SI 501: Final Consulting Report

[Team Assignment]
Due: Dec. 6, 2021, before Lecture

Objective

- To communicate your findings and recommendations to your client and to your instructors.
- To demonstrate the ability to write a good consulting report as practiced by consultants and professionals.

Assignment

- Write up your data, analysis, findings, and recommendations in a consulting report.

- Your primary audience is your client. Use a professional tone without jargon. (For most clients, that will be different from academic writing, narrative writing, personal writing, etc.)

- Aim for 4000 or more words, counting everything but references and appendices. (However, after 4000 words, longer is not necessarily better.)

- We recommend the following format and content:
    - **Title page,** including team member names and group email address and the name and contact information of the client(s) to whom you are submitting the report (separate page)
    - **Table of contents** (separate page -- try to keep to one page or less)
    - **Executive Summary** -- a summary of the entire report, with the key points pulled out. It should fit on ***one page***. It's usually best to write this at the end, after you've written the rest of the report. You can reuse excerpts from the rest of the report. Work to make this page clear, concise, and pithy. Some of your readers may only read this page and nothing else, so make it count.
    - **Body**
        - **Introduction / background information** about your client and the focus of your project so that your recommendations make sense to your readers. You don't need to belabor obvious information that the client already knows, but you will want to reiterate information about the client that is critical to the project to demonstrate your own knowledge of their situation. (This is common practice in professional consulting.)
        - **Methodological overview** of your data collection and analysis methods, including an anonymized description of your interview participants ("we interviewed two librarians, two managers, and two library users."). ***Note: Be specific where you can, but use a sufficiently high level description that no interviewee's identity is revealed. In some cases, this may be as abstract as "five employees of the company."*** Avoid or define jargon. For example, most clients will not know what "contextual inquiry" is, or what

an "affinity wall" is. If you use such phrases, make sure to describe them the first time, so that an intelligent layperson can understand.

- **Findings.** Provide a well-structured, well-organized explanation of your findings. Think hard about what order you want to present these.
  - **One way to think about the organization of your findings is as a written version of your affinity wall.** Some of the higher-level notes could correspond to sections; the mid-level notes under them would be paragraphs in the corresponding section; and the raw affinity notes are evidence you would use to back up each paragraph. This doesn't have to be a strict one-to-one correspondence, but it's useful as a rough guide.
    - Consider ideas from the "pyramid principle" reading as far as how to structure this section. There is close alignment between their advice and your affinity wall structure.
  - What the affinity wall doesn't necessarily give you is a natural ordering within each section or paragraph. So, think through a sensible narrative at each level.
  - Ultimately, you want to highlight the findings that are most relevant for the client project. Not everything in your affinity wall needs to be in the final report, and among those things that are, you might cover more important topics in greater depth than others.
  - **Be sure to provide concrete evidence** for the problems you are highlighting -- interviewee quotations, photos, drawings, information from background research, etc. Since semi-structured interviews were your main method of gathering data, be sure to include plenty of quotations from your interviews! Strive to include *at least three pieces of supporting evidence* for each finding -- for the major findings, you will want as much evidence as possible. Let the data tell the story: "I forgot to click the 'Save' button, so the next day when I came back to work, I discovered that I had lost three hours of effort from the previous day! I was in tears," adds a visceral element to the finding, "The UI makes it too easy to lose data." Relevant raw data can be very convincing!
  - Read the bullet above again!
  - Not every finding needs to take up the same amount of space. Key findings might each get their own section, while minor miscellaneous findings could all be condensed into a single section, for example.
  - **Highlight positive findings as much as problems.** Either begin with positives, or interleave them into your structure. You don't want your client to feel they are doing everything wrong!
- **Recommendations.** Provide recommendations that address key findings that are problems.
  - Provide recommendations only to the extent that you are comfortable and confident providing as a team. If the client has a problem with X, and one of you happens to be an expert at X, feel

free to provide a detailed solution; if not, it's OK to say, "We recommend a professional consultant who knows how to handle X" or something relatively abstracted like that.

- For each recommendation, provide a high-level summary of the recommendation.
- Provide details only where they are not readily available elsewhere.
- If the recommendation is not a new one, feel free to refer clients to additional consultants (often required for complex technical solutions); literature on existing solutions (try to find the most credible sources); other resources you are aware of.
- You can choose to offer your recommendations one by one after each finding, if that organization seems to work better. (I.e., you might merge your "Findings" and "Recommendations" section into a single "Findings and Recommendations" section that alternates between the two.)

▪ **Conclusion.** Provide a short conclusion that emphasizes your main points. (half a page or less)

▪ **References.** Cite and include bibliographic information for anything you refer to that isn't coming from client interviews. (For information from interviews, make sure it's otherwise indicated how you obtained the information.) Information you heard from your client contact or in interviews does not need to be cited formally, but it should be clear in the text how you arrived at that information.

o **Appendices** (optional) - Put information in the appendix if it isn't essential to make your points, but which might provide some context, and which some careful readers might want to know more about. For example, since SI 501 isn't focused on competitor analysis, you probably wouldn't include a detailed competitor analysis in the body of your report. But, if you did a competitor analysis as part of your background research, and something about it is important for your findings/recommendations, you may want to include an edited version of your competitor analysis as an appendix. On the other hand, if nothing about the competitor analysis has any bearing on your findings or recommendations, don't include it. Similarly, if you have a detailed, multi-page description of a recommendation, you may want to put it in an appendix, and provide only a summary in the main body.

- You may reuse your own text (e.g., from your background research reports), bibliography, visuals (e.g., photos, sketches you created in your interpretation sessions and "cleaned up" for this report). You must cite other people's work, but you do not need to cite your own background research reports (and here, you *can* just cut-and-paste without quotations, as you can whenever it is from your own unpublished work). Of course, you should do much more than cut-and-paste: Write meaningful transitions; re-organize to fit the final narrative; develop coherent arguments; etc.

- Tips

  - Proofreading and good English are an important element of professionalism. If your team includes members with different degrees of English ability, the stronger English writers may need to edit and proofread the final report. That may also mean that the *other* team members need to contribute more in other ways. Discuss this as a team up front.
  - If you've never written a consulting report, Sweetland Writing Center can be a big help. Make an appointment early because their schedule will be busy later in the term!
  - If you feel that a dramatically different format than the one described above makes more sense for your project, please discuss first with your GSI.
  - Include visuals -- photos, diagrams, tables -- if they convey or illustrate a point better than prose text. Be sure to include captions for all visuals. A good caption allows someone to understand the content/context of the visual even without having to read the relevant text in the body.
  - Use good formatting (fonts, section headers, captions, bulleted/numbered lists, etc.) to improve the readability and "skimmability" of your report. This is not a short story or literary essay.
  - Set up an appointment with your instructor or GSI to review your draft, if you like. Send your draft in advance, and come to the meeting with specific questions! This is encouraged.
  - Your goal is to impress your client with an insightful report!

To Submit

- Submit the report in a single document (.pdf, .doc or .docx format) to Canvas, before Lecture on Dec. 6. No Google Docs or other file formats that can continue to be edited after the deadline.

- Email the report, and the team's thanks, to the client, cc'ing the GSI. If you forget to CC your GSI, forward the email that you sent to your client to your GSI.

Rubric

Your GSI will solicit your client's review of your project, and your grade will be recorded when your client has acknowledged receipt of your report and provided his or her review. When we score your work, we will be looking for:

- **All elements** as discussed above.
- **Language that can be easily understood** by your client or by anyone who is not familiar with contextual inquiry. Any class "jargon" is either avoided or defined for the client. It's clear that you are writing for a professional audience.
- **Excellent grammar, mechanics, spelling, and sentence construction.** Students for whom English is not their first language should take advantage of Sweetland Writing Center to maximize communication with the client. Native English speakers on the team will want to proofread throughout.
- The core of the report focuses on a **detailed discussion of your findings and recommendations**. Use the data and evidence you collected to construct a cogent,

compelling argument. Your recommendations should connect to your findings, and your findings should be backed up with strong evidence!

- Distinguish between different kinds of **recommendations**: ideal/feasible; long-term/short-term; expensive/inexpensive; high-impact/low-impact; etc.
- An **organizational structure and report design** that is consistent with a formal report for a professional client. Section headers, bulleted/numbered lists, and other text features make it easy for the reader to navigate the document and find information within the report.
- A **professional, clear writing voice** (e.g., not personal or scholarly). While various teammates may have been primary author for particular sections of the report, the final product has a unified voice. It should *sound like* it was written by a single person.
- **Figures, models, and/or photos,** if included, illustrate the points made in the text and have **descriptive captions** to anchor them in the report. If you include models, they are no longer rough sketches -- they are professionally rendered.
- **Appendices** (optional) follow the guidelines above; any attached protocols, procedural advice, or articles are annotated in a professional manner with professional-caliber appearance.
- **4000 or more words**, for the body of the report, excluding references and appendices.
- You **cc'ed the GSI when you emailed the final report to the client** by the assignment due date.

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