Writing Techniques*
 - 3.1 Organizing the information
 - 3.2 Collecting the information
 - 3.3 Building a Skeletal Framework

Presentation

- Leave wide margins for binding and feedback comments from your reader
- Headings should be clear - highlighted in bold or underlined
- All diagrams and illustrations should be labeled and numbered
- Technical terminology should be listed in a glossary of terms at the back of your report
- Font style: cultural preferences may exist (bold, italics)
- Graphics: cultural sensitivity impacts spacing, use of color and overall layout

Informal

- You know your readers (you, I, we)
- Overly informal can be perceived as trivializing important issues!

Formal

- Eliminate all personal pronouns including I, you, we, us, and our
- Use impersonal journalism style
- Emphasize objectivity
- Avoid personal opinions
- Build argument on provable facts
- Overly formal style can put too much distance between writer and reader

Use of Language

- **Active or passive?**
'I recommend...'
'It is recommended that...'
Avoid mixing the two voices
- **Think simplified English!**
- **Remove ambiguity**
Consider one meaning, function, context, grammar, punctuation
- **Idioms check** (in the same boat, above someone's head, once in a blue moon)
- **Subjective language**
(What does the term 'beautiful' mean to you?)

Visual Literacy

“Make everything as simple as possible, but not simpler.”

Albert Einstein

Most people are visual in nature:
pictures and graphs go a lot further
in understanding

Conclusions

1. Your writing **creates a context** in which other people can think
2. Your writing is **Proven Performance** of understanding your clients' needs.
3. Your writing <in many cases> is **everything the customer is left with after you leave.**

References

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Planning for Language & Cultural Differences**
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- **Hong Kong Polytechnic University
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- **Essential English Idioms**
Spears, Kirkpatrick 1999 NTC Publishing Group



**THANK YOU
FOR
YOUR PARTICIPATION**