

HOW TO BE A CONSULTANT

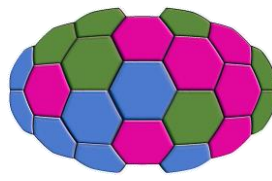
a programme for new and aspiring consultants

Report Writing

**by Simon Wallace LLB CITP,
MBCS, CMC
30th June 2021**



We're talking about all written deliverables (not just "reports")



Marketing materials

Sales Pitches

Proposals

Contracts

Business Cases

Requirements

Specifications

Documentation

Progress Reports

Designs

Training Materials

User Manuals

Specialist Reports, eg IT strategy, cyber security, moving to cloud, remote working, firewall config, BYOD risk assessment etc

Change Management Materials

Job Specs

PIR

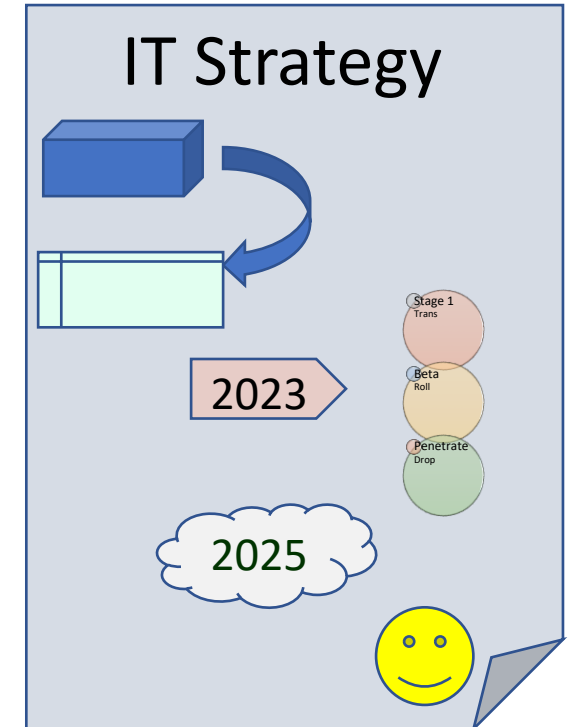
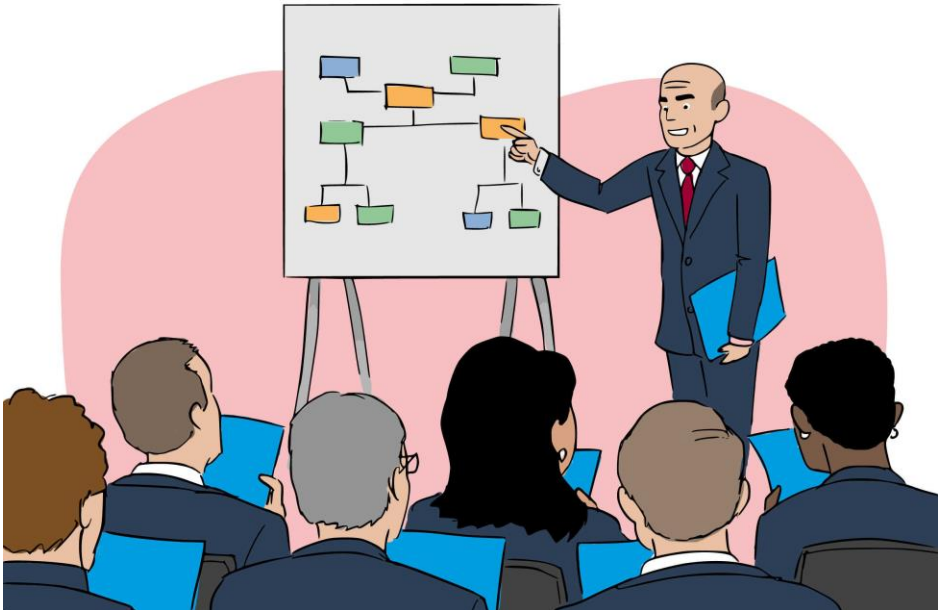
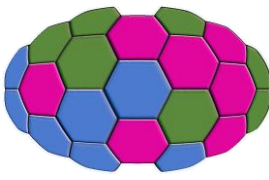
Case Study

What other types have you had to write?

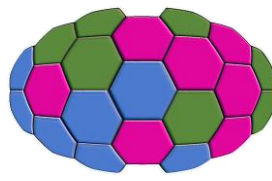


Chat

Step 1 – What Is It?



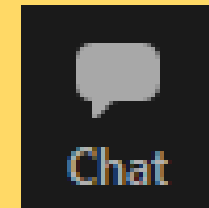
Step 1 – What Is It?

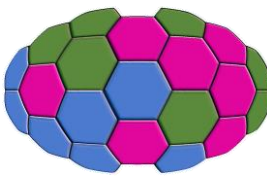


Agree!!!

- What's the purpose and scope?
- Who needs to know – who are the readers?
- What detailed information do we need to investigate?
- Who or what are the sources of information?
- What will the deliverable's contents be?
- What will it look like - eg format(s), style, depth of detail?
- What it's going to look like – media, quality, toc, depth etc?
- In whose name will it be published?
- Who needs to be involved in reviews and sign offs?
- How will it be published and promoted?

What do you
say if the client
tells you what
your conclusion
should be?





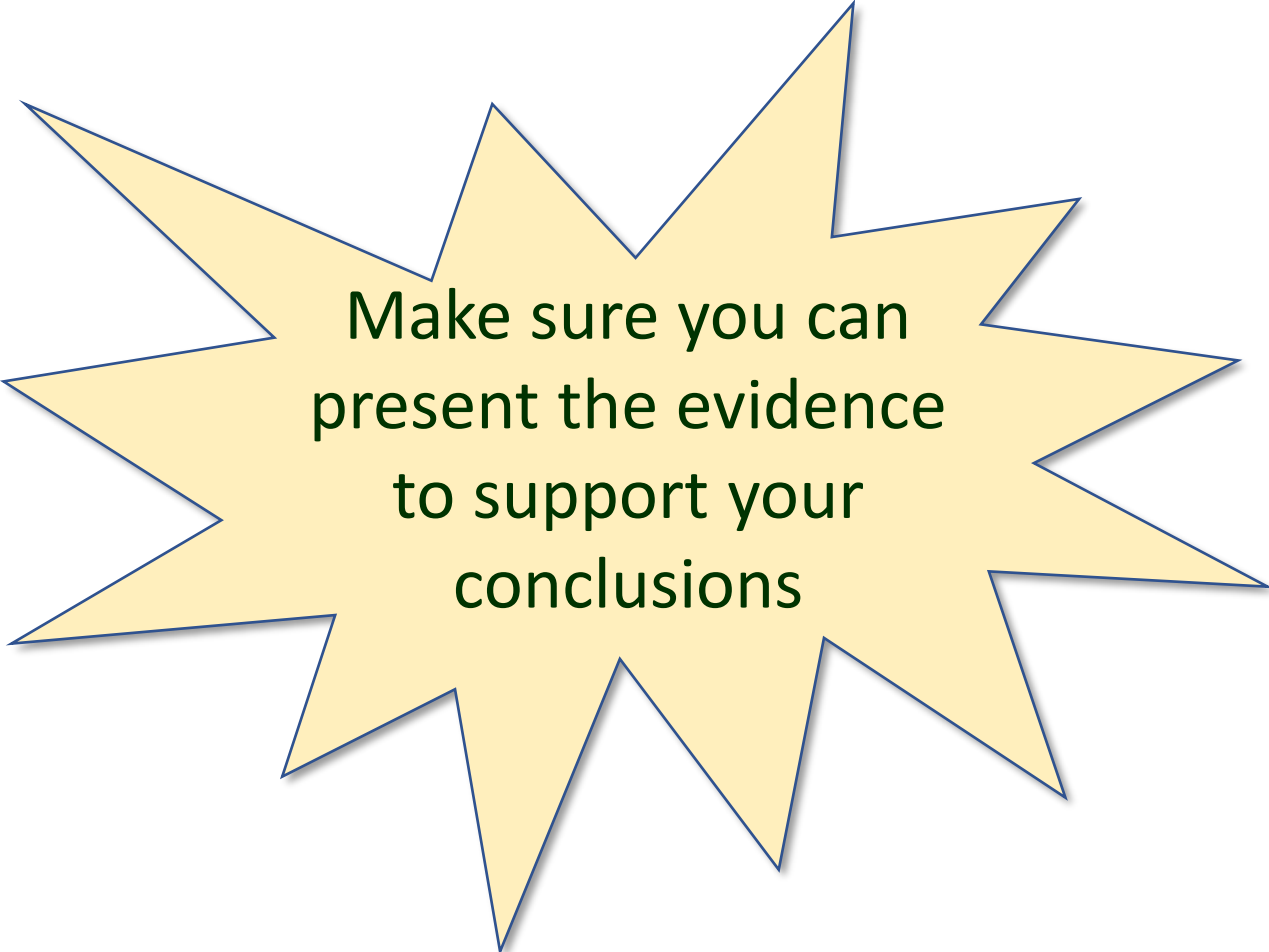
Get your facts right!

What sources?

- Interviews
- Documentation
- Statistics
- Benchmarks
- Tests
- Sandboxes
- Prototypes
- User Feedback
- Suppliers' documentation

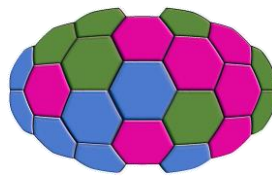
What analysis?

What hard evidence do you have?



Make sure you can
present the evidence
to support your
conclusions

Investigations & Inquiries when things are going or gone wrong



Challenge

- Hostile environment
- Defensive behaviours
- Dishonest interviewees
- Conflicting truths
- Blame game

Response

- All evidence and interview notes cross referenced to issues and instantly accessible
- Report the conflicting evidence to illustrate the problems
- Any conclusions based on hard evidence
- Be tough, this is not the time for friendly, polite customer relationship building

Late, overbudget (non-UK) Air Traffic Control system

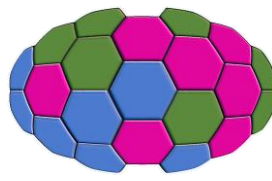
- Developer – the problem is we are swamped with changes
- Customer – there has only been one change

International telecoms business

- We find the currency conversion in a new system is the wrong way round!
- Finance Director says “can’t be – we’d be bankrupt”

Non-UK bank

- New banking system makes errors – all customers’ balances are wrong

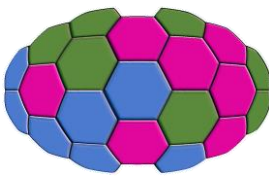


Formality and precision

- Write in a style that suits the audience for your document
- Use clear, unambiguous, generally-understood language
- Use standard English grammar, punctuation and vocabulary
- Always explain abbreviations and jargon
- Provide references to sources and other evidence
- Sound like you know what you are talking about

If you want to look
professional it
really does matter

Clear, understood and unambiguous



Vodafone drops WiFi coverage

Microsoft drops 64-bit OneDrive

Microsoft drops IE 11

**Google drops
Android 11 beta 2**

- We gave the development team their marching orders
- The Board tabled the proposal
- We found the error - it was due to the Project Director's oversight
- All data is pseudonymised
- Risk: service provider bankrupt

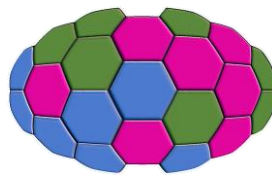
- Great Britain (GB)
- MSP (Microsoft Project, Managing Successful Programmes, Member of the Scottish Parliament, Managed Services Provider)

**What bad wordings
have you encountered?**

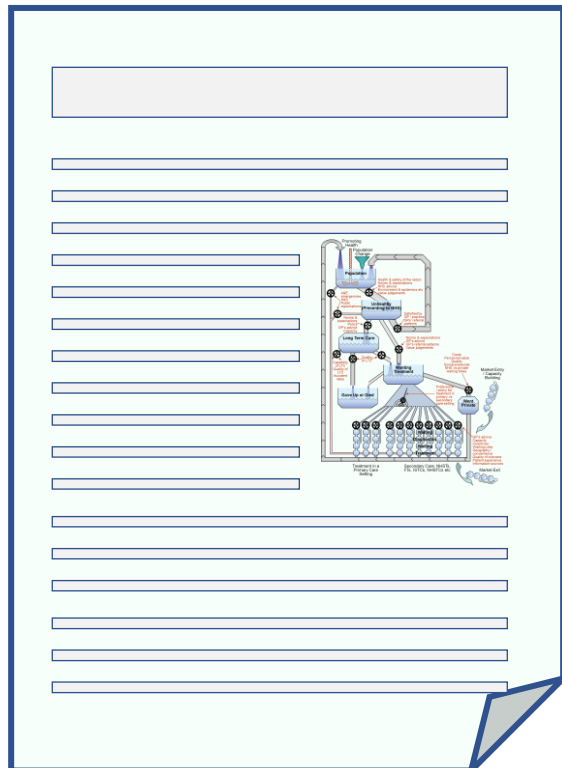


Chat

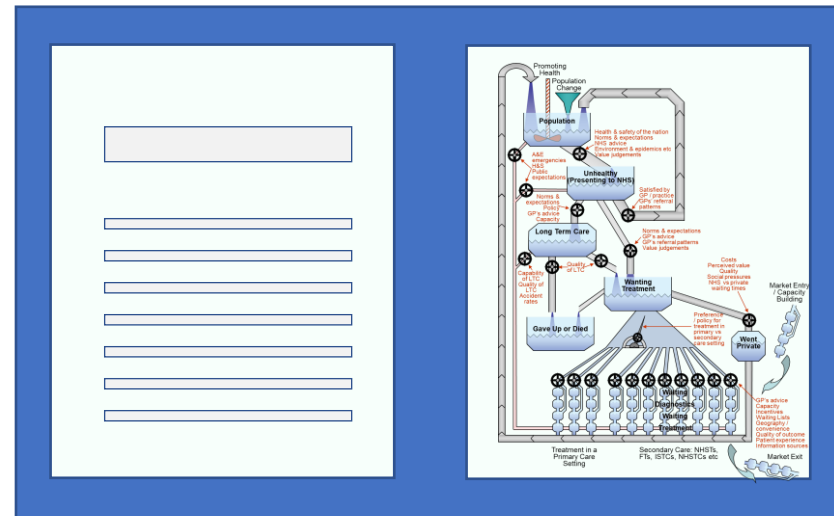
Format of Report



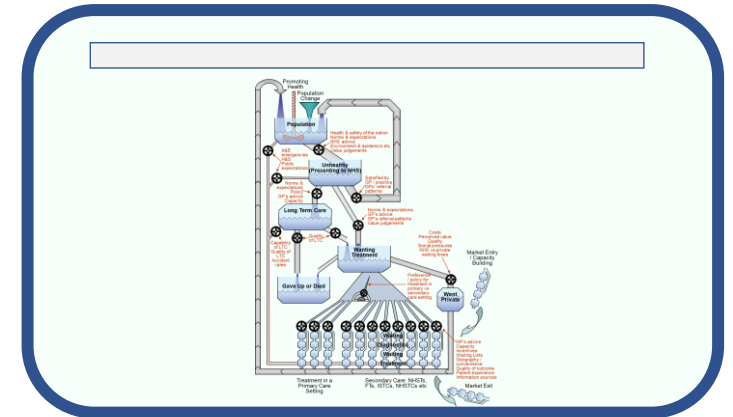
Word



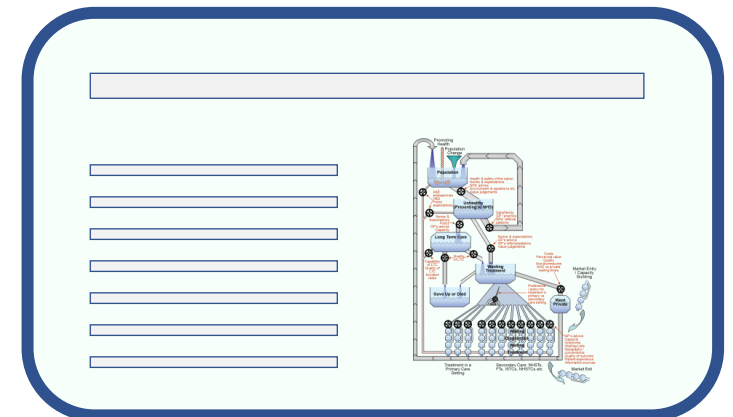
Printed PowerPoint



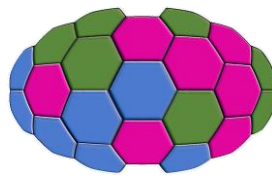
Presentation Slides



Web



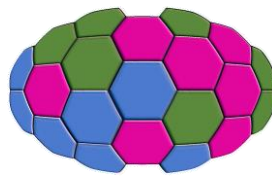
Example Large Report Layout



- Cover Page – Title
- Status & Version Control
- Management Summary
- Introduction – Purpose, Scope
- Background
- Method / Approach
- Facts & Evidence
- Requirements
- Options (with pros and cons)
- Recommendations (with justifications / business case)
- Details of Solution / Next Steps
- Appendices (eg key evidence, analysis, assumptions, risk assessments etc)

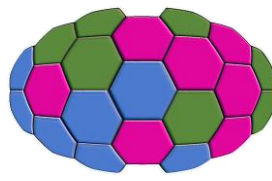
You need to be able to cross refer your findings to the evidence you gathered, but does it all need to be in the report?

What the Senior Clients Read

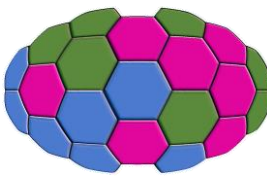


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What the Client Sponsor Reads



- Cover Page – Title
- Status & Version Control
- Management Summary
- Introduction – Purpose, Scope
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- Method / Approach
- Facts & Evidence
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Quality of Content

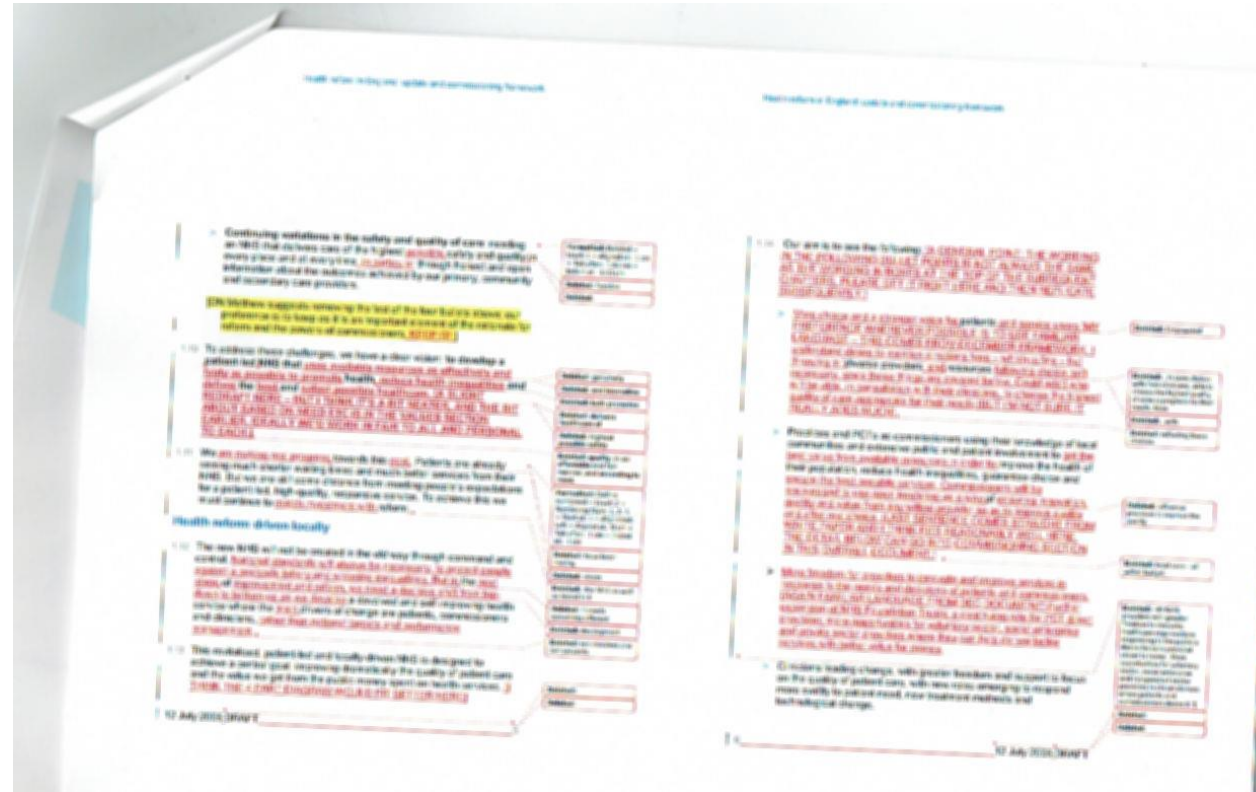
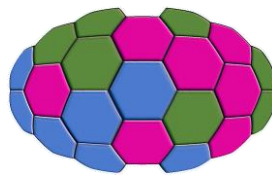
Content Review

- Does it meet the brief?
- Is the content relevant, complete, and well-written?
- Do the facts, evidence and analysis support the conclusions?
- Is our position as advisors correct and safe?

Checking and proof reading

- Spelling
- Style and layout
- Legible diagrams
- Table of Contents
- Cross references
- External references

Client Review and Sign-Off



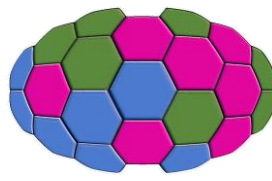
What if the client disagrees with you?



How do you get the client to sign off the report?



Good consistent styling (using your own or the client's style)



276311 update and commissioning framework.pdf - Adobe Acrobat Reader DC (64-bit)

File Edit View Sign Window Help

Home Tools 276311 update and... x

Save Star Cloud Print Comment

Up Down 29 / 46

Hand Rotate Left Rotate Right 100%

Page Thumbnails

Bookmarks

- Foreword by Patricia Hewitt
- ▼ The reform programme
 - Introduction
 - Why reform?
 - Health reform driven locally
 - Benefits
 - The right reforms for the right services
 - ▼ Choice and commissioning
 - Choice
 - Draft principles for choice
 - Commissioning
 - The next steps
 - ▼ **Provider reform**
 - Providing the best services for the best possible value
 - Strengthening NHS providers to innovate and improve

4. Provider reform

Providing the best services for the best possible value

More freedom for providers to innovate and improve services in response to the needs and decisions of patients, GPs and commissioners. Further expansion of NHS Foundation Trusts; a continuing role for PCT direct provision; more opportunities for voluntary sector, social enterprise and private sector providers where they can help deliver better services with better value for money.

4.1 The stronger role for commissioning described in the previous section will present both a challenge and an opportunity for the provider side of the healthcare system. Reform of the provider side is designed to support healthcare organisations to change, so that:

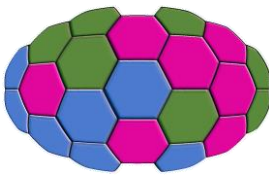
- > NHS hospitals, NHS Foundation Trusts (NHS FTs), community providers and the wide range of other providers are able to continue to innovate and improve, as expectations rise and patient choices start to drive change; and
- > new ways of delivering care can be more rapidly developed and introduced on the ground.

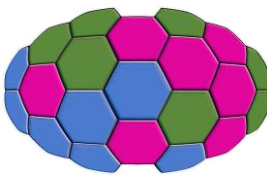
Strengthening NHS providers to innovate and improve

4.2 NHS FTs have been very successful:

- > They are good for patients.

Quality of Presentation





Get it Noticed

The job's not done until the right people have got the message!

- Sponsor's communication
- Circulation List
- Presentations
- Board meeting
- Online version
- Video

