General Outline for Business Consulting Reports

Management 451
Your group's report will follow a similar format. Sample consulting reports from previous semesters are available in the library on course reserve.

I.   Cover Page

Covers are usually printed on heavy, flexible pieces of paper called "coverstock." The main reason that "coverstock" is used is so that it can protect the document. The cover should carry the title of the report along with some extra information that will help people who may want to file it for later use. For example, you might want to list the members of the team, show off the company logo, and list the date of the final submission of the report.

For more on creating a good title, make sure to carefully review *section 3* (Title Page)

You can create your cover by preparing your material with a word-processing program. If your computer's printer won't print on "coverstock," you can print it on regular paper, and then photocopy it on heavier paper (Paula Lewis in the EMA office can help you out with this).

II.   Disclaimer Page

A disclaimer is a statement that the company or organization hopes will limit its liability for the product or service it provides (as your instructors, we certainly do not want to be held responsible for any bad advice or research you provide your clients ☺).

The disclaimer statement is fairly typical in consulting projects, and if nothing else reflects the seriousness of writing at a professional level. There is often a great deal at stake, so make sure that your writing and research processes mirror this seriousness.

Please feel free to cut and paste the disclaimer statement:

DISCLAIMER
This material is based upon work supported by Marietta College. Any opinions, findings, conclusions, or recommendations are those of the authors and do not reflect the views of Marietta College, its employees or its administration.

III.   Title Page

The title page of a formal report works in collaboration with the cover page to provide a solid introduction to the consulting report. Your team's report will certainly have a sense of permanence; it will likely be filed and periodically reviewed and consulted. Therefore, the title page should include specific information regarding the report:

- Names of the authors or other contributors, including contact information and the name of the organization you're working within (Marietta College)

- A very good and specific title that reflects, as much as possible, the main points of the report

- The name of the business or organization that your team is consulting

IV.   Table of Contents

A table of contents serves three purposes. Obviously, it helps readers who do not want to read the whole report but want to easily locate particular parts of it. In addition, it assists readers who want an overview of the report's scope and contents before they begin reading it in its entirety.

Also, the table of contents serves as a tool for writers of the report by outlining specific aspects that need to be addressed.

Normally, you would create the table of contents by outlining section titles and headings. You would then make sure that the table of contents reflects the organization of the report and enables your readers to easily locate specific pieces of information.

Because previous writers and readers have developed certain expectations about the contents of a formal consulting report, the table of contents has already been developed for you. This "superstructure" or "boilerplate" should be helpful during the planning stages because it suggests the kinds of information that your readers probably want and the manner in which the information should be organized and presented.

V.   Executive Summary

An executive summary is designed primarily to serve the person who, at least initially, does not intend to read the entire report. It usually states the main points of each section and emphasizes results, conclusions, and recommendations, usually in around three pages.   Executive summaries are ideally suited to the needs of readers who are seeking advice about a decision or a course of action. These summaries are called executive summaries because some decision-makers rely wholly upon their advisors to read and evaluate the rest of the report.

For the purposes of this project, the executive summary should be three pages, and should concentrate on listing the tasks performed by the team. This would involve summarizing problem/opportunity areas, methodology, conclusions, and recommendations. It's not a bad idea to develop an executive summary during the early stages of your team's writing process, as this document can help to provide your team some focus. Keep in mind, however, that this will also be a document that will need to be revised to properly reflect your report.

VI.   Introduction to the Report

The introduction allows your readers to preview the nature of the project you have undertaken for your client. Essentially, the introduction forecasts the basic organization of the report. Some writers and readers insist that the following questions should always be addressed and/or considered in the introduction to the report:

- **What is the problem or the opportunity?** Be specific. Whenever you can, quantify. Describe the problem or opportunity in monetary terms, because the proposal itself will include a budget of some sort and you want to convince your readers that spending money on what you propose is smart. Be positive. In other words, don't say that a problem is slowing down production; say that it is costing $4,500 a day in lost productivity.

- **What is the purpose of the proposal?** Even through it might seem obvious to you, the purpose of the proposal is to describe a problem or opportunity and propose a course of action. Be specific in explaining what you want to do.

- **What is the background of the problem or the opportunity?** In answering this question, you probably will not be telling your readers anything they don't already know. Your goal here is to show them that you understand the problem or opportunity, as well as the relationships or events that will affect the problem and its solution.

- **What are your sources of information?** Review the relevant literature, including internal reports, memos, external public articles, or even books, so that your readers will understand the context of your work. Clients are looking to you for sound advice. If your research is sloppy, incomplete, and rather nominal (for example, you checked out a few websites that the client could do on his or her own free time), your report will be less

convincing, and your ethos as a provider of sound advice will be suspect. The best reports always contain complete and thorough research--and complete and thorough research cannot be completed in the waning moments of the semester.

- **What is the scope of your proposal?** If appropriate, indicate what you are proposing to do as well as what you are not proposing to do.

- **What is the organization of the proposal?** Indicate the organizational pattern you will use in the proposal.

- **What are the key terms that will be used in the proposal?** If you will use any new, specialized, or unusual terms, the introduction is an appropriate place to define them.

In addition, you will want to include the following information in your introduction:

- The report is written both to provide the client with a record of the project and to fulfill one of the requirements for Management 451.

- List the members of the consulting team, and acknowledge anyone who has provided the team with assistance, including your project advisor and the faculty who have taught Management 451.

VII.   Background

Because not all clients will necessarily be competent in your field, the background section needs to clearly articulate the context behind your research.

The Background Sections require you to conduct comprehensive research. Your suggestions need to be based on the research that your team has conducted, and this research needs to be demonstrated to your client.

Again, your ethos as a sound provider of business advice is largely based on the research that supports your findings and ideas.

Background Sections
Normally all of the categories of background information listed in the report outline can be fully developed. The order of these sections can be varied if such an alteration makes sense.

Open the "background" sequence with a major heading, **BACKGROUND**, followed by a brief introduction that explains how the background sections help to key frames of reference for your analysis. Open each section with an appropriate heading. The generic headings can be revised so that they are more specific. For example, *Client Profile* can be revised to read *A Look at Our Client: Historic Harmar Merchants*.

Clearly organize each of the sections. Open each section with an introductory preview of the material. Even more importantly, end each section with a conclusion that summarizes and explains to the client what the information is designed to demonstrate.

Relate and unify all of the sections so that it reads as a coherent whole. Use good transitions between sections, and conclude with a section in which you pull together and evaluate the background.

Refer to resources in the actual text itself. For example: "In their *Fourteen Largest Businesses in Worthington*, the Worthington area Chamber of Commerce…" This allows the reader to see the resources, and the research, without taking his or her attention away from the paper.

The Background section is an important phase in researching and coming to understand your client, the firm, and the situation and environment in which they operate. It is an important part in the structure of your final paper, and should be between 8 and 10 pages.

Please remember that the Background section is not the place to analyze problems and opportunities. These sections provide the background and frame of reference for the analysis of the problems.

VII. a   Client Profile
The purpose of the Client Profile is to both "bring the client to life" and to tie the information together by explaining how it helps portray your client as a member of the business community. Do not hesitate to interpret information and to draw conclusions. If your client is a group of people of whom your contact person is a member, you may want to treat the group as a "collective client." Do a profile of the group as a whole (for example, the history and makeup of a governing board.)

Some things that you will want to include in the Client Profile:
- Places of residence
- Educational and training background
- Career experience
- Civic interests and activities
- How and why your client became interested in this business
- Your client's business philosophy and/or attitude towards business
- Any other information that contributes to a portrait of your client as a person who has chosen to become the operator of a small business

VII. b   Nature and History of the Firm
The nature of the firm is a brief description of what it does in the way of production or service.

The history of the firm traces the process and patterns of the firm's development. This might include a listing of:

- The firm's previous owners
- The firm's location(s)
- The firm's facilities, and how they have changed
- The firm's diversification over the years
- The firm's financial history
- The firm's staffing, and how it has changed

In the case of a firm with a short history (which has likely undergone little change), merge this section with the section titled *The Firm Today*. It would then make sense to use the heading *History of the Firm* for the two merged sections.

VII. c   The Firm Today
The meaning of the word "today" is variable, and differs from firm to firm (last calendar year, last fiscal year, last quarter, span of time since they moved to current location, etc.)

This section will include a description of:

- Current facilities (external and internal design and appearance)
- Its immediate locale and setting
- Organizational structure and personnel
- Current financial status

Remember, this is not the place to analyze the problems or the opportunities. It is important that the information placed under each heading only speaks to that particular heading.

VII. d   The Business and Market Environment

This section describes the business and market climate of the local community and / or region. The focus here should be on the business and economic conditions that affect the firm's operation. For instance, a craft shop or a bed-and-breakfast would tie into the larger picture of the area's tourism; a concrete supplier would be affected by trends in new houses and commercial building starts.

There should also be consideration of the state, national, and global prospects and trends that could affect the local and regional business climate and / or your client's business prospects. Your client's firm is, in varying degrees, part of these micro and macro environments. Seeing the firm in these contexts can be crucial in perceiving and understanding its problem and prospects.

This is yet another section where thoughtful, careful, and thorough research is important. Your client will be extremely impressed with a demonstrated understanding of the local, regional, and global market conditions that impact his or her business. Overgeneral statements ("the economy is in a recession at the moment") provide nothing new to the client, and cast a shadow of doubt about the amount of insight and advice your team can provide.

Again, this is not the place to analyze or discuss any of the firm's problems or prospects.

VII. e   The Competition

This section will profile local, regional, and perhaps even global competitors. It will also discuss likely trends in competition.

This section is an important extension of The Business and Market Environment. Research and investigation beyond the client interviews are crucial in preparing this section. Again, the amount of careful and thorough research that your team puts into this section directly relates to your client's perceptions of your team's abilities. Your team needs to be prepared to provide additional information beyond the names of a few local and regional competitors.

VII. f   Defining the Firm's Objectives

This section should include:

- A description of the firm's short-term and long-term objectives
- Prioritization of primary and secondary objectives

Objectives should be stated as specifically as possible (for example, "…to increase net income by 20% of the end of FY 2005").

VIII.   Defining the Team's Tasks

First, this section should clearly describe the tasks that the consulting team has agreed to carry out and explain how the team and client chose those tasks. Normally, these tasks can be identified concisely (for example, "Task One: Developing a Market Plan. Task Two: Selecting a New Location"). This section should also identify any tasks that the team originally agreed to perform but which, for whatever reason, was unable to complete.

The team must clearly point out how a general task breaks down into component tasks. For example, "Developing a Market Plan" will involve several component tasks. The tasks may include: "Designing and Administering a Market Survey"; "Designing an Advertising Strategy", etc. By the same token, if a team is presented with only one general task, such as "Crafting a Business Plan", they will need to break that general assignment into component tasks. The goal is to break down each task into its smallest components.

Secondly, this section is pivotal because it serves as a preview for the following section, in which you explain how you actually carried out each of the tasks.

Write about your team's tasks in the past tense, as if the project and the tasks are already completed.

IX.   Carrying out the Team's Tasks: Problem, Methodology, Conclusions, and Recommendations

This is a rather lengthy section that is organized around the team's basic tasks. A "Table of Contents" might list as follows:

Task One: Developing a Marketing Plan
Task Two: Selecting a New Location
Task Three: Securing an SBA Loan

Each task section should be organized to:

- Describe the current situation (in effect, the "problem and /or opportunity") and the needs / opportunities it creates
- Narrate and explain the procedure the team followed in addressing the needs created by the market situation
- Draw conclusions and make recommendations

The following example illustrates such an organization, using "Task Two" from the sample above:

Task Two: Selecting a New Location

- **Evaluating the Current Location**
  This is a headed section that describes any advantages but more significantly the disadvantages of the current business location. This section explains the problem and the needs it creates.

- **Identifying and Evaluating Alternative Locations**
  This is a headed section that describes alternative locations and compares them to the current location and to each other. This section narrates and explains the team's method of operation that addresses the needs created by the problem; it shows the team in action.

- **Conclusion and Recommendations**
  This is a headed section that pulls the evaluations together, states the solution, and justifies one or more recommendations.

If a task area involves two or more related tasks, the organization would reflect how the basic task breaks down into component tasks.

Task One: Developing a Marketing Plan

- **Designing and Administering a Marketing Plan**
  Current Situation
  Procedure
  Conclusions and Recommendations

- **Designing an Advertising Strategy**
  Current Situation

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Procedure
Conclusions and Recommendations

Important Note: The organization of this section should be marked by clear headings and sub-headings.

Also, this is a good time to reflect back on the research that your team conducted. Your team's ideas should not appear as if they developed out of "thin air." Use sentences that point your reader back to the research that your team conducted.

X.   Summary Conclusion

This final section pulls the report together, offers some words of assurance to the client, and states the team's (we hope) pleasure in having undertaken this consulting project. In pulling the report together, carefully summarize your findings and what you see as the prospects for your client's business.

XI.   Bibliography

"Bibliography" or "Works Cited" – call this section what you want. Whatever the case, you must list all resources that you used for this report. Therefore, it is imperative that you keep track of all the sources that your team used in the report.

Furthermore, in the text of the report you must cite your sources whenever you use ideas or data generated by someone else. You must cite these sources, even if you do not quote from them directly. When you do borrow exact wording, including key phrases, you must use quotation marks.

For examples of proper documentation and bibliographic form, see the handout from Aldred, Brusaw, and Oliu *The Business Writer's Handbook*, 6th edition. You can also access MLA and APA citation style guides from the Campus Writing Center's webpage (http://mcnet.marietta.edu/~mcwrite).

XII.   Appendices

As Brusaw's *Handbook* states: "An appendix contains material at the end of a formal report… that supplements or clarifies" (54). Depending on the nature of a consulting team's tasks, appendices will be more or less useful to the client. Among the kinds of material which might be included in appendices would be complete statistical readouts, copies of surveys and questionnaires, reprints of helpful articles, or excerpts from book length resources, brochures, copies of letters, etc.

The appendix should reflect the amount of research that the team put into the project. Be careful that you don't overdo it, though. If your appendix is too voluminous, you risk the chance that your client will simply refuse to wade through it to seek out important information.

Make sure that Appendix Materials are also referenced in the text of the report.

XIII.   Visuals

Used properly, visuals can effectively reinforce the main points of the written text. Furthermore, effectively positioned visuals provide a strong image for your readers to remember.

When using a visual, remember to direct your reader's attention ("As one can see on Chart Three: Enrollment Statistics"). Note that you also need to be specific in your reference.

When positioning the visual on the page, locate it as closely as possible to the point in the text where it is referred. Tell your reader what you want them to see, and how you read / interpret the graph.

Discuss one or more examples of something in the visual. Visuals should complement, not replace, key discussion in the text of the report. Complement the data in the visual by presenting it in a different form. For example, use percentage to complement straight numerical figures that show a decline or incline.

XIV.   Headings

Use headings and sub-headings generously. Not only do they make it easier for your client to read and understand the report, but headings also help you to reinforce the organization of the report.