British Computer Society
The Chartered Institute for IT

HOW TO BE A CONSULTANT
a programme for new and aspiring consultants

bcs The Chartered Institute for IT

Report Writing

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30th June 2021

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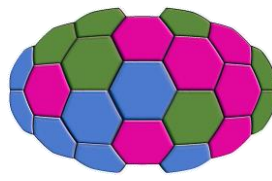
Marketing materials

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

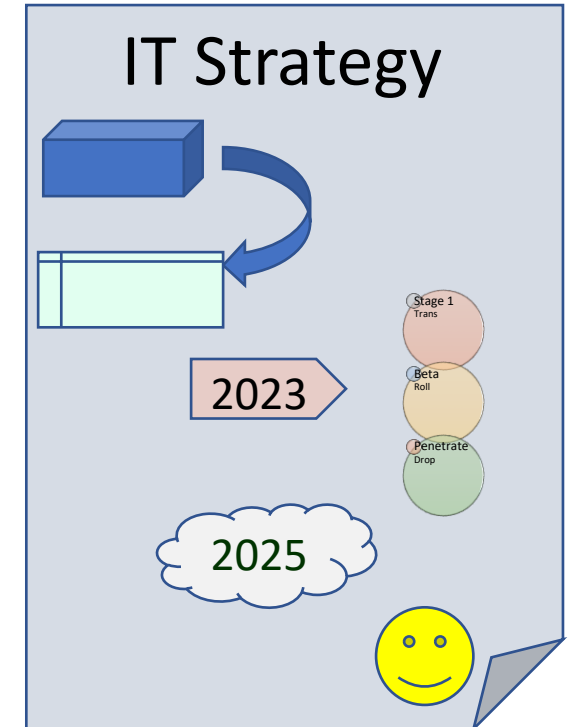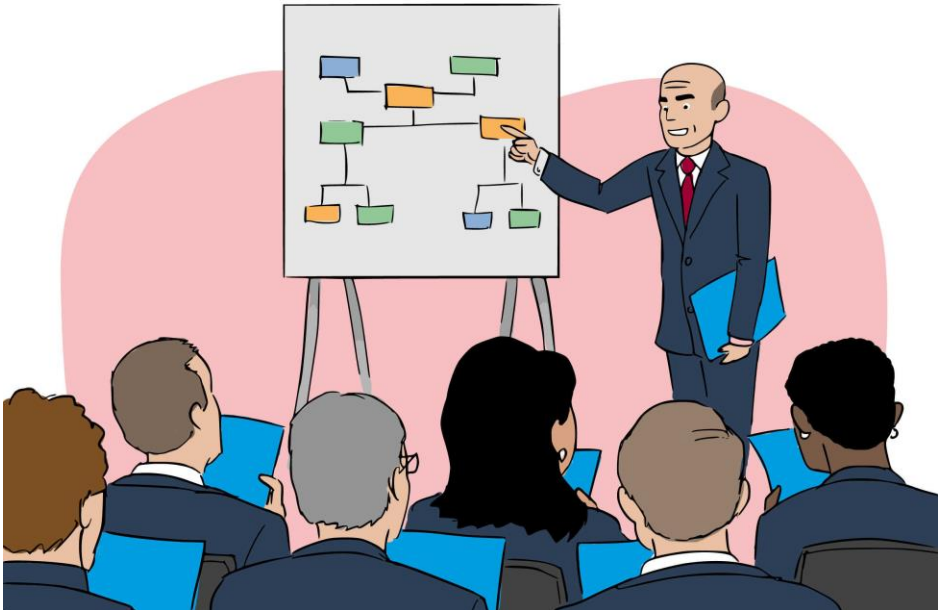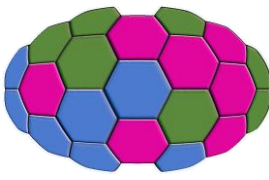Change Management Materials

Job Specs
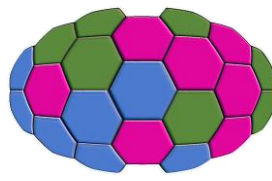
PIR

Case Study

What other types have you had to write?

Chat

Step 1 – What Is It?
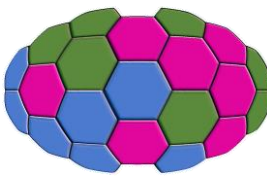
Step 1 – What Is It?

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?
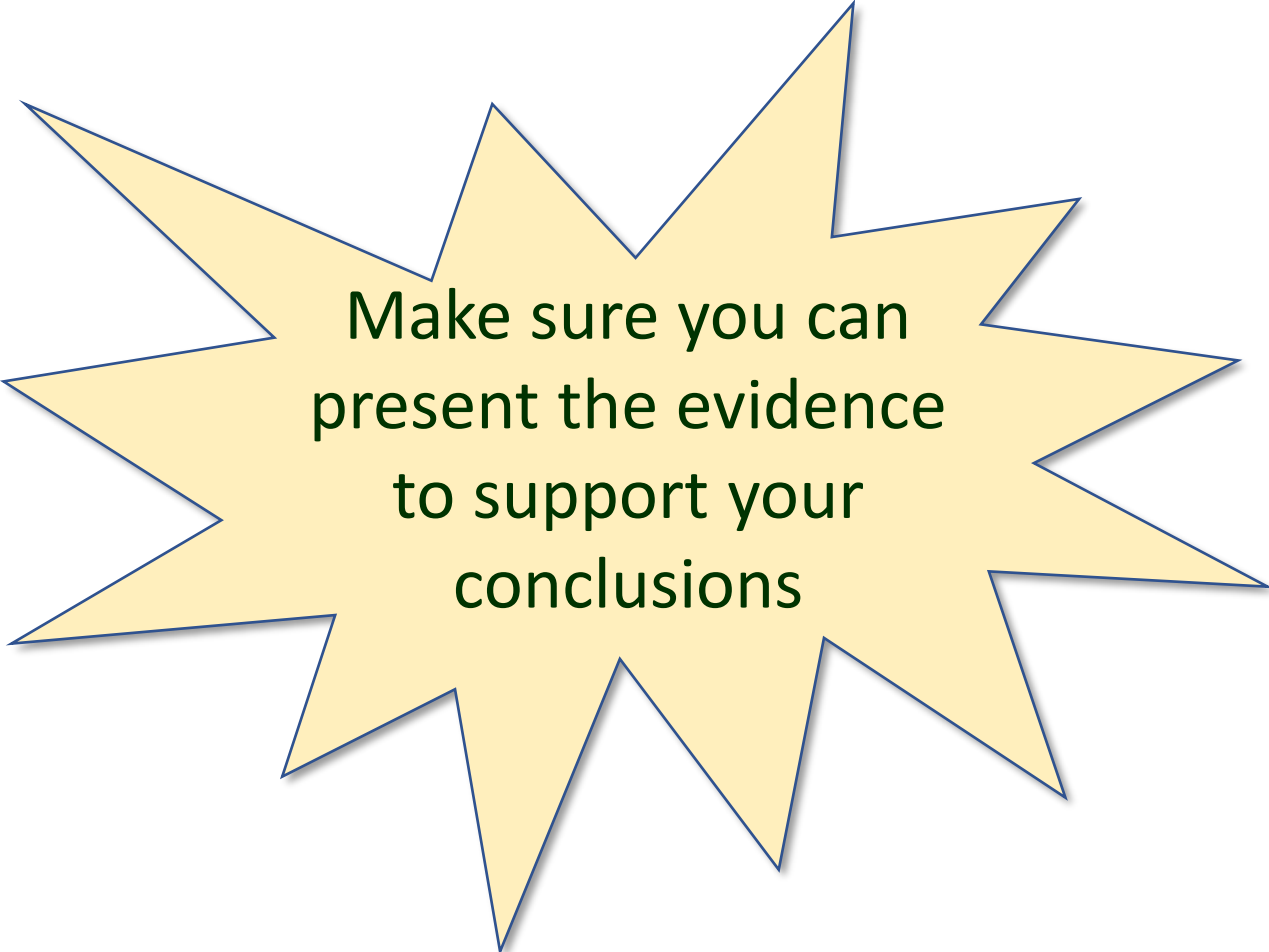
Chat
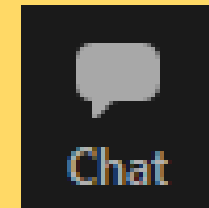
Get your facts right!

What sources?

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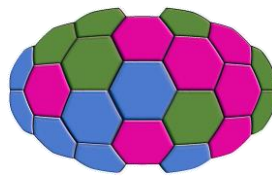- Prototypes
- User Feedback
- Suppliers' documentation

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
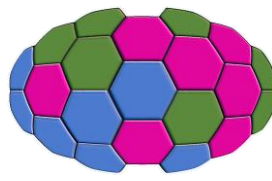
Formality and precision

- 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
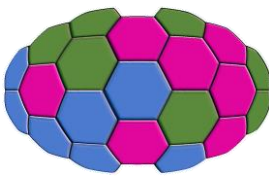
Vodafone drops WiFi coverage

Microsoft drops IE 11

- 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

Microsoft drops 64-bit OneDrive

Google drops Android 11 beta 2

- 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
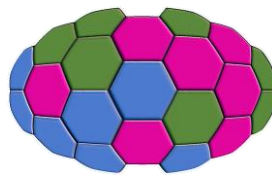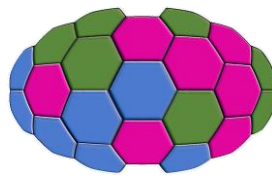
Word
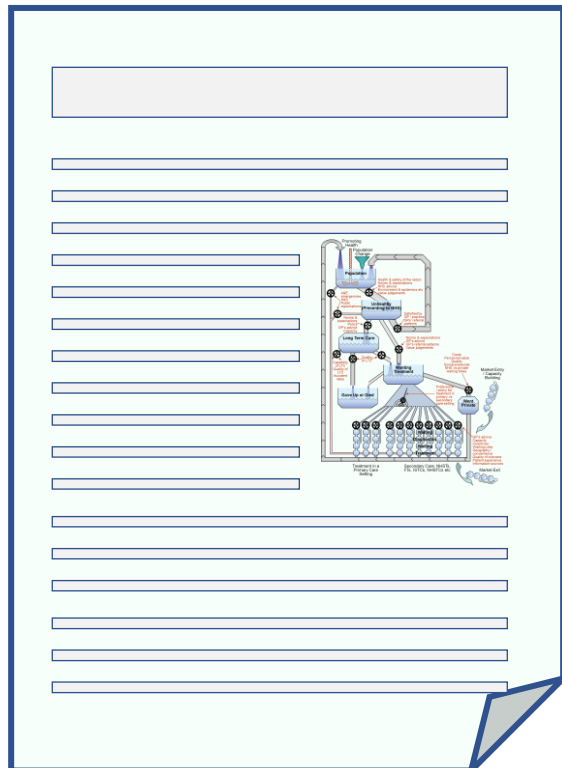
Printed PowerPoint
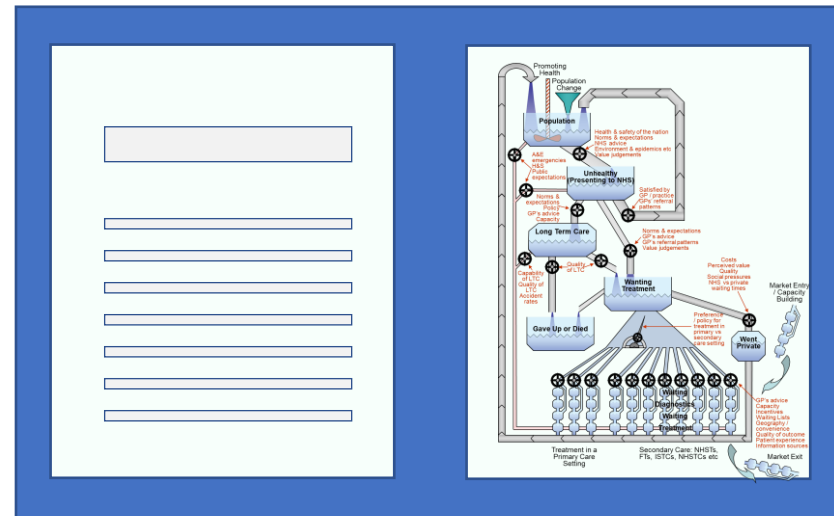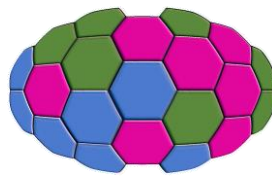

Presentation Slides
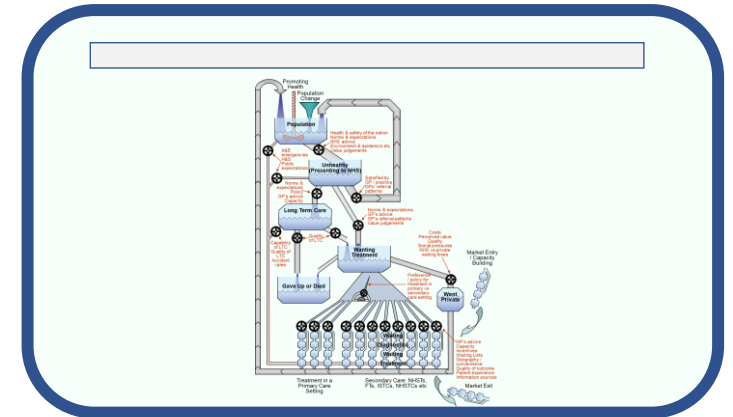
Web
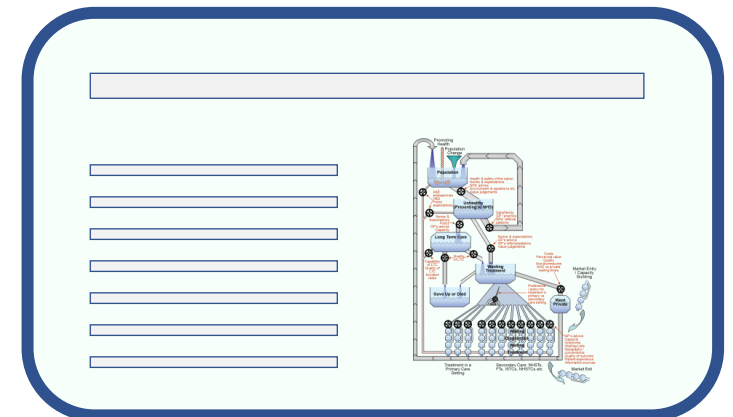
Example Large Report Layout

- 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
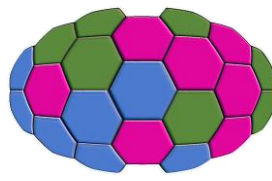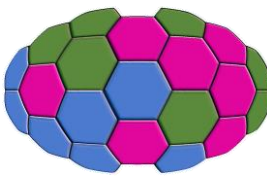
- Appendices (eg key evidence, analysis, assumptions, risk assessments etc)

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

- 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)

What the Client Sponsor Reads

- 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)

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
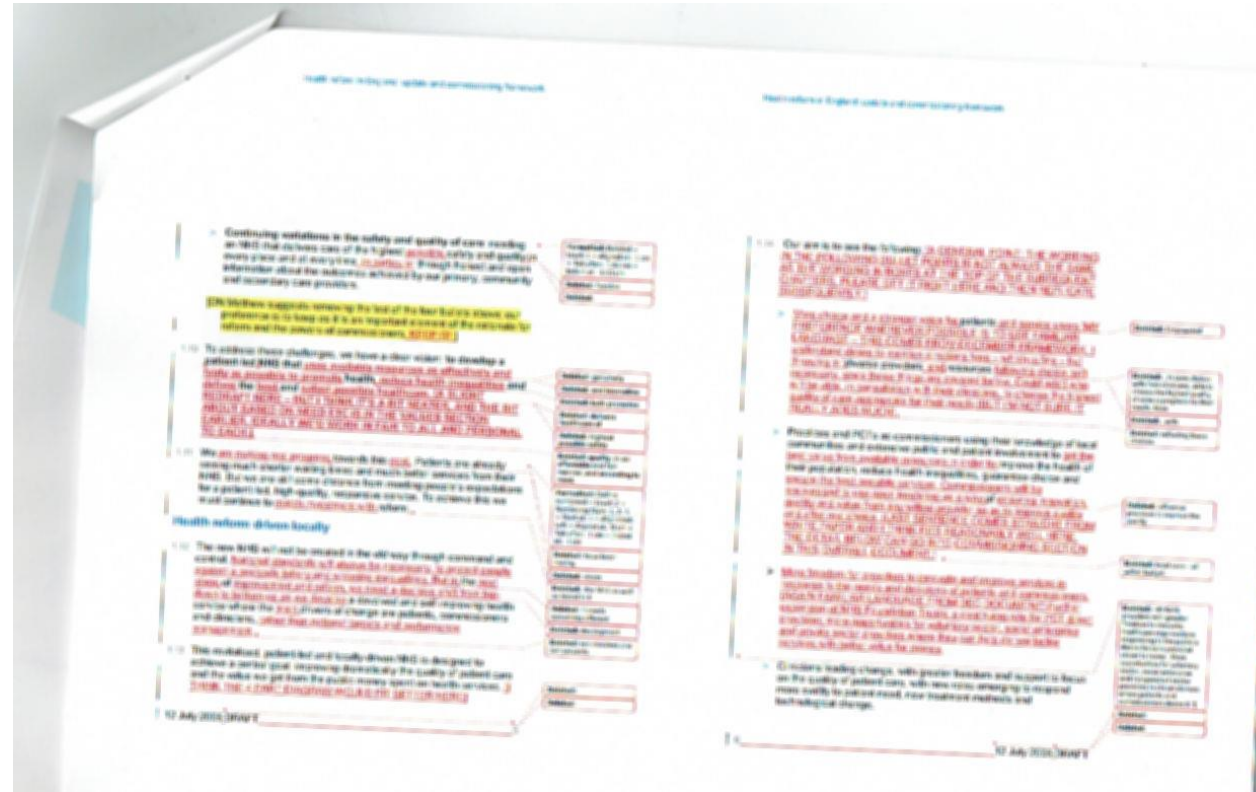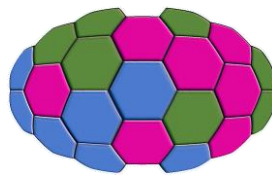
What if the client disagrees with you? [Chat]

How do you get the client to sign off the report? [Chat]

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

Quality of Presentation
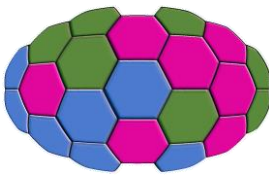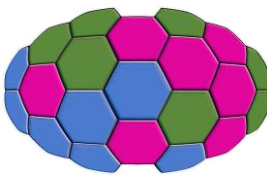
Get it Noticed

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

- Sponsor's communication

- Circulation List

- Presentations

- Board meeting

- Online version

- Video