It's not rocket science!

Making it as a business consultant

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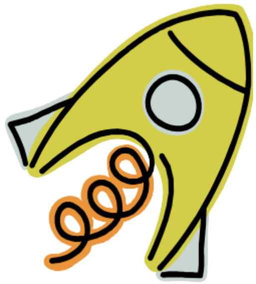
Chapter 4



Touchdown: doing the business

In this section we embark on the main mission of the book, the project delivery phase, where we identify the cornerstone practices that are the hallmarks of a successful consultancy.

By the end of this chapter, you should be able to:

- *Plan and expedite projects in a manner that utilises your skills to best effect for clients*
- *Understand the various processes and develop a deeper insight into the human dynamics of consultancy exercises*
- *Understand the issues accompanying various interventions and how the client/consultant relationships will alter through the project lifecycle*
- *Identify and analyse situations to prescribe key interventions which will benefit the client*
- *Produce accurate reports in an appropriate style and format*

Introduction

So, after a lot of hard work you have now finally landed the project and are about to commence the real work that you will be paid for. There is sometimes a slightly anti-climactic feeling at this stage, after phone calls, emails, meetings, presentations, negotiations and the initial euphoria of being told that you have finally been awarded the job. Sometimes it seems that so much emotional capital has been expended in getting to this stage that you feel exhausted by the thought of what the actual delivery of the project will require. On the other hand, you may feel more comfortable now that you are now dealing with a more controllable future. Whatever, you now must deal with a new set of circumstances, that of managing expectations, perhaps new facts coming to light and the practicalities of arranging and scheduling delivery, as well as juggling with your other on-going commitments.

So, what does a typical consultancy exercise look like? Naturally, it is not possible to cover the specific characteristics across all sectors but in this chapter, we will try to identify some of the generic consultancy issues that could be relevant across most projects. What lies at the heart of most consultancy interventions is that someone within the organisation is seeking to bring about a change or introduce a new process and has requested that a person external to the organisation supplies that expertise and resources to change those circumstances. The exercise may involve inputs that are tangible or intangible, and the results may again be tangible or intangible. It might be devising and delivering a solution to a problem, but on the other hand there might be no immediate problem, simply a need to improve or make changes faster or more efficiently than would otherwise occur.

As already been mentioned in an earlier chapter, in the wider economy, change is the consultant's friend, and so it is in the microcosm of the organisation, indeed a good strap line for many consultants in any field could be 'change master'. So, in this chapter we attempt to identify the commonalities of facilitating change in a typical business environment.

Aside from the management of change, successful delivery of the consultancy intervention will naturally depend on the application of your 'domain' knowledge and/or technical skills to the situation or circumstances pertaining in the client's business.

Naturally you should be confident in your competence in your area of expertise - you would not be considering consultancy otherwise, but what makes a successful intervention is the ability to present a cohesive 'package' of technical *and* process skills for the client. By so doing your reputation as a consultant will be forged - you become known as someone who can create and deliver creative solutions for clients leading to good results, leading to more referrals and a continued revenue stream. However, you mustn't get complacent and take your foot 'off the gas' in terms of marketing, and the search for the next project must commence right away, even as you go into delivery mode for this.

Although you may feel that you have spent so much time thinking through the project, the inputs, the issues, the outcomes, the plan etc in order to get the work, that you now know it all – it's not the case. It's true that you maybe can take some of that information forward, but you must also be prepared to discard it all if need be. What is facing you is a fresh page, and you mustn't let your technical skills drive the analysis phase of the project.

Change of phase, change of perspectives

Discussions leading up to the project award may have been bathed in a rosy hue of expectations and promises which seemed far away enough in the future for you not to be concerned about how and when they can be turned into reality. This is true for clients as well as consultants. But now things are different, and in the harsh light of day there is often a realignment of the discussion and relationships to reflect the new situation. To illustrate this point, it's worth recounting the old joke, about an elderly businessman who has a near death experience and is temporarily transported to meet St Pete (the managing consultant for the heavenly enterprise) at the fabled pearly gates. St Pete greets him with a wide beatific smile. Staggered by the glittering splendour, the businessman says that he is not staying, just visiting, but could he take a peep at what it's like beyond the pearly gates? St Pete cordially agrees, and first shows his visitor an environment called 'business heaven' a celestial golf course filled with elderly businessmen drinking and laughing to a soundtrack of birds and flowing water. The St Pete shows another scene, called 'business hell', an endless dark tunnel of desks with leaden faces of accountants, lawyers, tax officials, piles of paper forms and a background wailing of disgruntled employees and creditors. He shudders, and says that when he comes back could he definitely book a place in the first location?

Unfortunately, a month later, a hefty tax bill ensures the final demise of the elderly gentleman, and he fetches up at the pearly gates again, to be met by the same St Pete. But this time he looks a bit different, and instead of the welcoming smile he is greeted with a curt 'Hello, you are over there!' – pointing to the dark tunnel. 'But, but!' splutters the newly arrived businessman, 'it was only a few weeks ago you showed me a picture of a golf course, and people having a good time. What happened?' 'What happened?' asks St Pete, 'Nothing – but then you were a prospect, now you are my client!'

Of course, you would not want to adopt such an extreme change of viewpoint, but this shift of relationship, from expectation to reality, occurs on both sides, and the client will change their perception of you, as much as you do of them.

The culture and atmosphere of the pre-project world is different than the operating environment of the project. The world pre-project is based on optimism and hope, on things working well, with no interruptions, and delays. The real world is of course much more like a continued reality – there are problems caused by unforeseen external events, breakdowns, mistakes, accidents and in general, 'Sod's Law.

Managing expectations

What you are hired to do may vary enormously, but let's state the obvious - assuming your technical and project management competence, you will be glad to know there are only three underlying reasons for a consultancy exercise failing:

1. An unrealistic budget

2. Changing circumstances

3. Unrealistic expectations at the start.

Or any combination of the three. Whilst you may find it difficult to manage the first two, you do have some control over the third.

Why is it important? Because there are two elements to success – the actual, and the perceived, and there is usually a large element of judgement as to what constitutes a good outcome. From your side, it's easy to get carried away in the pre-project stage to paint fancy pictures of what you can achieve by the waving of your magic wand, and you do have to get clients to buy into a belief in your powers. But there's a danger that you oversell yourself and create a heightened expectation beyond what you can deliver in a normal business environment.

Clients are human, and it's only human nature to hold unrealistic expectations that their problems can all be solved by an external expert. Inevitably, sometimes these expectations are not fulfilled, and the shine goes from your reputation as a result. To put it simply, sometimes you need to be careful that you don't over hype your abilities, rather 'under promise and over deliver'.

Start with the end in mind

You must start with the end in mind. Deciding on what the success criteria for the project are in advance of the project starting is key to coming out at the other end with a good result. As an external consultant you bring both the expertise as well as the facility to focus on what is important; that is to isolate, identify, negotiate and agree the various aspects or outcomes by which the success of the intervention is judged.

Top Tip

There is an old management axiom which states that you can only effectively manage what is measurable, and what is not measurable won't get done. If you focus exclusively on measurable objectives beware that only the things that are established as objectives will get done.

You may already be familiar with the 'management by objectives' concept which has come in and gone out of fashion, in different guises, over the years. This behavioural approach works well in some areas, but not so well in others. For example, a technical consultancy might be hired to solve a problem in a factory or facility, where production is not profitable or has problems. The rationale for the project is clear, the objective is to solve the problem, and thus the success is easy to measure, by identifying the metrics, of output, efficacy, cost, profit etc.

There is a school of thought that states that you can't ever prove that anyone 'knows' or 'understands' something – the only proof is when that 'knowledge' is expressed in observable behaviours (for example when someone says that they 'know' how to drive.)

Measuring intangibles is difficult as it involves feelings, perceptions, attitudes, and value judgements that are affected by the prevailing power structures in the company and business environment. You don't want what should be a successful implementation regarded as a failure because you did not consider the context of the project. For example, you might deliver an excellent financial result for the company, but as a result have caused a dysfunction in the workings of a section, and they lose several members of key staff. Alternatively, you may not achieve all the financial objectives, but the project is deemed a success as there are intangible benefits – customer satisfaction, improved work flow, happy staff – which have been included as part of the measurement process.

In your project there will undoubtedly be areas that have tangible or measurable outcomes, but there also might be intangible aspects with harder to measure outcomes which may be equally important to the success of the project. Part of your skill in the consultancy exercise (perhaps working with internal staff) will be in identifying the measurable aspects and creating some tools to have a proxy for measurement in the intangible areas.

Top Tip

Don't over rely on just one diagnostic instrument or tool. There is an old management saying that if your only tool is a hammer, all your problems will look like nails!

Failing to plan, planning to fail

It might be stating the obvious but having things written down is a good way to start the process, and come to a common agreement as to what should get done, and when etc. This also protects you, as clients can change their mind, circumstances alter, and people forget.

A good basic project plan can be based around Kipling's famous 'six wise men' – Who, What, Where, Why, How and When - and then listing what outcomes should be achieved.

Imagine yourself into a situation where you are about to start a consultancy exercise. You are sitting in the client's office, on the first day of action. It becomes clear that the client is not clear about the outcomes and hasn't thought about the intangible aspects of success. Is this a good or bad thing?

You may perhaps think that this is an opportunity; there are more options to 'create' your own success, to model the project your way, and change the destination and of course elongate the journey (and your number of paid days!)

(If a client doesn't know what he wants - this is called the 'Columbus effect'. The famous navigator didn't know where he was going, didn't know how to get there, and didn't know what he found, but at least he was doing it with someone else's money!)

But, without a shared understanding, there is a danger that your definitions or actions are challenged later in the project. Also, ethically you must come to an agreement on the achievable outcomes to protect both parties.

It can be a delicate negotiation, as you don't want to give the impression that the client is incompetent and you don't want to go over his head to superiors to get clarity, but you should work with him or her to agree a set of objectives that you feel keeps both sides of the bargain and is workable. You must collaboratively work at that part of the process to make your success criteria clear. At the extreme end of this scenario, the ineffective client may well become dependent on you, for his success depends on you making him look good. However, eventually he will get found out, and shifted elsewhere, and as your contribution to the organisation's objectives are tainted by association; it's not good news for you.

You want to be commissioned by successful executives whose careers will flourish because of them making the appropriate choice of outside expert help. As they achieve promotions and move on, they will continue to consult you and your reputation will grow alongside theirs.

The world of projects

Basically, most consultancy assignments are 'projects' – something with a beginning, middle and an end – whether they are defined as such. As the external expert, how you manage the transitions between the three fundamental phases is what defines your success. If there is no beginning then of course you will not get hired, if there is no middle then there is no work done, and if there is no end, then it's likely that the activity has either been abandoned or absorbed into the mainstream.

The project management process, in summary, ranges from the getting to know you phase, to the research on the subject of the client business, and investigating the issues (internal and external), to the actual gathering of requirements, and the bringing together of your knowledge and ideas, to synthesise a solution, the development of that solution in partnership with the client's input, and then the delivery of the solution in partnership with the client's staff. Finally, there is the measurement of the impact of the intervention, through market acceptance, or sales, or by job improvement etc.

The project might be part of a larger programme which consists of multiple threads of work. Each of these may be a substantial piece of work, involving months of work, or maybe a simple piece of work covered by a few days' input. Your skill is in identifying which of these areas will be key to the success of the project – which to argue for an allocation of more time (perhaps at the expense of other tasks) and which to go faster through to balance the time/price ratio.

For example, in the initial phase, in your view it may be essential to go through all aspects of the research, through desk research, external market research and information gathering exercises, involving meetings, and intensive workshops, before arriving at a measured recommendation on the solution.

The project might then hinge on a full assessment and synthesis of the information and ideas into a workable coherent package, and then the presentation of that solution (or a range of alternative solutions) to the client.

The delivery phase might then involve training staff, running workshops, training trainers on the recommended solution or service, with the production of materials and with the development of supporting materials and other supporting activities.

As we operate in a less than perfect world where resources are limited, and things change, the trick is to be able to know within the context of the overall budget when to argue for more (or less) resource in each component part, with a view to achieving the desired outcomes.

Therefore, no matter what vertical niche sector or horizontal sector your consultancy operates in, there will be certain commonalities concerning projects and so you should learn the art and science of project management as it will certainly have a bearing on what you do. In simple terms, you are measured on not just what you do, but how you do it, and effective project management is key to the perception of the overall success of the endeavour.

Tools for the job

You will bring your technical skills to the job, and these skills may also involve using certain software tools which make the job easier to manage or better.

It goes without saying that you will have a laptop PC, with Wi-Fi, and be adept at normal PC packages such as Word, Excel and PowerPoint, and of course whatever email client works for you. The advent of browser-based application and cloud computing will no doubt affect the business and information environment before too long – and what it means is that your files and even your applications will be held or backed up centrally and accessed over a broadband connection. This means there will be less need for specific packages on your laptop or PC and our everyday business software will run in 'applets', and you will access the functionality that you need, when you want it. Sharing information is easy today but will become more so with seamless interchange between files on your computer and the shared central server. However, in the near term, most people will still rely on the Microsoft stalwarts (or their open-source equivalents) and you should have a reasonable level of IT skills to manage and document your projects.

With the advent of Wi-fi and mobile 5G you can access the web from virtually anywhere. Most organisations will have this facility, or if not will be able to provide access through a local network Ethernet connection to their router and thus the web. A VPN (virtual private network) may be a required option for you if you require more security than a standard service.

Leaving aside any specialist software that might be at the core of your consultancy offer, the tools that you may need to deliver skill in to deliver projects include (if using the standard Microsoft range as examples):

Task	Application
Create reports and various documents	MS Word or equivalent
Create professional looking documents for print	MS Publisher
Plan and schedule projects	MS Project or equivalent
Schedule time and people	MS Outlook or equivalent
Plot processes and organisational charts	MS Visio or equivalent
Create presentations and slide shows	MS PowerPoint or equivalent
Calculate numbers and financials	MS Excel or equivalent

(Note: MS packages are quoted here as they are well known, it is not a specific recommendation and there are alternatives that are available and may be cheaper)

There may also be a need to become adept at an art package that provides the facility of creating and editing images and a professional DTP package for longer documents or where layout is important and where there are different sorts of images, files and tables etc. Adobe InDesign is the defacto standard for this job at an affordable price point. You may or may not need a database application (like MS Access) depending on your work – but being able to create a database is potentially useful for holding your data and customer information.

You may need to develop your web skills, for example to be able to publish information on the internet so it's accessible for all, or in a private space for just you and your clients to see. This would mean developing your knowledge of how web editors work (ie creating HTML files) as well as how to publish the files via an FTP (File Transport Protocol) client and have a good understanding of relative directory structures etc so that the transfer will work. If this is not your bag, you could have available an associate who can perform these functions for you as and when they are required. The industry standard web editor is Adobe's Dreamweaver, though there are many free or cheaper alternatives like Xara Designer.

Top Tip

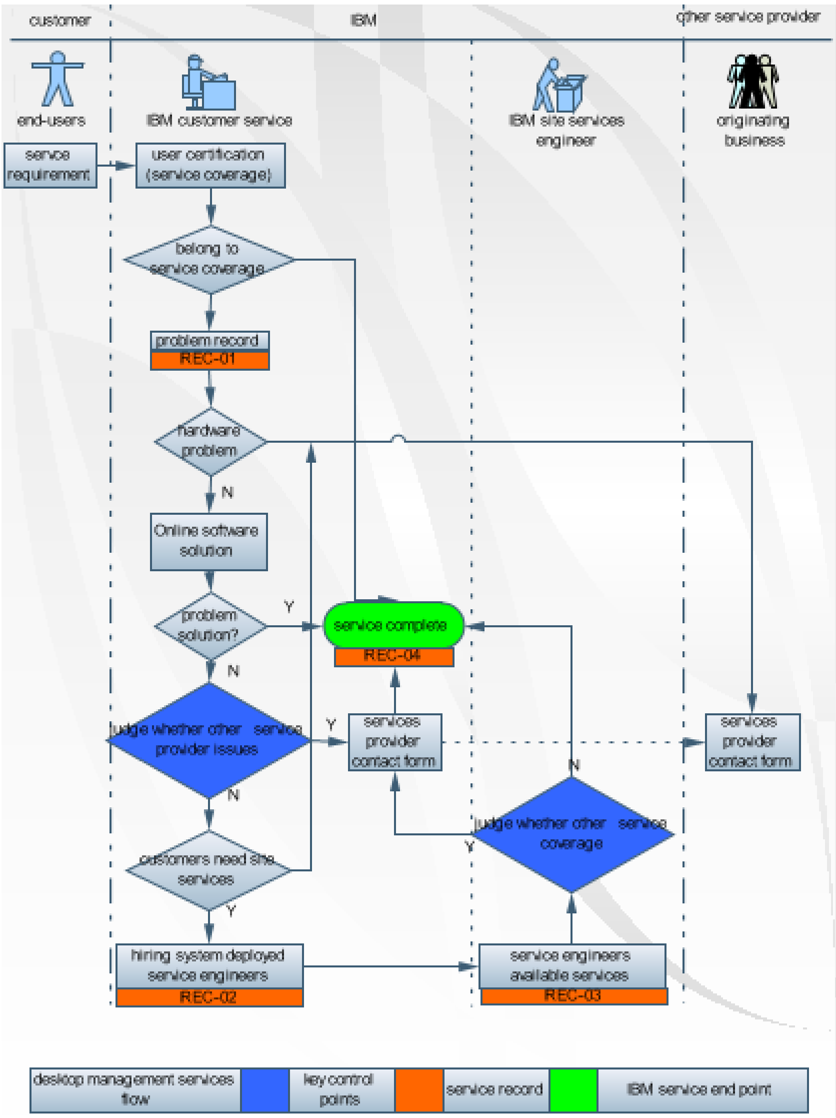
If you want to create web pages quickly and easily and not have to learn a new package or HTML code – then remember that MS Word can create web pages too! Just click on 'save as' and then 'web page'. Remember that the assets on your page will be saved in a folder, and that the page may render a bit differently in a browser.

Generally, in terms of the essentials, Word has become a good all-round tool for creating a range of documents and is now virtually a DTP tool. You can even create web pages, basically by exporting as html files. The key skills (from a non-technical business point of view) are to be able to:

- Create well formatted documents – with headers and footers
- Use templates – to save time in the creation of new documents
- Use appropriate fonts and formats – thought not too many in one document
- Import images and tables

Likewise, PowerPoint is a powerful media creation tool, and you can create slide shows and multimedia events simply by dragging and dropping images and sounds etc.

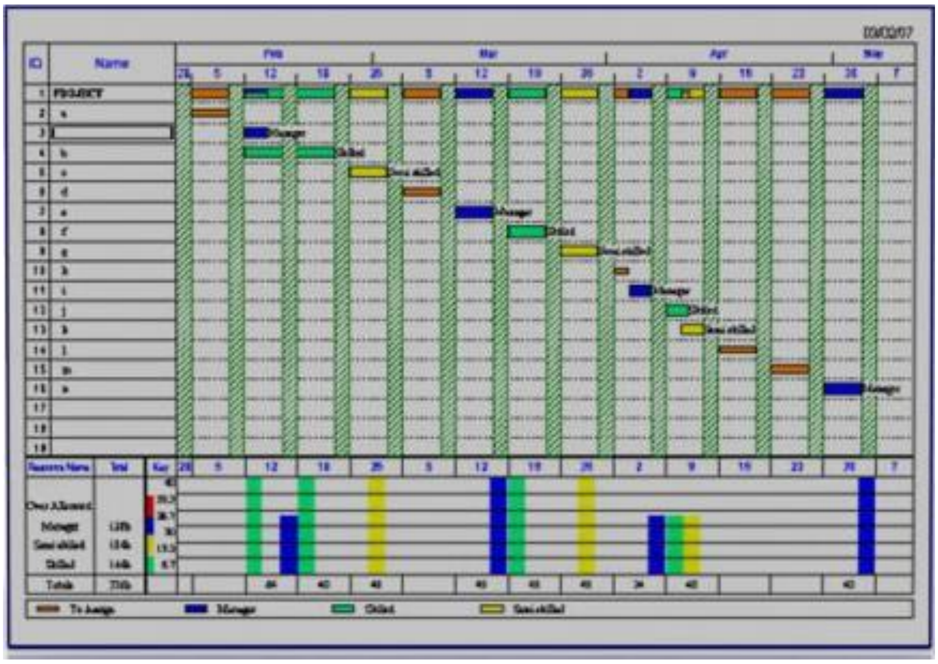
Visio is an excellent planning tool if you are involved in business process design or need visual tools for organisational charts. It has many uses, from creating flowcharts, tracking customers, products, information, or indeed any process. It comes with a range of templates and help so your output looks professional. For software design it also acts as a front end to creating actual software application (through a process like the UML language)



Typical Visio style flowchart – courtesy of eDraw (www.edrawsoft.com)

A quick search on the web will highlight products like Visio which are a bit cheaper – for example eDraw or Smartdraw (www.smartdraw.com)

MS Project has been mentioned in earlier chapters and it (or equivalent) is an essential tool for the project manager. Basically, a graphical tool of showing how resources are deployed over time, you list the task, the number of days and start and end date. Again, there are cheaper alternatives available on the web, with some available of a 'try before you buy basis, so it's worth looking around first.



(Typical Gantt chart – courtesy of Project Commander) www.projectcommander.co.uk

The spreadsheet is the other staple of the business professional, for handling numerical data, and you should be able to utilise most of the basic functions of Excel. It is a powerful tool - a programming language.

Top Tip

Remember that your clients don't need the actual application to view the outputs of the more expensive applications like Project or Visio. You can output as an image from importing into Word, or they can download a viewer from Microsoft's site that enables basic control over the file

Summary

In this introductory section, we have examined some of the issues you may be facing when you are about to commence a live project. So far you should have been made aware of the issues of managing expectations, being clear about the outcomes, understanding the balancing of priorities over the project, given the commercial and political imperatives that you will now be aware of, and have at your fingertips the IT tools that you need for the job.

This next section we will explore the generic skills and activities involved in a successful consultancy exercise by looking at these core components of most interventions:

1. The Project Lifecycle

2. Project Delivery

3. The Project Report

1) The Project Lifecycle

Taking a simple practical viewpoint, most projects involve the organisation and application of scare resources (financial, technical or human) to a certain task to achieve desired objectives over a defined period. The time dimension (namely beginning, middle and end) of the lifecycle is the critical aspect from a consultant's point of view as unlike a normal, internal management position, his or her financial success is dependent on being able to manage timeframes in a dynamic environment.

Having a strong strategic grasp of the project lifecycle concept is an important attribute of a successful consultant. This means being able to analyse and assess the various components of a project, both horizontally (over time) as well as vertically (by activity or inputs) at once and understand how these two elements interact and are connected. The project could be regarded as an organic entity being created or living within the host organism - the organisation. The development of the entity impacts on the host, and vice versa. Also, as you are aware things can look different (even behave differently) depending on where you are standing. Your view of the entity will change as you move from creation (in partnership with the client) to roll out. Like the famous experiment, where the scientist observing the subjects alters their behaviour, projects do not exist in isolation and your very actions will create a movement or reaction in the environment in which the project is delivered. This may be for better or for worse – but you should be aware of it.

The key element is that ultimately, it's the people that will make the project work (or not) – a successful consultant knows that, as they say, 'It's the soft stuff that do the hard things'. They also know that they must have the ability to be task oriented as well as empathetic to the needs of the people who are involved or affected by the exercise. Being able to weigh up and deal with the interpersonal issues, to carry the people with you, will contribute greatly towards a successful outcome.

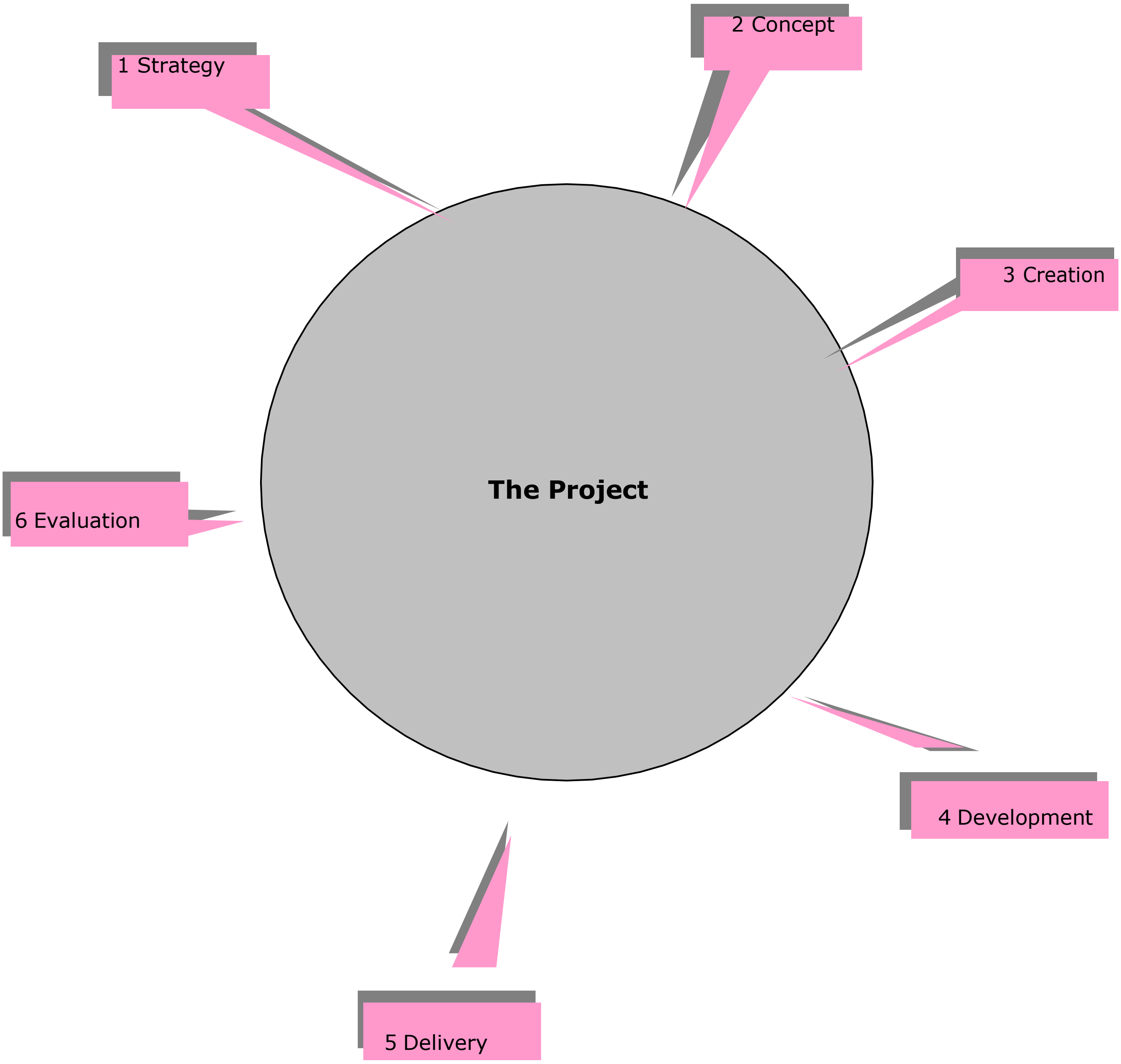
Also, your business experience will be able to inform you of the reality of the situation, where the problems can occur, to know what the things that could take longer than expected. The client will respect your ability and judgment if you can see the woods and the trees, the strategy as well as the detail of implementation, and understand the knock-on effects on their business. Brilliant delivery has to be connected to the real world of the wider business.

The Project Lifecycle – understanding the human dimension

The project lifecycle is probably known to you already – but in single word headings they are:

- Strategy
- Concept
- Development
- Production
- Delivery
- Evaluation

Diagram: Project Lifecycle



The following chart provides a breakdown of the questions ('6 honest men') relative to the phases of the project and the sort of activities that you should be considering in that phase of the project.

Phase	Questions/Activities
Strategy	Questions based on why and where: • Envisioning • Planning • Questioning • Testing • Consulting • Scenario-ising
Concept	Questions based on what, where and how: • Scoping • Delineating • Researching • Conceptualizing • Brainstorming
Creation	Questions based on how, and who: • Operationalising • Organisation • Mobilising • Preparing • Designing
Development	Questions based on how, when and who: • Organising • Producing • Delivering • Promoting
Delivery	Questions based on how, when and who: • Managing • Implementing • Monitoring • Checking • Testing
Evaluation	Questions based on what, why, how, when and who: • Researching • Collating • Analysing • Reviewing • Leading • Assessing

Typical activities in the various project stages

1) Strategy

Someone decides that a goal or objective is best achieved by establishing a time limited project. If the organisation is functioning properly the overarching strategy or mission of the enterprise provides the starting point of discussion on the strategy for the project: it cascades down towards the area of the operation in which the project will reside. At this very early stage it might well be the case the client has not even conceived of a 'project', simply that there is the perceived need to do something. For example, the client considers that there is a need to streamline the supplier base, or the need to make more money from international sales. They then consider that the best way to get a handle on this aim or changes is to place the activities under a 'wrapper' of a project, even though it is not totally discrete and cuts horizontally through all aspects of the organisation.

In these circumstances it is usually the case that the consultancy exercise is purely to help the company move from this stage to stage 2 (concept) and leave the downstream operational aspects to a future project, or even a different supplier. (So, for the consultancy, this becomes a project with a beginning, middle and end!)

It may be the case that the following stages are out to tender, and there is a clear divide akin to how elected politicians agree the military objectives in a campaign and issue the objectives to the Commander – who has the job of command of all the resources in that region to achieve those objectives.

Alternatively, it could be that the project strategy and the concept roll into the next stage and your job is to take the ideas forward.

There are many tools and techniques which can used to convert an organisational strategy into the aims of a project – ranging from the famous SWOT chart (Strengths, Weakness, Threats and Opportunities) to Force Field Analysis, and PEST (Political, Economic, Social and Technology)

2) Concept

At this stage, which might also be part of the research phase, the directors might issue instructions to create what could be described as a model or a diagrammed representation of the system or process that will deliver the end results. This would describe the various resources deployed, the time and effort required; perhaps various models or systems will be depicted, with a pro and con of each shown. There may be field testing of the concept to ensure its validity and there may well be site visits to places that have used that model or system to ascertain whether it would work in the organisation. The model would attempt to be realistic, but untimely it is a model, and has all the attributes of early-stage development, namely, results will not be the same as a live production environment when there are results that count. However, model building is useful if the shortcomings are recognised. Also, players in the project start to become identified with the various options or models and internal politics rears its head.

It may well be that you suggest the issue of a 'concept paper' (akin to Parliament's Green Papers) which flags up the concept to a wider audience and asks for comments.

(White papers are issued by the Government as statements of policy, and often set out proposals for legislative changes, which may be debated before a Bill is introduced. Some White Papers may invite comments. Green Papers set out for discussion, proposals which are still at a formative stage)

At the concept stage, there is still an open book with nothing ruled out in terms of new ideas, suggestions or processes that might bring a successful conclusion within time and budget. But of course, you should run a risk assessment over each concept and fully stress test any forerunners before deciding to go forward with one final concept into delivery or production.

The outputs from this stage could be an interim report to management making a recommendation on the sort of process or systems that would be best suited for the organisation as well as the cost benefits, comparisons with others and implementation issues.

3) Creation/Development

In this phase the decision as to what option to go with has been decided, and so the tasks move onto turning ideas into reality, putting flesh on the bones, and identifying the issues and processes in moving from back office or test bed into the delivery stages (or production) which the wider world will experience.

At this stage the skills required are of a more practical nature; now have possibly as a first effort to create an entity 'in the flesh' or to run a process for the first time (workshops or training sessions) this is akin to a road test. Some employees are cynical about the project as it's still only a concept, but direct participants are excited to see something take shape, and hopes are raised that the project will be deemed a great success when it eventually sees the light of day.

It's possible that towards the end of this part of the project, there is another stage of research and information gathering to consult with stakeholders to properly assess operational issues and get a reaction before the stage is completed – for example, a draft manual on the new processes.

4) Production/Development

Although this is the core part of the project it is often pressurised due to more time being spent in the early stages, eg getting sign off, than was allowed for. Of course, teething problems are to be expected, which were outside the scenarios envisaged by the planning committee. One issue that can arise is that the project is being developed under wraps, so is not visible to the rest of the organisation. The rest of the organisation is told to prepare for the launch on a certain date, and gears up for it, but has no idea of the internal issues going on with the project (think Terminal 5 here!)

For the people in charge of the production, delivery or rollout the first issue to address is whether the original project timeline is at all realistic or should it be re-negotiated at this point. This is a delicate matter as there is always a slight loss of morale when project plans are changed, and the further back they are pushed, the more chance that momentum is lost, and that other events will come along and change the parameters further. There are kudos to be gained by the manager of this stage to deliver against the clock, but he or she may try and amend the plan whilst their stock is still high, and they can blame the previous stage. Later on, this may not be the case.

5) Roll Out/Delivery

Perhaps overlapping with the production/development phase will be the delivery, as there will be a handover or 'train the trainers' activity. The people who developed the solution now pass ownership to the operators and those who will be affected by it. There are often a range of issues typified by:

- General resistance to change, - there will be statements like, 'it won't work in my area,' or 'they didn't ask us what we wanted', or 'it's not as good as the old system'.
- Interruption as people need time to adjust and attend training sessions.
- Confusion because of a change of supporting systems or procedures – eg call centre routines

This situation sometimes conflicts with the PR and other good news stories that the organisation issues at the same time, which was pre-planned as part of the release strategy. Sometimes there is a re-branding exercise or some other sort of public announcement that things will or about to be changed. This can lead to disillusion and cynicism amongst those affected – 'Things haven't changed for the better – it's worse. They don't know what it's like in the real world!'

Initial informal feedback suggests the need for changes and there are border issues as the system or product requires modification, but no one is sure who actually is in charge of that process – the field operators or the developers. Blame for any problems are placed to the least politically aware manager of the process. Gradually, however, things settle, and productivity will increase as people get used to their new role in the system. Some personnel migrate back to their previous roles, and some get promotion if they are deemed to have performed well and given other projects to manage.

6) Evaluation

As stated, all projects will have a beginning, middle and end, and what connects the end to the beginning is the feedback loop. One of the common issues about projects is that more thought is given to the first two than the last phase. A properly worked up set of objectives will have an evaluation criterion built in – namely how will we really k now if this has been achieved? How will we measure success? Therefore, it is possible to create the evaluation framework from the outset. For this to happen it means extending the budget and time frames to allow for modifying the initial concept and development documentation, but it is worth it in the long run.

This part of the process has to occur when the system or production/delivery outputs are operating in real circumstances, and there can be a considerable time gap between this and the project initiation. There is the likelihood of a shift of focus, and other business events becoming more urgent,

A small core team is left with the task of working out the lessons from the project. Occasionally an external consultant who has not been involved is brought in to provide a neutral viewpoint, but sometimes there is resistance to that as the learning curve is steep, the consultant expensive and the budget now all expended. Instead a senior manager is commissioned to conduct a review, but it's either not his priority or he is affected by the success (or otherwise) of the project and thus not able to provide a dispassionate critique, and he or she is also keen to not counter the prevailing consensus and ruin any chance of promotion as for many it is simply raking over the coals on something that has already happened.

For this reason, an external appointee is the best course. However, it is not uncommon for evaluations to be commissioned as a political exercise, and for externals to be directly influenced by senior management as to how to present the information. It's a brave consultant who will contradict their brief. To get round this, it's best to have some sort of 'get out' clause if you feel that interference makes the job impossible, and on a lesser scale, get assurances that whilst you understand the client's viewpoint about the project being an absolute disaster/unqualified success, you will prefer it if you can make some formal recommendations as 'options' for consideration. After that it's up to your skills to work around the power structures and present a report that does not directly counter your client's expectations – but through a process of engagement gradually modify them.

The clearer the objectives and the more complete the documentation throughout the process (ranging from the initial concept papers, resources used to the project plan) the easier the job will be for the evaluators.

The evaluation team would start by examining all the documents and processes from initial conception through each stage and interviewing all the main participants and users of the system. There would be a qualitative as well as quantitative element of the information gathering with the use of the appropriate tools, for example structured questionnaires, open questions, focus groups, anonymous interviews etc. The prevailing mood should not be one of blame for what went wrong, but what could have been done better. A summary of what was right, and what could have been done better should be made available to all participants and any following actions agreed with the clients.

Depending on what sort of 'tail' is required post project (eg a small support team, or integration of the project with an existing structure of a department) there should be a proper 'wind down' event. This provides the individuals who participated in the process, who maybe had a stronger sense of ownership to the project than they did to their previous department, a final sense of closure, a proper ending, and a chance to move on.

People will regard their time on the project as a 'war story', and so there is no harm in celebrating the 'process. This could be to hold some sort of formal event, a ceremony where the project 'flag' is taken down, and a few prizes or awards given out for meritorious behaviour. Without this there is the danger that a project rump survives and eventually becomes a counterculture in the organisation, and focal point for dissent and resistance to new initiatives.

Project structures and responsibilities

Managers have to work within their project sectors, and good managers can work across multiple sectors, but who is the spider that can run across the full web? The project manager!

This role obviously cuts across the formal lines of responsibility and can be difficult if the project manager is a more junior manager than the departmental or functional heads whose resources he must have access to.

The other formal roles within a typical project are:

Project Roles

- **Project Manager** - the person appointed by the project sponsor or sponsoring body to have overall executive control over the project and day to day running of the budget

- **Project Sponsor** – the person of body who 'owns' the project in the organisation, who originated it and has ultimate corporate responsibility

- **Project Evangelist** – there may one or several evangelists who are either technical leaders or are looked up to in the organisation and will be the opinion formers, though they may not be involved at the sharp end. It's likely that evangelist will be senior member of staff

- **Steering Group** – a large project which brings together many different strands might have a steering group, usually comprising senior figures that can represent the various interest groups and provide strategic advice to the working group and the project manager. They would report to the board on the project's progress

- **Working group(s)** – creating one or several groups may be useful to take the project (or a sub project) from start to end. They are usually led by an expert, or the PM, and may have departmental or functional heads as well as the domain experts. The PM would be most actively involved at this level. The group is seen as the engine room of the project – with the overall responsibility for getting things done.

- **Task groups** – short life task groups will be established drawing on internal and external resources, perhaps with the job of defining a process or coming up with a practical outcome like a solution to a problem.

- **QA group** – running parallel with the mainstream activities of the project and the various other groups will be the Quality Assurance group, established to monitor the adherence to any quality standards or system that the organisation may have. The QA group could also make sure that documentation and procedures were commensurate with industry standards, health and safety or other legal requirements, as well as to establish the parameters for the evaluation phase.

- **Various Stakeholders** – a whole range of parties will have a vested interest in the project, from the most senior to the most junior, internal and external, eg customers or other suppliers. The difficulty knows in advance those who do have a legitimate claim to be consulted

The issue for the consultant (or indeed any PM) is the overlaying of lines of informality across the formal lines and demarcations. Some organisations are very hierarchical, and some are flatter. (Note: most organisations are not as flat in informal terms as they claim to be in formal terms) It might appear to be democratic and open to crate lots of groups, but each one adds a large overhead onto the PM's role in terms of supplying information and feeding that back to the other groups. Generally, the more groups there are the more communication needs to occur, and the more the PM must work at ensuring a smooth flow across all the vested interest parties.

The project manager must be able to manage formal relationships across what will appear a tangled web of lines of communication and a landscape of conflicting political loyalties and agendas. There are pros and cons in having an internal project manager versus an external consultant:

Internal Project Manager	**External Project Manager**
Knows the people and agendas	Is not known to staff and does not know agendas
Has deep organisational knowledge	Has deep technical and process knowledge
Has other responsibilities	Can focus on the project
Driven by internal rewards system	Driven by commercial imperative
Seen as part of the establishment	Seen as an external threat
Swayed by all the more senior members of staff	Swayed only by the commissioning client
Success might lead to promotion	Not interested in a long-term position
Can get things done by direct request	Can only get things done by influencing senior members first
Has a job after the project	Must be successful to be hired for another project

Top Tip

If you want to slow a project down – give the client something to do!

The Informal Role

As well as requiring the appropriate formal processes in place, a project's success will be determined by how the informal processes are managed. The formal lines of management and communication can be subverted by problems arising from not understanding the dynamics of group interaction. It goes without saying that people are social animals and projects are people based, and the quality of interactions between people will determine to a large degree the outcomes of any joint endeavour. There are also social and psychological issues between groups that must be recognised in order that projects can progress properly or at least problems foreseen before they occur.

As you will be aware, in projects as in everyday life, there are always issues when you come to the borders of a territory, or the boundary between two sets of owners. The project management equivalent of these issues between sections is called 'boundary management'. What happens particularly in longer duration projects is that a sense of permanence is created (it's human nature to put down roots) and a power structure is created which revolves around the most powerful individuals which react against external forces. Problems with the project (such as delays) create an opportunity for the vested interests within the group to create a feeling of solidarity. If this happens in several groups it will give rise to 'turf wars', communication issues and even deliberate sabotage of the project.

Intra group issues

The commencement of a project will usually involve the creation of a group of people being brought together with a role or function to fulfil. There is a well-documented psychological process when people are brought together to perform a task. It is generally recognised that they experience four phases, namely that of forming, storming, norming and performing.

The phases are self-explanatory, but here is a very quick explanation of what could happen in the course of a typical project: (refer to the diagram overleaf)

Forming

a) At first when strangers first get together there is a degree of confusion and suspicion. People don't know the rules yet, the objectives are unclear, and the 'power' lines are not established. They might have allegiance to groups outside of this group, and they might not even want to be part of the group.

b) The initiation and 'get to know you' sessions are over, and a reasonable way of working is established as order is created – that works temporarily. Gradually the landscape becomes clearer – but they are not yet good at working together as they don't know each other's preferences, they don't want to step on someone else's toes or exert authority. However, managers think that things are going well.

Storming

c) The confident members now start to exert their authority as they know the consequences of their actions, people's likes and dislikes are being voiced and subgroups forming. There is also some confusion as to the desirability of the objectives, so a struggle for the ends as well as the means takes over the ethos of the project. Basically, there is a jostling for power and recognition from the perceived leader – who might not be the formally appointed manager.

Things go from bad to worse. Some event catalyses a change of mood or approach, and progress stalls. There is a 'clear the air' session and sometimes the splinter groups or powerful individuals are held responsible. Occasionally a member might be asked to leave the main group if their behaviour is regarded as extreme, or they cannot buy into the re-adjusted values of the group. There is a consensus that the project must be brought on track, and members informally swear an allegiance to the re- formed entity.

Norming

d) After the new start things improve, mainly because there is a joint feeling that a bridge has been crossed, but also because a division of labour emerges and the ones that are good at organising take over and give things to do to those who are happy to them. There is a deeper human element to the group, with more social interactions taking place, and a feeling of permanence.

e) However, there can be an upset to the status quo, as external reality or the cold light of day shines in. Managers outside the group have got complacent as time has moved on, and they now realise that the project is badly off track with the original timescales. Senior Mangers now realise that they were unrealistic but the individuals (middle managers) within the group are usually blamed for the lack of performance, for 'going native' and not driving the group harder towards results. Heads may roll and a new manager with a reputation for getting things done may be appointed (with extra resources if need be) to complete the project. This generally causes another drop in productivity as the changes have to be absorbed by the group.

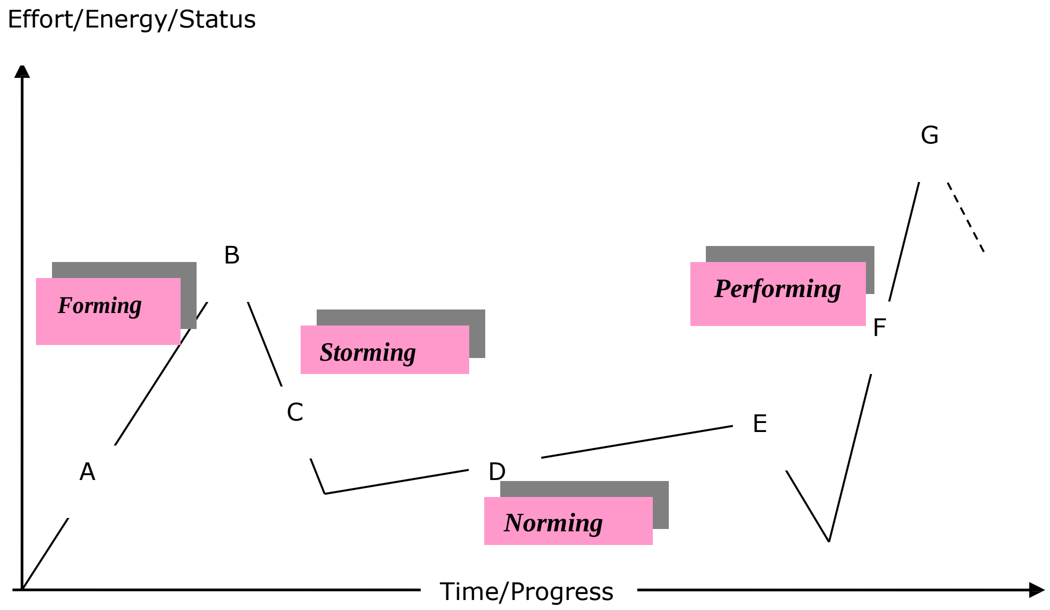
Performing

f) Another clear the air session occurs, and incentives are offered to get the project on track, or timelines re-negotiated. The achievement of the goal is emphasised, and the picture of the end is vividly painted – with exhortations of 'we can do it with more push!' Sometimes an expert or 'mid-wife' is brought in to oversee the difficult transition or birth of the infant. Progress resumes, as more resources are poured in, and members work overtime to meet the deadlines.

g) The summit is achieved – the last few days has seen gargantuan efforts and weekend working but the project was finally launched on (re-negotiated) time, the goal is reached, and the champagne uncorked by the MD who expresses his deep feelings of gratitude to the project team before leaving for the press launch.

h) The project team experienced an anti-climactic feeling as the post project wind down occurs. The senior manager takes a well-earned break, and the members drift back to their departments. Some members leave to get better jobs and the project manager must now think about the report and review and wait for the next project to land on her lap!

Diagram: People in the Project Lifecycle



Status

A – Project joining, initial scepticism, worry

B – Enthusiasm, potential, new faces

C – Confusion, disillusion

C – Reality, hard work, aligning interests

D – Stability, pattern, progress, learning

E – Upset, personnel issues, missed deadlines

F - New patterns, revised leadership, end in sight

G – Progress, elation, attainment of the goal

H – Ant-climax, wind down, debrief, stories.

There are various elements or attributes of these phases that are important to be aware of - most arising from the human dimension:

Project Issues

- Someone somewhere must decide that a change or a certain output is required. That person or people have ownership of the enterprise but may pass the baton to the managers of the next stage, who have their own agenda (and skills), so there are ownership issues as well as possibly misinterpretation of the original aims and objectives.
- Once instigated, there is an internal, dynamic process driving one stage to the next, and in the transitions, what are called 'boundary issues' between the stages can arise.
- Sometimes the internal workings of each stage create their own themes and sub-projects, giving rise to internal management issues.
- Generally, it's the case that the more senior staff participate in the front-end activities (strategy, concepts etc) and pass on the development and delivery to more junior staff with less discretionary or budgetary powers.
- There are sometimes unrealistic objectives set for each succeeding stage due to inadequate information, overruns, and the need to try and catch up with the project timeline.
- There is often more time proportionally given to the front end (the start) and less to the end (the follow through) due to time and financial pressures
- Evaluation is rarely conducted properly. There are few benefits for managers to find out that the project was not as successful as they would like others to think. However, organisationally, this leads to a poor feedback loop.
- Some people's skills are better involved in certain parts of the project lifecycle. For example, a critical thinker may not be the best person to be involved in the brainstorming or concept side but would be better suited to come in later as a reality check.
- Most people will focus on what they are good at, or where their vested interests lie (eg department level heads will act on issues which affect their own interests or performance measures) rather than the overall business).
- At the end of the project there is a tendency for group members to stick together and have a reluctance to move on.

Inter-group Issues

Despite the intragroup issues that have been depicted, forming a group to perform a task has obvious advantages: a division of labour according to specialisms, support etc. However, when groups are formed, and have to relate to one another for the accomplishment of a 'common goal' there are always issues that can affect the outcomes. Most of these issues are well known - territorial turf wars that can spring up, and uncontrolled competition.

There is a need to try and balance the good aspects of intergroup rivalry to achieve the best outcome for the organisation. For example, to achieve something against the clock it's sometimes a good idea to create a competitive element in order that the groups will spur each other on. Too much and it becomes an end in itself. One group will try and blame the other for its misfortunes. The corresponding negative issues mean that stronger internal bonds are formed by the competition, but these are harder to remove afterwards. Outsiders and strangers can be stereotyped and generally depicted as a threat. So, if the groups have to be reformed and mixed there can be a longer period of re- adjustment of values.

Evaluation and feedback loops

In life we generally have feedback loops to tell us how we are doing. These can range from the very instant (eg via the steering wheel of a car) to medium term (eg your bank statement) or more long-term feedback loops (eg like exam results). Generally, we consider that a good feedback loop is one that keeps systems running effectively. Simply put, this is simply communication (sometimes synthesised to give a meaning) and then fed back into the system or process that is producing the information and this is compared to what should be the case. On a personal level, without feedback people will either lose momentum, not knowing if what they are doing is right, or lose heart and think what they are doing is wrong.

In a long running project, there is a need to feedback information into the system to try and make amendments to objectives or the means of achieving them, on an ongoing basis, (sometimes called formative evaluation) rather than wait till the end, and everything is done and dusted. (summative evaluation). The difficulty is trying to plot the places or stages where this can occur and there are always time pressures to move on to the next stage. Verbal and informal feedback should be given by senior managers to project managers on an ongoing basis, but there is also a need for some metrics to keep each component part of the project on track. In the optimum model there would be a specification for each part of the project and the facility to allow those involved in the process to see what they are creating or building etc.

The trick to maintaining a high-performance level is to give feedback that is frequent, focused, relevant, and critical, (but not overly so). It should also be objective but be careful that objectivity can come across as systemic ie that there is no personal involvement from the person giving the feedback and that the 'judgment' is against the person. If it's done timeously then behaviours can be altered, and mistakes rectified.

Done it? – Prove it!

The other important aspect concerning having a sound grasp of where and when the project stages occur is that the end of each stage might form a natural 'sign-off point' for the achievement of a certain set of objectives, and thus engender a payment. Whilst this is easily agreed up front, and indeed is logical, what can occur is that the project gains momentum faster than the planning team thought and the sign off documents gets lost in the system. It's easy for everyone to forget in the heat of creation that the most important document from the consultant's point of view is the one they need to raise an invoice. Consultants can force the issue by saying something like, 'Sorry to be a bit pedantic, but since we have reached the end of the concept stage, before we go to production, our internal QA system requires that we get your sign off – here's the document'. It's funny that when clients must sign something, they suddenly start to become clearer about where they are and what they want. The reason is of course that they can't fudge the issue of things go off kilter later, whereas with a verbal sign off they can say, 'Well, to be honest I always had reservations about that design.' If things go wrong after this the balance of power will reside with the client. Therefore, consultants should be firm and stick to their documentation process – even if it means a slight delay (which you may be glad of) whilst the project manager confers with their seniors. You should also be sympathetic to the fact that the client is putting their reputation alongside the consultant's when they sign, and if anything does need fixing post that stage, it should be regarded as a joint problem, not just the client's.

There are few projects that do not endure some issues or problems over the course of their life, and the main one is time over runs, (eg things taking longer than was allowed) as well as what is called 'project creep'. This is a general term for when the activities of the project start to deviate from the original aims or specification. Perhaps people get enthused about a certain aspect and want to argue for more focus or quality on their part, or perhaps there is a 'bolt on' from senior management. Once people get embroiled, they can lose sight of the original intentions, or quite simply they did not really know the extent of what was required for the final product or service in the first place, until now.

From the Project Manager's point of view, it's important to remember that it's like a ship navigating an ocean – in the sense that a few degrees of deviation at an early point in the journey will result in being off course by many miles at the end. Once the deviation is noticed it should be corrected, as later corrections involve a lot more distance and effort. Only very rarely does the ship auto correct and find its proper harbour of its own accord.

Documentation and change requests

Whatever the reason for the changes, they will occur and what you as a consultant must build into your system is a 'change request sign-off' form. A simple request from the client can, unbeknown to them, result in a massive amount of work for you. This is particularly true of technical projects where ad hoc requests for enhanced functionality like an extra button on the screen can have effects across the whole system. The client will state that they did not know that this was an essential item until this point in time – maybe they had to see what was not there before they realised that it was required. You are now in a difficult position, as even if the project is on track at this point, the changes will delay the project and if you don't do them, it could cause resentment between you and the client. It's not just the one-off change that has to be accounted for, any change that results in you consulting more people, in different locations, or involving more groups, means more on-going overhead, as each of these must be kept 'in the loop'.

The best solution is of course not to get into the situation in the first place:

- At the start of the project, state that you will utilise a **change control procedure** as a means of protecting you and the client (by ensuring an orderly project etc). Most clients will agree to this.

- Create a good dummy, model or **demo** to get around the 'look and feel' issues and from that prepare a clear design specification. Do this mockup quickly and don't agonise over it.

- Create a **functional specification** and **design specification** which should be clear about what is and what is not, in the system or process.

The change form is a very simple document – and should contain:

1. The Statement of Work required to make the change
2. A time and cost estimate
3. Resources required
4. Any knock-on effects/risks that are foreseen (if any)
5. A space for the client's signature and date

Over time there will always be some small changes which are desirable, and you may want to concede these at no cost for the greater good, in order to keep the relationship sweet, but you should still ask the client to sign the form!

Top Tip

The IT manager can rarely say 'yes' to a project outside the IT department – but can invariably say 'no' that impacts everyone!

2) Project Delivery

Project consultancy skills

In this section we will examine at the generic consultancy skills involved across the project lifecycle, and these are:

- Gaining and handling information – ie asking the right questions in the right manner
- Summarising and synthesising information into meaningful data
- Creating solutions to the problems
- Presenting and proposing solutions – in both formal and informal settings
- Implementing solutions

To do these things effectively a consultant will need to be a master of:

- Time management
- Managing transitions and change
- Project development and implementation
- Presenting complex concepts in an easy-to-understand manner

Delivery Process

Deciding how, where and when you elicit, or present information is an important skill that can define a good consultant. After all, if you can't get to the bottom of the facts, then you can't make a good judgement or prognosis on the solution!

Whether it's in initial scoping interviews, in-depth interviews, desk-research, leading a workshop, presenting interim findings or the final report, a consultant will need a wide array of people and information handling skills to work across a variety of projects.

In the first instance, we shall presume that your writing skills and grasp of written English is excellent, so we only need to examine the information side. If you think your writing skills leave something to be desired then you should endeavour to brush these up quickly, and utilise spell checkers, a thesaurus and dictionary when preparing reports etc. It is stupid to ruin a well-researched and presented report with spelling or grammatical errors

All project assignments are unique, but if there is a commonality of process to be found it is probably in the realm of information handling, namely.

- Information gathering
- Conducting formal and informal interviews
- Note taking
- Summarising

- Presenting
- Report writing

All stages of the project will involve to some degree the handling of information and the translation of that information into meaningful data. This is particularly true at the beginning (research) phases) and end (evaluation) phase. There is what is called a taxonomy or hierarchy of skills involved with information gathering at its base moving up the skill levels to synthesising at the top.

What you are actually doing involves a range of skills eg:

1	*Communicating*	Being able to coherently explain the results of the exercise using an appropriate language for a technical and non-technical audience
2	*Synthesising*	Bringing all the conclusions together to create a solution that contains the best elements as well as added value or creative use of resources
3	*Analysing*	Summarising and weighing up the information and identifying the workings and dynamics of the information related to the issue in hand Concluding
4	*Sorting*	Sifting, comparing, measuring, and assessing the information
5	*Collecting*	Information gathering and collecting

As someone who is politically savvy, appointed by the prevailing power elite, you should be aware of a further level of the taxonomy to communication, which is called, in management speak, 'influencing'. Influencing is often seen as a Machiavellian activity - 'persuasion to get your own ends'. (Apparently Machiavelli was not as black as he has been painted by centuries of management writers who have portrayed him as the exponent of dark, dastardly deeds that he employed in the court of the Medici's. He was simply a shrewd political operator and an early student of power in organisations.) Wherever your 'court' may be, there is no harm in doing your best to persuade others that your considered view is correct, but there is a distinction between being persuasive, and engaging in back door deals that negate the work of others.

When consulting with organisations and at the start of the project, no matter what the area, sector or task, consultants are often requested to' go find out the facts', or 'find out for yourself what the issues are'. The key attributes of a good consultant in the information gathering stage are to be informed but not judgmental, being open to others, but not gullible, and focused but not inflexible, rigorous but not closed to intuition. It can be a real effort to keep an open mind all the way through this phase, when you think you see the answer staring you in the face, but you must hold back as at a later stage of the exercise you can exercise the skills of analysis, assessment, prioritising, and judgment.

There is not enough space in this book to go into the wide variety of tools and techniques available to the consultant. There is extensive literature available on how best to design and conduct research exercises. For our purposes we need to know what the commonsense elements are, and if there is a need for a specialist approach (perhaps in the interpretation of the data or the statistical computations) then you should involve that expert in the first stages of the research design, for as they say 'rubbish in, rubbish out!

The quality and quantity of the information you receive will depend on the questions you ask, and how you ask them. To properly tease out the issues you should think through the whole scenario of not just how, but where and when the questions are asked. A verbal interview may well provide a different level of information than that provided by a written questionnaire. An interview in your office a different response from that of one conducted in the client's manager's office.

You may opt for a written information gathering tool if anonymity is required, or if you want to systematise the questions and deploy various third-party researchers.

Generally, very sensitive information will not come out via a written response unless there is an absolute guarantee of anonymity. Respondees will regard the consultant as being in the employ of the management, so there will have to be safeguards offered to people so that their responses are not traceable. Sensitive information may come out in a one-to-one, but that will depend on the person and the feeling that they have that the consultant can be trusted. But by and large people will not divulge what they think will jeopardise their standing in the organisation.

After designing your interview or research gathering tools (whether a formal or informal questionnaire) this should be field tested, and then signed off by the client. You do not want to go through the exercise, spend all that time gathering information and then be told by the client that 'I thought you were going to ask about x!'

Generally, you would want to employ a mixture of open questions and closed. The closed questions (those that have a specific answer, like yes or no, or black or white) are more suitable for when the information has to be quantified, ie turned into numerical data (ie 37% preferred black) and open questions (What, Where etc) are more useful to get to the underlying issues or qualitative data, but of course it is harder to compare and make statistical analysis from this data, and its open to interpretation.

Using open questions (what Kipling called the '6 wise men' that we met earlier) is a key skill of the project researcher. For example, to engender an open discussion you do not want to close off the information gathering or research too early so you would use – opening out' questions type questions.

- Why
- What
- How

Are then move onto the more 'closing in' questions, which are to elicit the details.

- Who
- Where
- When

Ideally you want as much information as possible, and therefore the mind set at this stage is to rule nothing out, do not have pre-conceived ideas, and guard against influences from internal and external forces. You might call this early stage the 'blue sky' thinking, creative brainstorming stages, where you do not need to pay heed to reality. This is a benefit and a problem of course; as one person's brilliant creative idea is another person's stupid suggestion. Suffice to say that the rules of the game would include a:

- time limit on each concept discussed
- no criticism of other people's idea

Combined with the 'nothing is ruled out at this stage' mindset, is the facility to hold back on the use of your favourite tools and techniques – there's always a predilection to fall back on the things that worked previously, just as there is a tendency to step up to the role that you consider you should occupy as that of expert.

As the project is new, and you may be unknown to the clients and their senior staff, so there is a tendency to try and impress them from the start with your command of the subject, which leads to:

- Talking too much
- Trying to impress with your technical knowledge
- Trying to be right all the time
- Underestimating the skills and knowledge of the 'locals'

What you inevitably find if you keep an open mind is that the lowliest employee has built up a great reservoir of knowledge about how that organisation, and their role within it, works. It's quite humbling to find out that you indeed do not know everything there is to know – and that someone who is paid considerably less than managers (and you) hold a great many of the answers to the problems. It's just that their voice is not listened to, whereas yours will be. So, if that might be the case, you ignore the information gathering side of the project at your peril.

Of course, your job also involves the amalgamation of a lot of ideas and ambitions so the reason why you are paid well is that you have to try and rationalise one cogent argument against all the others that you are being presented with, taking into account the prevailing management wisdom and opinion. Then you realise that the solution seen from one department can look totally different than from another. At this stage you might realise that maybe a) the management are not as incompetent as you thought in keeping the organisation going and b) that there is a more difficult job for you than you thought, because there are so many answers and all conflicting!

The importance of being factual

The most important thing in the information collection stage is to make sure that any hard facts that are crucial to the investigation are gleaned. Facts and figures sometimes seem to carry more weight than they should, as when a figure is presented in the report, it carries more weight than an estimate or guess, even though the methodology in arriving at that figure is suspect. For example, which of the following sounds more convincing?

'It was found that 32.85% of all respondents were in favour of the changes'

or

'It was found that around a third of all respondents were in favour of the changes'

Utilising facts and figures that are based on sound methods and adequate sample sizes lends an air of authority and exactitude to your findings. You will also be aware that some clients love facts and will concentrate on these, whilst others will look for interpretations and general conclusions, owing to the issue of sampling errors. Some clients are fixated by numbers – while some ignore them. Obviously, you must be aware of both is fact as well as the sample size when deciding how to process and calculate the figures in the report. Any sample of less than 100 must have a sample error built in if you are using percentages to quote results, though it's not unreasonable to use % in smaller samples if you quote the size. It's obvious that if you have interviewed only four people, two of whom agreed with the issue, then saying that '50% were in favour' is true but will not carry much weight!

The way you remember facts that are given to you is by taking verbatim notes. This is a skill that should be developed as it quite difficult to have a discussion with someone and at the same time write the details down. Of course you can record the conversation for analysis later, and that works well unless the respondee is intimated by the recorder. If you are using written notes, then:

Keep them short – unless you are asked for totally verbatim accounts and keep the flow of information going by encouraging the respondee, then saying, 'OK I have got that but just let me make sure that I have got the all the points down.' (then summarise back whilst writing)

Top Tip

If it's important to get quotes, then make sure you ask permission to use their quote and if it can be attributable to them.

It's amazing how when you get back to base to write up the findings the details that you noted at the time are not as clear as you thought, so it's always wise to ask for the respondee's email address and their permission should you need to get back to them if there things to clarify.

Managing groups

A consultant will often be called upon to present, lead, manage or facilitate groups to gain information or to present it – and sometimes both together. Having a high level of presentation and group handling skills is essential if:

a) You want to be able to effectively impart information and manage the project

b) Your desire credibility as someone who can 'take people with them'.

In other words, there is a psychological perception as well as a practical dimension associated with this role. As the famous saying goes, 'The medium is the message' – how you say or present things is sometimes as important as the content of the message.

Whatever the purpose of the activity, whether at the initial information gathering or issue determining phase, or presenting information, concerning the findings or final reports the circumstances could range from managing, presenting or facilitating, in a timetabled or impromptu setting, for example:

- One-on-ones
- Small groups
- Large groups
- Workshops
- Meetings

What is often not recognised is that the art of the group facilitator or leader is in what happens off stage as much as what you see 'on the stage'. The common issues, which if not addressed will cause the session to come to grief (or at least not fulfil its aims) across any of the above sizes of group in different situations concern:

Group Presentation Issues

- **Focus on the aims of the session** – what exactly are you trying to achieve?
- **Get the appropriate pitch for the audience** – is the prior knowledge sufficient, and is the information at the appropriate level?
- **Check for environmental issues** – does the room or hall have the right lighting, ambience and acoustics so everyone can see and can hear? Are there enough seats? Is the temperature control good? Is there sound leakage from outside?
- **Choose appropriate means** – is the type of session, small group, one on one, right for the aims of the session. Are the visuals or media appropriate to deliver the messages, and should there be interaction between attendees?
- **Allow enough time** – has enough time been allowed for each part of the session, coffee and comfort breaks and interaction?
- **Check for proper access and facilities** – is there a car park outside? Is there proper access for disabled? Are rest rooms and snack facilities available?

Suffice to say that there are a huge number of variables to be catered for in planning and leading a group session. These should not be ignored or taken lightly, so when the client says to you, 'I presume it's OK for you to facilitate a couple of sessions to tease out the issues and kick off the project?' – be aware what you are getting into! We have already mentioned the political issues which will exist at the start of the project, and the fact that people will be curious as to who you are, and what you can do, but their agendas might not be fully attuned to the needs of the project and a poorly planned or expedited workshop might swing their intentions against you. Also, the dynamic of the group may depend on whether the event is held on-site or off-site. If it's held on their premises then you are in their territory - some might regard you as a guest, and be polite, and others as a threat and be negative.

There are some people who hate the thought of any form of public speaking to groups, large or small, some who don't mind and a few who even seek out the occasion. You have probably met some in each camp. You don't have to be an out and out extravert, and for most purposes you don't have to be a professional trainer or presenter but adopt a functional approach which should suffice. Keep it simple and clear, namely, 'Tell them what you are you going to tell them, tell them, and then tell them what you have told them!'

There are many texts on how to organise and deliver training or present to groups – and for our purposes we can focus in on some very essential aspects as seen from the general consultant's point of view.

You may or may not have had previous training in how to present or manage group activities, but you certainly would have experience of some very good ones and a lot of very bad ones in the past. It's always useful to pick out the good parts of other people's skills that you respect. While some people are born presenters (though very few) basically any one can be trained to improve from the point where they are at, to a reasonable level to handle any of the above situations if some common basics are attended to, which are to have:

- A sound knowledge of the subject matter
- A solid structure – with a beginning, middle and end
- Clear and confident speaking style
- Appropriate visuals

Once the 'basics' have been mastered then the more advanced 'intangible' interpersonal skills which include enthusing, envisaging, motivating, persuading/influencing can be worked on.

One-on-ones/two

Sometimes you are asked to present semi-formally to one or two people. In this type of session, you can be flexible as there is more of a conversation than a monologue. You can say before you start and deliver the presentation that you stop at any point and since you have an audience of one, you detect if the other party is starting to drift off or become less interested in what you are saying. You need to keep an eye on the time if the presentation does turn into a conversation with lots of questions as you may have kept the important information or slides to the end.

Small and Medium Sized Groups

A small group session of between 4 and 10 can vary enormously in character, from the sort of approach as defined above to a more formal 'speech' type scenario, so what follows relates to a typical 'facilitation' scenario.

There is a formality about the occasion. There is a time slot and people are invited to attend. Now whilst they are expecting to impart information (ie to be consulted) they also expect a high degree of organisation and some level of content expertise to be available. What that means is that if you are a non-technical consultant handling a workshop where technical issues are key to the outcomes, you will need more than facilitation skills to hold your own and gain the confidence of the attendees. Your client should provide someone (perhaps themselves or a senior member of staff) who can fulfil that role. Then you can concentrate on getting the discussions going and capturing the information.

A small group will have a particular dynamic, depending on whether people already know each other or not. Typically, some will, and they will therefore club together. They may act as a force of resistance, so you should try and break this up by re-arranging the seating. Some people rely on icebreakers, and some people dislike them as contrived, but a good simple ice breaker often works, eg ask them to turn to their neighbour on the left and introduce themselves and compare what they would like out of the session. (You could flipchart these responses)

Next, you should introduce yourself, and without boasting slip into your qualifications as to why you are involved in the organisation. Include where you previously worked, other clients etc and perhaps some personal information could be included eg family, hobbies, football allegiance – but be careful!

Then explain the aims of the session, and how it will work – ie who will do what, who will take notes, who will report back, what the information will be used for. Then explain the domestic arrangements, meal breaks etc

There might be a need for a keynote or starter presentation. Sometimes this will be you, but if there are two people presenting and facilitation then the roles could alternate. This provides the background, the rationale of the project, and the context and why its important, why people are being consulted, and to motivate them to participate.

Then the strategy might be to put a couple of questions on the flip chart which they have to address. A larger group (of say 10 to 20 people) should be divided into sub-groups, so everyone has a chance to speak. In a large group there are always individuals who feel shy and don't want to raise their voice, but whose views should be heard.

There may be handouts or other means of instigating discussions, and the presentation might be high tech or simply a few slides. (The pros and cons of various message delivery methods are detailed below in the large group section)

You could ask the group to elect someone to report back to the main group (if you think this will be an issue then you should simply ask someone if they will do it) and then give them enough time to address the questions.

Remember it's a facilitation session, you are the leader and effective facilitation sometimes means taking on a range of roles, including the authoritarian one – at this stage to make best use of time you should be quite directive and tell people what you want. This inspires confidence in people that they are in the hands of someone who knows what they are doing. If you always say, 'Can you do this but it's OK if you want to do it another way' – it will confuse people.

While they break into smaller groups – perhaps by re-arranging the chairs or going to another room, you circulate amongst them, but only to listen. You may have to arrange or prepare the next session. The reporters then put their flip chart on the stand and go over their findings. At this stage you take a step back, as they should be interacting between themselves, not presenting to you. Your role will be to summarise the overall conclusions,

Top Tip

The key element of summarising group responses is that you use *their* words. You are the conduit, and they should own the findings, so you don't want to bend the information by your choice of language.

There could then be a break, another presentation and a repeat of the exercise with groups re-arranged where the other issues are addressed, or the same ones evolved to the next stage. If it makes sense the attendees could be placed in departmental groups to address common problems.

If you are using videos to illustrate a point these should be contextualised. Don't overdo it and keep the clips short unless there is a real need to show the whole programme. Remember, after showing the video, there is a need to somehow bring people back to the present, or create a break, as TV can induce a passive state.

Try and get the main part of the work done in the morning, with the PM for reviews and group sessions. Even though there is a need to keep people awake after the after-lunch session, don't overdo it as the biggest drop off is around 4 to 5 pm.

At the end of the session, you should collect the paperwork or flip charts, write up the findings and circulate them for any further comments.

Presentations and Speeches

Larger scale occasions could require a larger group facilitation session, a presentation or a more formal speech. The scenario for this could be as follows:

The client has requested that you should make a presentation of your interim findings report to a wider group of 50 managers. There is a need to be able to get some feedback, as there will be issues in implementing the findings, so you need to facilitate this. You agree that there should be a formal presentation of the report and then a facilitated workshop session.

This event takes careful planning, as there is a more formal element to it, with expectations of a 'performance' of the unveiling but also a need to organise the larger group into the best formations in order to get feedback. In fact, the 'speech' type input is the easiest of the group activities to prepare for as you are in control of the inputs and can time it accurately. When you are organising and facilitating groups you have to be more re-active and are handing control of the process over, so there is an element of risk involved.

The presentation sections would involve you using PowerPoint slides and giving the staff handouts. The key points to watch out for this activity could be:

Making Formal Presentations

- Make sure your PowerPoint slides have bullet points that are legible and not too many per slide. Don't read out the bullets points verbatim, only for effect.
- Using images as well as pictures can quickly tell the story.
- Don't hand out the handouts first before you speak – unless there is a need to do so by the nature of the content. Tell people that there's a handout which will be available after the presentation.
- Don't forget that people like to hear stories, which put things into a context for them
- Introduce the unfamiliar through the familiar
- Decide if you want questions as you go, or at the end.
- Keep still, move your arms and hands occasionally for effect and move your eyes across the room from front to back and side to side.
- If you need to ask a question, be sure if it's a rhetorical one, where *you* will answer it, or wait for enough time for an audience member to respond.
- Your voice is your main tool – so make sure you can be heard. Practice eliminating hums and Urhs. The audience would rather hear silence!
- Don't insult the audience unless you are very, very confident in your abilities!
- A relevant insider joke is a good icebreaker – but test it on someone else first.
- Don't fear skipping slides (to move it along faster) or going back to slides shown earlier in the presentation
- Think of the presentation as a journey – it doesn't really matter if you go from abstract to concrete, big picture to specifics or vice versa, if there is a feeling of going somewhere and arriving at the right place. Small, interesting digressions can be accommodated if the journey and destination are clear.
- Don't be subservient, and don't be arrogant – and don't apologise for your lack of anything – people don't care, and it just undermines what you are about to say.
- Be aware that time moves at a different speed when you are presenting – sometimes alarmingly fast and sometimes excruciatingly slowly.
- Remember that remaining seated for more than an hour in even very good seats is difficult.
- Generally, whenever you give people something to do things will take longer than expected.

Overall, when you are in mid-stream, never be misled by what you think could be either very encouraging or apparently adverse reactions from the audience. When you are presenting and feel nervous sometimes you will look for signs in the audience's faces to get an indication as to how it is going. These reactions might range from head nodding, smiles and eye engagement, to scowling, people looking like they are avoiding your gaze, and even like they are asleep. None of these signs can be trusted – so you should always say to yourself – 'aim for the middle ground' where most people seem reasonably engaged.

However, if you feel that what you are saying is not going down as you would expect, and there is need to change the tone, or re-engage, then simply stop at the end of the current slide and say 'Ok let's take a breather at this point – maybe you would like to discuss that with your neighbour.' Or ask a question from the room. If it's really going down badly, and there are rumbles of discontent then you have two options; carry on and get out quick, or stop, state the obvious, and say that you are there to address their needs and would welcome a comment.

If the problems come from one individual (like in school days, it's often the people who sit at the back!) then you can deploy a teacher's trick. Simply direct a question or scenario to that area. Ask the 'ringleader' for his or her name, and then ask them to explain their case to the whole group. People don't like being singled out and made to speak in front of others, so the 'threat' of that will keep troublemakers or hecklers at bay. If not, they have committed to a viewpoint in front of the rest of the group, and so will feel obliged to defend it, and thus positively participate in the group.

People like conclusive endings – so don't suddenly just stop. Write your ending out word for word and practice it. Make it obvious that the ending or summary is coming and use the law of 'rising threes' (so overused by politicians) for example:

'And finally, before I hand over to Claire, I'll conclude by saying, (pause and look up for effect) that as in the words made famous by Winston Churchill some ninety years ago, all we can promise you is blood, sweat and toil, (emphasise the three) but in the end, that will, for us and our future colleagues, ensure health, wealth and security! (wait for effect) – then add a final funny line *and longer breaktimes! Thank you, good luck and enjoy the rest of the seminar!*

You should get at least a polite clap if not a standing ovation for the clever use of three sets of threes!

In terms of the feedback session, if the group is large (20 plus) then there are more logistical issues eg the need for more space and rooms if you want to break up into smaller groups as well more time required to process the feedback. One advantage is that the larger numbers mean that some sort of voting system can be used whereby the issues are teased out, summed into pithy statements and then voted on.

Top Tip

Use a camera and take a photo of the flip charts for future reference – It saves time and avoids disputes as to who said what later.

A quick and easy method is to hand out 'post-its' notes and felt pens and ask that the issues are summarised into pithy statements that people can put on their posts-its, you then stick them on a flipchart or whiteboard. These are grouped into topics and an overarching title given to that issue, which is then written on the board.

People are given sticky dots and then they stick their dots onto the various grouped issues. The key is how the content issues are turned into questions that can be voted on by the group. Then the process is as per proportional representation in parliament with the lowest scoring dropping out, and the process being repeated. If it's relevant the sub-groups can have different colours to differentiate the voting patterns.

The important aspect is to utilise the attendees' own words and phrases and not over-interpret the findings as you go. It should be a process that leads to their solution which they own. *(Note there is a complete facilitation process available suitable for all size of groups called Pinboard – for more details go to www.pinpoint- facilitation.com)*

Running effective meetings

Meetings are the necessary evils of business life and running them should be your 'bread and butter'. They can range from the informal to the very formal and can include elements of all the abovementioned public occasions. The traditional roles are well known, eg Chairperson, Secretary, so there is no point in going over the formal aspects that for an experienced businessperson are easy enough to plan for and manage, however the salient informal points are:

Managing meetings

- Whoever controls the agenda can control the meeting – so make sure you have access to the right people when creating the agenda
- Make sure that the important points are near the top of the agenda to allow for enough time. Topics at the top get more time, and people are fresh so will think more about them. It's easy for vested interests to 'filibuster' a topic by making sure it's near the end, and then talking so much on issues concerning the first items on the agenda that time runs out before the important topic comes up.
- The agenda and the timings should be checked before the content of the meeting gets underway, in case there is a need to re-prioritise. If there is an hour allowed, make sure that the time limit is recognised by all.
- The chairperson should allow time for everyone to have a say on an issue and go round the room frequently. They should not always start at the same side of the room but mix it up.
- Make your interventions brief, sharp and interesting. eg Write down three key words and phrases on your pad, say that you want to mention these topics and then in your short summary draw the threads together.
- Whoever does take the minutes should allocate agreed actions to people and have a time limit on when those actions should occur by.

Informal gatherings

At some point, a situation arises where there will be a need to address a group, either formally or informally, with no time to think or prepare. Some people are very good at speaking, and others aren't and prefer a lot of preparation. Surprisingly having no time to worry about it means that it can work very well, as people know that it's all improvised. The worst situation is where you are called on, say to make a vote of thanks, and you haven't been listening to the speaker! If there is a danger that you must make a vote of thanks – then pay heed!

Whilst speaking impromptu without notes is a skill that develops over time, there are a few pointers that can help:

Impromptu Speeches

- Don't wait for a natural gap in proceedings to speak but bang the table or a tin to gain attention.
- Make sure everyone is settled down and quiet before you start – don't worry about there being a bit of silence before you begin.
- You can start off by saying something like 'Ok, now that I have your attention, I can tell you that, or 'You probably are aware that…'
- If you use the rule of three – three aspects, three items etc then you won't go far wrong with a structure. If you say that there are three things that you want to tell them, then make sure there is, otherwise people will leave thinking 'So what was the third thing she was going to say?'
- Remember to keep it short that if people are standing
- Make good use of eye contact as you speak, slowly sweeping across the group
- Make it come alive by acting out a little scenario or telling a short story to lead up to and then illustrate the main point
- When you are done, thank them for their attention or efforts or whatever the occasion demands, and finish with a symbol or some public acknowledgment of the event or issue, eg a vote, a clap, or a toast. 'So, on that note I would like to conclude by asking you to join me in wishing Jean well for the future. (now turning to Jean) Jean, thanks for your efforts, we wish you all the best... and don't worry we don't want the sweater back!'

Summary

As a business professional, you have to be able to move easily from the formal to informal and understand when that change is required. If you can conduct formal and informal events professionally it will make your projects go well, enhance your standing with clients, and of course assist you in your general career progression. As you develop these skills, you will be asked to present or deliver speeches at various corporate functions and trade events. These are good at getting your name across to a wider audience as well as sharpening your skills in a range of settings.

To some people presentations are part of performance art, and it is true that you can perfect your skill as you would a magician or actor would. Some people seem to just have been born with the knack!

There is an old Second World War army joke which goes…. ' General Sir Randolph Lancelot DeVilliers was giving a pep talk to his troops, before they embark on a major offensive. Standing proudly in front of them, with his medals glinting, his silver moustache quivering in the breeze, he bellowed out in his pukka blue blood tones, 'And of course we will be laanding at 15,00 ho-ahs on the beach he-ah,' – at which point his adjutant sitting to the side of him says in a loud whisper, 'Sah, that should be 13,00 ho-ahs actually' Unperturbed, the General responded, 'Of course. Thank you Pettigrew-Smithe', and then blithely moves on pointing at the map, pronouncing, '… and you will be supplied by the marines et this pint he-ah'. Pettigrew-Smithe coughs and again politely pipes up, 'Sah, it's the commandos, that will pick 'em up from over they uh'. The general responds, 'Quite, Pettigrew-Smithe, as I said, by the commandos at the point, they-ah, and then, after you have taken the objective, you will be picked up at 19.00 how-ahs by the RAF, over hee-ah' Pettigrew-Smithe again pips up, 'Sah, its 20.00 hours by the SAS over they uh'. The General says, 'Thank you Smithe, thank you. So, men', he carries on, 'I am sure you know what to do, I have complete confidence in the planning of this mission, and I look forward to hearing about its success. Any questions? No, that's good, dismissed!'

Pettigrew-Smithe stands up, shouts 'Attention!' and all the men stand up, salute and walk out to their battle stations. As they do, Corporal Jones turns to Private Caruthers and says, 'You know, you can say what you like about the old bugger, but he certainly knows what he's talking about!

There is a natural limit to this though, as most businesspeople can see through a very polished presentation that does not have much content or purpose and whilst they may outwardly enjoy the show, privately they will acknowledge that it is obvious it's a show for its own sake.

Time Management

When engaged on projects, effective time management is key to your success. One aspect of this is to be clear what time you control when you are managing the project. You may have only partial control over your time during the project – and it becomes more difficult if you are involved in or managing more than one project, or another client demands more of your time. All clients seem to think that even though they realise you are not a full-time employee that you are still working for them all the time. Your time management is not their concern, as they are driven by the needs of their organisation and expect 100% attention. You counter this attitude by preparing and agreeing in advance a time involvement plan and agreeing what days you're on-site, and when off etc, and confirm this at the end of each week, for the following week. You have to be flexible, of course, as well as contactable if things need to be changed or require your attention – ultimately you both have a vested interest in the success of the project.

The basics principles of time management are:

Time Management

- Take ownership of what you can control and don't worry about what you can't
- Break large tasks down into manageable chunks
- Get the big things in first and let the small things settle around them
- Delegate tasks that don't need your specific expertise
- Organise appropriate tasks around your physical energy and intelligence and emotional peaks and troughs
- Organise and diarise your day, week and month and year
- Operate a checklist of actions – with a 'to do, started, and completed' process

The project manager manages all the resources under his or her command, and that includes people (and their time) which is the hardest aspect to manage as the 'units' are not symmetrical, and they can all do different things in different time spans. However, the only way you can manage a project is to try and get a handle on how long tasks take, and why. If you are a domain expert, then you will have a good idea of the time requirements. If you are not an expert you must rely on others, so a simple method is to do as you would at home when managing a kitchen project – get two companies to give you a quote! For critical tasks, don't rely on one person's judgement unless you really are prepared to stake your career on that person. Obviously, this is most important for tasks on the 'critical path' – that is the tasks that form the 'backbone' of the project and the timing of which are not alterable to achieve the desired outcome.

Top Tip

As a project manager planning the project one question you should always ask expert suppliers engaged in the project is how much contingency you should allow for any given task. If you don't ask, add 20% at least to test the budget/timing.

Anything that involves the staff in the decision making or consulting process takes time as timetables have to be agreed, training arranged etc. so be aware that the benefits are balanced by the time-consuming elements.

Where the work is done matters too – both to you as well as the client. When you work at the clients premises you are obviously visible, therefore there is no question that you have not spent that day working on their behalf, but efficient time management might be best served by spending more time at your office, than in the clients'.

3) The Project Report

It's usual that at some point in the consultancy exercise there is the need to produce a written report, whether initial, interim or final. Indeed, the whole rationale for the assignment might be to produce a report with recommendations on a solution or way forward. Writing and producing the report, whatever its status or nature, is therefore key to a consultant's skill set. You do not have to be brilliant – presuming your technical skills are up to scratch, clients will not expect Shakespeare, and indeed over flowery or abstruse language will defeat the purpose. If the facts are correct, the argument is coherent and clearly laid out then you will succeed in getting your point across.

If there are spelling errors and poor grammar, incoherent or illogical structures in your report then you will be doing yourself a disservice. Until you do achieve a high level of language skills you should ensure that someone who you trust has excellent spelling and grammar should review your output.

The other related aspect is the final editing and checking of the report. Anyone's writing can be improved by being subject to a critical review. This is the proof-reading process and an editor's job is to 'proofread the copy' and to eliminate small errors that inevitably occur in even the most experienced author's manuscript. They are not checking for technical aspects but checking for spelling, grammar, unclear meanings, inconsistencies and cross-referencing pages etc. It is a demanding job that requires a lot of skill and patience, but a manuscript can be hugely improved by the attention of an experienced proofreader. Also, you should make sure that any facts or details are checked by a technical expert

The following is a typical process of report creation. Obviously, the words have to be written – originated somewhere, possibly compiled from field research, notes, the internet, client documents etc, and you have produced a draft of the whole document – something to work with and get feedback from.

Report Types

- **Interim** – You may be asked to produce an interim report if the project has a 'longitudinal bias' (that means it spans a long period of time with various stages) and there are some things which are interesting or should be known before the end of the project and preparation of the final report.

- **Initial** – This could be a simple post contract piece that clarifies what you will do, how you will do it and how much it will cost, or it could be a report that is closer to a first draft of the final report to gain feedback before, say, the final publication for external consumption. It is useful as a tool to issue an initial report if there is delicate dimension to the work, and to prepare the ground for any contentious issues. Also, there is less expectation of an initial report than in the final fully fledged publication in terms of presentation and structure.

- **Final** – The final report is often the focal point and summation of the consultancy exercise and is seen as an emblem of the outcome of the project and the consultancy that created and delivered it. The quality of writing and production should be as high as possible given the time and budget constraints that the project operates under. It's possible that there would have been several drafts and re-writes before the report is eventually signed off. The format and most of the contents could have been agreed or acknowledged during the project, but sometimes the findings are only revealed when the report lands on the desk of the client, to be discussed by the board.

Top Tip

A good report structure is key. Once you have an agreed structure for the report, writing it becomes a lot easier, and allows for different inputs from different people to slot together.

The general issues of the report writing centre round time and the correct estimation of client expectations. What you don't want to do is have to originate an entire 5,000-word report overnight, and expect to get a complete word-perfect document, ready to wow the clients.

What you should aim for is a process that results in a good quality, solid, well-structured report that presents the information and assesses arguments for and against, and then clearly presents the conclusions and any recommendations, if you were asked for that.

You should, during the project planning and contract stage, have discussed the place of reports in the context of the overall project. First, there is the issue of how much time and budget you should allocate to the report. It's easy to accept the task at the beginning of projects and forget that there should be sufficient time allocated for the report, especially if it's critical to the whole exercise!

It is easy to forget that as the project continues and timescales slip, that the report writing phase was allocated a generous 20 days to produce the report as a separate head, but that becomes used up and there is now no time/budget left for it, but still an expectation that you will do it. In a way, the most important thing – that on which you might get measured – is impacted by the fact that it comes at the end of the process.

The fact is that writing takes time, and producing quality writing takes a bit longer than you think. A seasoned journalist can rattle out a couple of pages of A4 in no time, as they are trained to do this, and they do it every day. They also have deadlines to meet and a sub-editor sitting at the news desk ready to hone the copy.

So, there is the speed issue – and you may not be a brilliant typist, but your skills in finding information, processing it, and producing copy rapidly can develop over time with practice.

The other issue affecting your performance and ability to get the job done is the appropriateness of the document (both quality and quantity) to the role it is to fulfil. There is no point in sweating overnight producing a 100-page document for a committee meeting that has to be read, processed and then acted on by members in an hour and a half, if they have never seen the information before. Is it not better to produce four or five pages very quickly, circulate before the meeting so that they will have time to prepare their thoughts? Also, in terms of production values is there really a requirement for final DTP quality output when the document is for discussion only?

So, your first question should be – what is the very minimum that is required for this task and what exact role does this document fulfil at this time? Then focus on the quality of the ideas, or the arguments, rather than the quantity.

Note that there is a deviation from this rule concerning the final report, when some clients do feel that the quality and value of the work they have received is measured by the volume as well as the information contained. This is a defence mechanism, as if they are challenged by a senior manager on the consultant's expenses they have incurred, they can say, 'Well you should see the report they produced - do you want to read it? The challenger glances down at the 2" thick tome on the desk and quickly says, 'Er, no thanks, but I am sure you got good value.'

There is usually ample information and data by which to flesh out a final report – and the issue is what to leave out rather than what to put in. Some clients are more swayed by looks and the quality of finish than others, so by the time of report production you will have got a feel for their needs and their requirements for size or glossiness. If design is not your thing make sure you have a designer with DTP skills on hand to start to design the pages as you produce them, and not present him or her with 100 pages for overnight production. Some clients will not bother reading the report and simply ask for a verbal summary, take your hard work, flick through it, scan the executive summary and put it into the filing cabinet.

There are some general rules in producing reports which are highlighted overleaf:

Report Writing

- A good structure or plan will help greatly in arriving at a good final product
- Collect information, summarise it and process it 'as you go' rather than at the end
- Don't use too much flowery jargon - use plain English
- If you are well known to all readers then the first person will suffice, but otherwise use the more formal third person in the narrative unless there are reasons not to.
- Keep footnotes or explanations to a minimum.
- Don't use slang or colloquialisms – it detracts from the formality
- Divide your writing sessions into planning and organising the material and writing it. Divide big writing tasks into smaller chapters and put a timescale on each one
- Focus in on the two or three pages that are key – namely the assessment of the information and the recommendations and the sections that affect individuals – particularly the client!
- Create templates to give you a start and try not to start from a fresh page but adapt to an existing document.
- The beginnings of reports are read more closely than the rest, so make sure your executive summary is good.
- Although the standard format is A4 portrait (ie upright) some reports may be better printed in landscape if there are charts or diagram that are wide.
- Be clear when specifying the report if the client wants a menu approach (that means a range of options to be presented) or an absolute recommendation.
- Put the most important information on the right-hand pages, near the top. The left-hand pages could be of lesser importance, or for graphics, charts etc. Study how newspapers, journals and magazines lay out their text for clues.
- Keep design values consistent, ie one font, and two or three levels of headings. You only need a simple template to make a very professional output.
- Utilise Word's facility to produce a Table of Contents (ToC) which updates itself if you make changes to the content.
- Put all the supporting evidence and boring but essential data in the Appendices
- Don't forget your report could contain confidential information.
  if so, make it plain on the cover, or put a circulation list on it.
- If the findings of the report are critical of individuals and mentions them by name, you should get explicit clearance from the client as to how this is handled in your report.

Format of the report

Reports tend to have a standard format, which helps greatly when you are putting it all together. Most managers will expect to see a structure that:

- helps them understand the issues
- weighs up the arguments
- cogently presents the findings and
- concludes and makes recommendations

How you do it and the exact layout is not that important, though usually you would move from the background to the foreground, from the general to the specific, and from the abstract to the concrete – in others words describe the problem or the situation and what is the background to it and any external factors influencing it, and then move through the woods to the trees, and provide the exact details as to the way forward.

Be aware that most readers will flick through the report and zoom in on what matters to them (were they mentioned in a favourable light?) and then to the main findings. The key parts for them will be the executive summary at the beginning, and perhaps a conclusion or set of recommendations at the end. The rest they will skim read.

Top Tip

Be clear whether the report should be sent by post or email. If email is sufficient, then create a pdf of the Word file, so that it can't easily be altered on the clients premises (protects you from any copying) You can download a free pdf creator from the web (ie www.primopdf.com) Hard copy is better for the final report which should be printed on quality paper (100 gsm) be wire bound and have your logo and contact details on it.

The typical format of the formal summative style report is as follows (though there are variations)

Cover

- Title of report
- Date and Version number – ie Draft or Final
- Company details
- Consultancy

Inside cover

- Repeat of above plus Author and company
- Copyright notice or circulation restriction statement (ie for internal use only)

Contents Page

1 Executive summary

A key component, where you list, or bullet point a succinct summary of the report with each section condensed to a sentence or two. It's a difficult skill to acquire, to be able to summarise to the right level, and know how much to include, as it's the section that will be of most interest by casual readers and non-experts so must be able to stand alone from the main body of the report. Obviously, it will be prepared last, and might cross-reference the sections where the supporting information can be found.

2 Introduction

The introduction should set the scene for the reader and clarify any assumptions. For example, if the report includes technical language then say where the acronyms are explained (ie the glossary). If there is a small amount of background required then this can be explained in the introduction, if there is a lot then create a separate section.

3 Terms of reference

The terms of reference are the grounds on which you have been commissioned and any limiting factors. It can overlap with the next part – the scope but is more about the background of the commission than the actual work.

4 Scope

An expansion of the terms of reference. The scope of the report is simply what it covers, and what it does not, if that is important to state. For the scope – use who, why, what, where, when etc to refine the 'playing field'

5 Background

See above – this section is fairly self-explanatory. It is perhaps a summary of what has gone before and the circumstances leading up to and impacting on the project, if relevant. This section can be prepared in advance. It will probably be skipped through by clients as they know most of it already, but it does show that you are aware of the background issues relating to the organisation and the project and have not been acting in isolation.
(You may have a succeeding section which analyses the specifics issues which impact on the project – called Specific Issues or similar.)

6 The Project Approach/Methodology

Having covered the background, you are now moving on to the specifics – the details of the actual intervention. This section would encompass the 'how's', and to a lesser extent the 'where's and what's' of the project. Ideally in this section you need to address any questions that might arise later from those that could challenge your findings based on any empirical evidence. In other words, on the methods used, or how the information was gained. You may want to simply describe the methodology in this section and include any details (eg the actual questionnaire or the verbatim reports) in the appendix, to streamline the main body of the report.

7 The Project Subject - Personnel

This and the next section might contain information on whom and what was interviewed and/or analysed. If the subject of the report has a human dimension (ie that the information is mainly arising from interviews, then this would be segmented out. If the people dimension is there as a means of eliciting information about technology or processes, then this section would contain information about who was interviewed and their role in the processes.

8 The Project Subject - Systems/Technology/Products/Processes

If the subject of the report concerns products or processes then this section would describe them, and then, depending on the approach you want to use to illuminate the findings, and highlight issues. Alternatively, you may simply use this as a totally neutral, descriptive chapter and include any analysis in the next sections.

9 Main Findings

Having described the people and the processes that relate to the subject of the exercise, you arrive at the main body of the report. Here you will lay out your findings, namely the information collected which has been sifted and appraised by your critical and technical expertise. Note that in this section you are looking at the processes or people in isolation and this is different from drawing a conclusion or making recommendations, as you may want to mitigate any recommended further action by considering a more rounded analysis of the business context, eg considering opportunity costs or general economic risks.

10 Financial Appraisal

There may be a need to segment out a financial appraisal from the main findings if they are not already financial in nature. Although it's true that not all business can be reduced to pure numbers, it can be useful particularly to the accountants and number crunchers in the client company, to see that the findings are based on a rigorous analysis of the situation. For example, the costs of a process matched against tasks, versus the benefits or outputs.

11 Summary or conclusion

The summary or conclusion will draw together the various threads of the findings to arrive at a synthesis of one or many scenarios or propositions. Again, at this stage you should be careful with your language that you do not appear to be promoting one or other of the conclusions or statements - that is for the next section. The merits and demerits of each of these should be evenly weighed up and teased out, along with the impacts on knock on effects on other related services.

12 Recommendations

If you have been asked for recommendations then in this section you have to clearly lay out what exactly you think should be the way forward based on the evidence you have accumulated, analysed and summarised in the previous sections of the report. There should be clear linkages from this section to evidence previously discussed so that a recommendation does not appear to have simply come out of the blue. You have to be able to argue for the reasons and the basis on which you have made these recommendations, but you can rank or qualify them based on what you see as relevant market information and the context that the business finds itself in.

13 Appendices

The appendices can contain any supporting information that is relevant to the project or the report, which might be either too extensive to include in the main body or interest only a minority of people.

Top Tip

A fallback scenario for imparting bad news is to use the 'good news and bad news' technique. Make sure the arguments hold water as you may be challenged by those affected.

Summary

This section has covered the main tenet of the consultancy profession, namely the analysis of a situation and then devising and presenting a solution based on your understanding of the business requirements of the client, and all the relevant information.

There are wider ethical issues which are not addressed in this section, concerning the promotion of products and services that you may be closely identified with and indeed may form the perfect solution to the client's problem, but might be regarded as being 'too close to home'. Some of these issues are addressed in the next section.

There are other types and formats of reports, eg concept papers, evaluations, investigations, but to some extent they are variations on a theme and are covered by the above, in terms of form, or approach.

Ultimately you will succeed or fail by meeting client's needs and understanding their issues and problems and providing appropriate real-world solutions. In conclusion the main ideas contained in the section are to:

Summary

1. **Remember the human dimension to projects** - in managing or participating in projects remember that they are human endeavours, and all projects start off well intentioned, and almost all struggle at some time.

2. **Consider your own reputation** - what you might have to do if there is an absolute failure, whether during or after the project; have you covered your own position with the correct documents – the specification, sign offs and change control mechanisms? What happens if your recommendations are taken up and there is problem with whatever you have recommended – are you covered legally?

3. **Realise that most clients are looking for good sound ideas** – to either make them money or save them money and make them look good to their counterparts. You will no doubt be an enthusiast for business and have endless good ideas - the question is operationalising them, making them work on the ground. Without an air of reality and the issues that the client is facing on a day-to-day basis then you will be dismissed as an 'ivory tower' consultant.

4. **Make efficient use of your time and experience** - invariably there is a lot of work to do to wrap up the project and the report often gets squeezed so don't create everything from scratch, but try to reuse ideas, content, documents etc.

5. **Adopt a structured approach to your business** – you must maintain decent records, in files and folders, keep information in a well organised library and your task of assembling and presenting the report is made much easier

6. **Have confidence in your process skills** - there's what you do and how you do it. What you do should look good, and sound good, but ultimately must work in the rough and tumble world of business today.

Checklist

Before commencement

- ❑ All pre-project work is completed
- ❑ Negotiations completed
- ❑ Associates agreements in place
- ❑ Client legal contracts or agreements in place
- ❑ Client's expectations managed
- ❑ Budget established – overruns discussed
- ❑ Objectives and success criteria established – tangibles and intangibles
- ❑ Measurement tools agreed or established
- ❑ Project plan developed and agreed
- ❑ Appropriate tools for the job available
- ❑ Phase of Project lifecycle noted
- ❑ Any associated issues identified
- ❑ Appropriate approach or language embodied in process, activities or tools
- ❑ Roles and responsibilities of project personnel agreed
- ❑ Informal intra group issues considered in planned roll out
- ❑ Any inter-group issues considered in planned roll out?
- ❑ Evaluation and feedback loops agreed/completed
- ❑ Sign off points agreed
- ❑ Change control procedure agreed
- ❑ Main stakeholders have signed off plan

After commencement

- ❑ Strategy and process for information collecting consulting agreed
- ❑ Use of appropriate questions for the stage of project
- ❑ Appropriate approach for phase of project - factual and analytical at start to synthesis at presentation
- ❑ Key personnel allocated roles for the tasks
- ❑ Arrangements in place for individual or group information gathering
- ❑ Group presentational issues addressed
- ❑ Content for information gathering (ie questionnaire) ort presentations agreed and tested
- ❑ Environmental issues in venue or room identified and altered
- ❑ Agenda and arrangements for meetings agreed

On completion

- ❑ Agreed time allocation for project report
- ❑ Objectives and audience agreed for report
- ❑ Agreed structure and format of project report
- ❑ Production values and numbers to be produced and distribution list agreed
- ❑ Any launch or release issues addressed
- ❑ Agreed follow on plan or any post-project support issues

Activity/Assignment

This activity depends on being commissioned on a project. However, some preparatory work pre-engagement is possible.

For one of your (potential) clients describe the processes for a likely project for which you could be hired. Review the content of this section with that perspective.

Submit a case study of approximately 1000 words. In a format that could be submitted to a client as a (demonstration) report.