**Guideline: How to prepare a consulting report?**

# Report Outline:

This is an overview of elements that your consulting report MAY include. The specific outline of your report will depend on the topic/research questions on which you are working. Your outline needs to be adapted to the specific content of your report. Of course, some elements are a must for a serious consulting report. These elements are marked with an asterisk\*.

* **Cover Page\*:**

The cover page should have the title of the report, along with some extra information that will help people who may want to file it for later use. For example, provide the names of the team members, display the company logo and the logo of your university, and list the date of the final submission of the report.

* **Disclaimer Page\*:**

A disclaimer is a statement that the company or organization hopes will limit its liability for the product or service it provides (as your instructors, we certainly do not want to be held responsible for any bad advice or research you provide your clients). The disclaimer statement is fairly typical in consulting projects, and if nothing else, reflects the seriousness of writing at a professional level. There is often a great deal at stake, so make sure your writing and research processes mirror this seriousness.

You can cut and past the following disclaimer statement for your report:

**DISCLAIMER**

This material is based upon work supported by *enter name of your university*. Any opinions, findings, conclusions, or recommendations are those of the authors and do not reflect the views of *enter name of your university*, its employees, or its administration.

* **Title Page\*:**

The title page of a formal report works in collaboration with the cover page. The title page should include specific information regarding the report such as:

* Names of the authors or other contributors, including contact information and the name of
your university
* A specific title that reflects, as much as possible, the main points of the report
* The name of the business or organization your team is consulting
* Logos of the company you are consulting with and of your university
* **Table of Contents\*:**

A table of contents serves three purposes. Obviously, it helps readers who do not want to read the whole report but want to easily locate particular parts of it. In addition, it assists readers who want an overview of the report’s scope and contents before they begin reading it in its entirety. Also, the table of contents serves as a tool for writers of the report by outlining specific aspects that need to be addressed.

Create the table of contents by outlining section titles and headings. Make sure the table of contents reflects the organization of the report and enables your readers to easily locate specific pieces of information.

* **Executive Summary\*:**

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

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

* **Introduction to the Report\*:**

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

* + - * **What is the problem/opportunity?** Be specific and if possible and appropriate, quantify. Describe the problem/opportunity in monetary terms, because the proposal itself will include a budget of some sort and you want to convince your readers that spending money on what you propose is smart. Be positive and motivating.
			* **What is the purpose of the report?** Even though it may seem obvious to you, the purpose of the report is to describe a problem or opportunity and propose a course of action. Be specific in explaining what you want to do (and make sure that you actually do this!).
			* **What is the background of the problem or the opportunity?** In answering this question, you probably will not be telling your readers anything they don’t already know. Your goal here is to show them that you understand the problem or opportunity, as well as the relationships or events that will affect the problem and its solution.
			* **What are your sources of information?** Review the relevant literature, including internal reports, memos, external public articles, or even books, so that your readers will understand the context of your work. Clients are looking to you for sound advice. If your research is sloppy, incomplete, and rather nominal (for example, you checked out a few websites that the client could do on his or her own free time), your report will be less convincing, and your ethos as a provider of sound advice will be suspect. The best reports always contain complete and thorough research (and a complete list of references); moreover, complete and thorough research cannot be completed in the waning moments of the semester.
			* **What is the scope of your report? I**ndicate what you are proposing to do as well as what you are not proposing to do. In a report of approximately 20-25 pages (excluding references) you will not be able to discuss all issues in detail. You need to focus on the most important aspects/questions/problems. Let the reader know the limitations of your report.
			* **How is the report organised?** Indicate how the report is organised, i.e. the structure of the report. This is usually done in one to two paragraphs at the end of the introduction.
			* **What are the key terms that will be used in the proposal?** If you will use any new, specialised, or unusual terms, the introduction is an appropriate place to define them.
* **Background\*:**

The background section provides information on the context behind your research. Actually, the background section encompasses several sub-sections which require you to conduct comprehensive research. Remember your ethos as a sound provider of business advice is largely based on the research that supports your findings and ideas. Clearly organise each of the sections. Open each section with an introductory preview of the material. Even more importantly, end each section with a conclusion that summarises and explains to the client what the information is designed to demonstrate. Relate and unify all of the sections so that it reads as a coherent whole. Use good transitions between sections, and conclude with a section in which you pull together and evaluate the background. Refer to resources in the actual text itself and remember that the background section is not the place to analyse the problems or the opportunities.

The background section is an important phase in researching and coming to understand your client, the firm, and the situation and environment in which they operate. **Not all clients may want a comprehensive background section to be included in the final report. Make sure to discuss this beforehand.** Even if the background section is not included in your final report, you surely need to do extensive background research to be able to work on your tasks. The following sub-sections may be part of the background section:

* + - * **Client Profile:** The purpose of the client profile is to both “bring the client to life” and to tie the information together by explaining how it helps portray your client as a member of the business community. The client profile include some basic information on the client, such as places of residence, educational and training background, motivation to start the business, business philosophy/attitude towards business, etc.
			* **Nature & History of the Firm:** What does the firm do (production or services) and has the firm evolved?
			* **The Firm Today:** Provide information on the firm today, e.g. its current facilities, organizational structure and personnel, financial statues, as well as its immediate locale and setting.
			* **Business & Market Environment:** This section describes the business and market climate of the local community and/or region. The focus here should be on the business and economic conditions that affect the firm’s operation. For instance, a craft shop or a bed-and-breakfast would tie into the larger picture of the area’s tourism; a concrete supplier would be affected by trends in new houses and commercial building projects.

There should also be consideration of the state, national, and global prospects and trends that could affect the local and regional business climate and/or your client’s business prospects. Your client’s firm is, in varying degrees, part of these micro and macro environments. Seeing the firm in these contexts can be crucial in perceiving and understanding its problem and prospects. This is a section where thoughtful, careful, and thorough research is important. Your client will be extremely impressed with a demonstrated understanding of the local, regional, and global market conditions that impact his or her business. Again, this is not the place to analyse or discuss any of the firm’s problems or prospects.

* + - * **The Competition:** This section should profile local, regional, and perhaps even global competitors. It will also discuss likely trends in competition.
			* **The Firm’s Objectives:** This section describes the firm’s short-term and long-term objectives.
* **The Team’s Tasks\*:**

Clearly describe the tasks that the consulting team has agreed to carry out. This section should also identify any tasks the team originally agreed to perform but which, for whatever reason, was unable to complete. The team must clearly point out how a general task breaks down into component tasks. For example, “Developing a Market Plan” will involve several component tasks. The tasks may include: “Designing and Administering a Market Survey”; “Designing an Advertising Strategy”, etc. By the same token, if a team is presented with only one general task, such as “Crafting a Business Plan”, it will need to break that general assignment into component tasks. Secondly, this section is pivotal because it serves as a preview for the following section, in which you explain how you actually carried out each of the tasks.

* **Methodology\*:**

In this section narrate and explain the procedure your team followed in addressing the problem/tasks. Let the reader know which information sources/data you used, how you gathered this information/data (e.g. desk study, surveys, interviews, etc.), and how you analysed the information/data. You can either explain your methodology in a separate section or integrate information on the methodology you used in the sections related to your team’s tasks. The latter makes sense if you followed different procedures for the individual tasks.

* **Sections related to your team’s tasks (e.g. Market Entry Strategy)\*:**

This section should be organised around your team’s basic tasks stated in the section above. The section for each task should be organised in a consistent way, for example:

* Describe the current situation (in effect, the “problem and/or opportunity”) and the needs/opportunities it creates.
* Narrate and explain the procedure the team followed (your methodology) in addressing the needs created by the market situation (if you have not already done so in a separate section on methodology).
* Describe your results. What were you able to find out through your research? Based on your research findings, which model/strategy did you develop? Which potential clients/suppliers were you able to identify?
* Draw conclusions and make recommendations related to the individual tasks. Pull the evaluations together, state a solution/strategy, and justify one or more recommendations. Depending on the objective(s) of the consulting report, your solution/strategy should include major steps or phases and resources that are necessary to implement a specific recommendation and the expected outcomes.

Remember to reflect back on the research your team conducted. Your team's ideas should not appear as if they developed out of thin air. Use sentences that point your reader back to the research your team conducted.

* **Recommendations:**

Depending on your tasks, you can discuss your recommendations in the sections related to the individual tasks or in a separate recommendations section. If developing recommendations is one of your tasks, you should probably add a separate section on recommendations.

* **Summary, Conclusion\*:**

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

* **Bibliography\*:**

“Bibliography” or “Works Cited” – call this section what you want. Whatever the case, **you must list all resources that you used for this report (see below)**! Therefore, it is imperative that you keep track of all the sources that your team used in the report.

* **Appendices:**

An appendix contains material at the end of a formal report that supplements or clarifies. Depending on the nature of a consulting team’s tasks, appendices will be more or less useful to the client. Among the kinds of material which might be included in appendices would be complete statistical readouts, copies of surveys and questionnaires, reprints of helpful articles, or excerpts from book length resources, brochures, copies of letters, etc. The appendix should reflect the amount of research that the team put into the project. Be careful that you don't overdo it though. If your appendix is too voluminous, you risk the chance that your client will simply refuse to wade through it to seek out important information. **Make sure that appendix materials are also referenced in the text of the report.**

# Style Guide & Format

* **Format**

Use a font that is clearly legible. Ask the company whether it wants you to use a specific font (e.g. in line with it own corporate guidelines). All pages must be numbered consecutively. Make sure to use the same format throughout the whole report. Ideally, one person should be responsible for formatting your final report before you hand it over to the company. Before you hand in your report, make sure the following elements are consistent:

* Font and font size
* Headings
* Footnotes
* Page margins
* Visuals
* Within-text citations
* Bibliography entries
* Spelling (US or UK)
* Numbers and dates
* **Headings**

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

* **Visuals**

Used properly, visuals (e.g. charts, graphs, figures) can effectively reinforce the main points of the written text. Furthermore, effectively positioned visuals provide a strong image for your readers to remember. When using a visual, remember to direct your reader’s attention by introducing it in your text (“As one can see on chart three: Enrollment Statistics”). Note that you also need to be specific in your reference, i.e. always provide the source of the visual and add it to the bibliography. If you alter/adapt a visual, mention this when indication the source (see table below), e.g. ‘Source: (adapted from) Bartlett/Goshal (1998): 122’.

When positioning the visual on the page, locate it as closely as possible to the point in the text where it is referred. Tell your reader what you want them to see, and how you read/interpret the graph (explain the graph). Visuals should complement, not replace key information/arguments in the text of the report. Make sure your visuals are numbered continuously and have headings.

* **Bibliography**

You must list all resources you cited in the report text (see above). Do not list any sources you did not cite in your report. Make sure to use the same citation style throughout the bibliography and that your bibliography entries are complete (this also applies to online sources, e.g. websites). Bibliography entries need to be consistent and must appear in alphabetical order. You can make your life easier by using a reference management programme, e.g. Citavi, EndNote, Mendeley, Zotero (free), etc., for your bibliography and in-text citations.

* **Citing**

Traceability is key! This means that **you must cite your sources whenever you use ideas or data generated by someone else** in your text. Cite these sources even if you do not quote from them directly. When you do borrow exact wording, including key phrases, you must use quotation marks. There are different ways to cite sources in your text. Whichever citation style you use in your report, it has to be **consistent**.

**Table 1. Direct Citation vs. Indirect Citation:**

|  |  |
| --- | --- |
| Direct Citation (quotation) | Indirect Citation (paraphrase) |
| * Repeating an original statement without making any changes
 | * Reproducing an original statement using your own words
 |
| * Modifications to the original text must be indicated
 | * Keep the original meaning of the statement
 |
| * Indicate a direct quote with quotation marks
 | * Do not indicate with quotation marks
 |

Source: adapted from Decker & Werner (2016): 220.

In case you do not remember much about citing and citation styles, please take a look at the following links:

* General information about parenthetical and footnote referencing: <https://academic-research-and-writing.org/e-learning/chapter-10-referencing>
* Guide to the Harvard citation style: <https://libweb.anglia.ac.uk/referencing/harvard.htm>
* Guide to the APA citation style: <https://libweb.anglia.ac.uk/referencing/apa.htm>

**Table 2: Harvard vs. APA Style**

Source: Saunders et al. (2009): chapter 14

**Sources:**

* Decker, C. & Werner, R. (2016): Academic Research and Writing: A Concise Introduction. ICADEMICUS: Frankfurt am Main.
* Marietta College: General Outline for Business Consulting Reports. URL: http://w3.marietta.edu/~catalant/Management%20451.pdf [27.04.2018].
* Saunders, M.; Lewis, P. & Thornhill, A. (2009): Research Methods for Business Students. Fifth Edition. Pearson: Essex.
* Stroh, L. K., Johnson, H. H. (2006): The Basic Principles of Effective Consulting, Lawrence Erlbaum Associates Publishers: London.