

# 8 Consulting/Management Report and Recommendation Report

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**This chapter covers the types of reports for the following purposes:**

1. As a report directed to the senior management personnel of an outside organisation, as a result of work you have carried out for the organisation.
  2. As an internal assignment for a university course of study. In this case, your assessor will probably need it to be written as though it is for an outside organisation. Check that this is so.
  3. Checklists
- See also **A Project Team's Progress Reports**, Chapter 7: *Progress Reports*, page 111.
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## A Consulting or Management Report

### *Purpose*

To inform senior management personnel of the results of consulting work you have carried out for them.

**IMPORTANT: This report should be written so that someone with no technological or scientific knowledge can understand the overview, meaning and implications of it.**

*A management report is likely to be read by non-experts*

When writing this report, imagine that the academic staff member who will assess it is a senior manager in a commercial organisation. The staff member will, of course, read the whole report and has the background to understand the science or technology behind it. But, in imagining this organisation where your report is going, the following points need to be remembered:

1. **Senior management may not read a whole report. They rely heavily on the *Executive Summary, Conclusions and Recommendations* to give them an overview of the substance of the report. A longer report may also need section summaries.** They will expect to understand the following from these:
  - What your work means
  - How it will benefit the company's activities

- Any further work that needs to be done
- (*Probably*): What it will cost

See:

- **Executive Summary** in Chapter 3: *An Abstract, a Summary, an Executive Summary*, page 60
- **Conclusions** (page 39) and **Recommendations** (page 40) in Chapter 2: *The Core Chapter*.

**2. Senior management of an organisation may not have your specific knowledge of the field.** They may have expert scientific or engineering that is not specifically in your area or be even further removed such as accountants or lawyers and so on. Moreover, your report may be passed on to other people whom you may not have expected to read it, e.g. local government personnel. This means the following:

- **Your report should be able to be understood by non-experts** – at least in overview, meaning and implications.
- It also needs to be written so that everyone can extract from it what they need, *without having to read the whole document*.
- Even if they read the whole document, readers will need a clear pathway to help them navigate through it. The *Executive Summary*, *Recommendations*, *Conclusions* and section summaries are crucial parts of this. See *The Importance of Overview Information*, Chapter 1: Structuring a Document: Using the Headings Skeleton, page 11.

### Possible structure of a management report

Section	Cross-Reference to Relevant Part of This Book
<i>Title page</i>	See <b>Title and Title Page</b> , Chapter 2: <i>The Core Chapter</i> , page 19
<i>Letter of transmittal</i> (Cover letter), if needed	See <b>Letter of Transmittal</b> , Chapter 10: <i>A Formal Letter (Hardcopy or Online)</i> , page 131.
<i>Executive Summary</i>	See Chapter 3: <b>An Abstract, a Summary, an Executive Summary</b> , page 60
<i>Recommendations</i>	See <b>Recommendations</b> , Chapter 2: <i>The Core Chapter</i> , page 40
<i>Table of Contents</i>	See <b>Table of Contents</b> , Chapter 2: <i>The Core Chapter</i> , page 23
<i>List of Figures</i>	See <b>List of Figures</b> , Chapter 2: <i>The Core Chapter</i> , page 26
<i>List of Tables</i>	See <b>List of Tables</b> , Chapter 2: <i>The Core Chapter</i> , page 26
<i>Glossary of Terms and Abbreviations</i>	See <b>Glossary of Terms and Abbreviations</b> , Chapter 2: <i>The Core Chapter</i> , page 27
<i>Acknowledgements</i>	See <b>Acknowledgements</b> , Chapter 2: <i>The Core Chapter</i> , page 23
The following four sections may be required in a consulting report:	
<i>Purpose Statement</i>	See <b>Purpose Statement</b> , Chapter 2: <i>The Core Chapter</i> , page 31
<i>Problem Statement</i>	See <b>Problem Statement</b> , Chapter 2: <i>The Core Chapter</i> , page 32

Section	Cross-Reference to Relevant Part of This Book
<b>Scope (or Scoping) Statement</b>	See <b>Scope Statement</b> , Chapter 2: <i>The Core Chapter</i> , page 32
<b>Procedure Statement</b>	See <b>Procedure Statement</b> , Chapter 2: <i>The Core Chapter</i> , page 32
<b>Background or Introduction</b> or both	See <b>Background and Introduction</b> , Chapter 2: <i>The Core Chapter</i> , page 32
The body of the report	
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(structured under a series of headings appropriate to your topic)	
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<b>Conclusions</b> (if not placed at the beginning) or <b>Conclusions and Recommendations</b>	See <b>Conclusions and Recommendations</b> , Chapter 2: <i>The Core Chapter</i> , page 39
<b>References</b> (if needed)	See Chapter 15: <i>Referencing</i> , page 169
<b>Appendices</b>	See <b>Appendices</b> , Chapter 2: <i>The Core Chapter</i> , page 42

**Checklist for a consulting/management report**

- ☐ Is it written in a style that enables a reader with no specialist knowledge in this area to understand it?
- ☐ Does it contain a clear road map made of overview information throughout your document: an *Executive Summary*, *Recommendations* and *Conclusions*, and in a long report, section summaries? These are vital sections to aid a non-specialist's understanding.
- ☐ Will the reader understand how your work will benefit the company?
- ☐ Do you state what needs to be done next?

**A Recommendation Report**

**Purpose**

To make a recommendation or a series of recommendations, supported by a reasoned argument, together with appropriate background material, facts and data.

**How to write it**

- A recommendation report is focused towards the future: it should show the ability to objectively assess a set of conditions and to recommend actions to be taken.
- Recommendations are your subjective opinions about the required course of action, but this doesn't mean you can go into wild flights of fancy.
- No recommendation should come out of the blue; your report should contain adequate supporting information for each recommendation.

**Possible structure of a recommendation report**

<p><b>Title Page</b></p> <p><b>Executive Summary</b> or <b>Summary</b> or <b>Abstract</b> Summarise the background material and your investigation.</p> <p><b>Recommendations</b> List your recommendations. Or instead, use a section called <i>Conclusions and Recommendations</i> and place it at the end of the report (see below).</p> <p><b>Contents Page</b></p> <p><b>List of Illustrations</b> (if needed)</p> <p>The following four sections may be effective in a recommendation report, either before the <i>Introduction/Background</i> or as sections of it.</p> <p><b>Purpose Statement</b></p> <p><b>Problem Statement</b></p> <p><b>Scope (or Scoping) Statement</b></p> <p><b>Procedure Statement</b></p> <p><b>Introduction or Background</b></p> <p>Subheadings appropriate to the topic and covering the methods and results.</p> <p><b>Conclusions</b> Note: You may be required to write a section called <i>Conclusions and Recommendations</i>. In this case, place it here at the end of the report, and omit the <i>Recommendations</i> section after the <i>Abstract</i>.</p> <p><b>List of References</b></p> <p><b>Appendices</b></p>	<p>See <b>Title</b> and <b>Title Page</b>, Chapter 2: <i>The Core Chapter</i>, page 19</p> <p>See An Abstract, a Summary, an Executive Summary, Chapter 2: <i>The Core Chapter</i>, page 60</p> <p>See <b>Recommendations</b>, Chapter 2: <i>The Core Chapter</i>, page 40</p> <p>See <b>Table of Contents</b>, Chapter 2: <i>The Core Chapter</i>, page 23</p> <p>See <b>List of Illustrations</b>, Chapter 2: <i>The Core Chapter</i>, page 44</p> <p>See <b>Purpose Statement</b>, Chapter 2: <i>The Core Chapter</i>, page 31</p> <p>See <b>Problem Statement</b>, Chapter 2: <i>The Core Chapter</i>, page 32</p> <p>See <b>Scope Statement</b>, Chapter 2: <i>The Core Chapter</i>, page 32</p> <p>See <b>Procedure Statement</b>, Chapter 2: <i>The Core Chapter</i>, page 32</p> <p>See <b>Introduction</b> (page 28) and <b>Background</b> (page 30), Chapter 2: <i>The Core Chapter</i></p> <p>See <b>Conclusions, Recommendations</b>, Chapter 2: <i>The Core Chapter</i>, page 39</p> <p>See Chapter 15: <i>Referencing</i>, page 169</p> <p>See <b>Appendices</b>, Chapter 2: <i>The Core Chapter</i>, page 39</p>
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**Checklist for a recommendation report**

- ☐ Are your recommendations clearly stated?
- ☐ Are your reasons for making these recommendations clearly stated and supported by reasoned arguments?