# Technology Consulting in the Community

## CONSULTING REPORTS:  Purpose, Value, and How To Review

### Communication--Consultant's Added Value

Technical consultants are often challenged by the task of communicating information and ideas.  A technician is able to assess a problem, determine the solution and then implement the solution.  A consultant does much more.  A consultant is able to assess the situation, understand the client's goals and priorities, develop possible strategies bringing their knowledge and experience to bear, communicate the pros and cons of those strategies, facilitate the client in making a decision about what course to follow, understand why certain strategies are chosen by the client, implement those strategies in a way that the client owns the problem and the solution, examine the outcomes of those strategies, evaluate those strategies with the client, develop a better understanding of the situation as a result of those strategies and offer future directions based on that understanding.  The added value a consultant offers depends on the consultant's ability to collect, analyze and reflect on information, research possibilities and offer effective forward-thinking strategies.  However, this value is not added unless the consultant is able to communicate the information and ideas.

### Final Consulting Report

The Consulting Report is not a diary of activities; rather, it is a synthesis of information and thinking about the client's situation.  Yes, it documents what was accomplished during the consulting contract but more importantly it provides a blueprint for the client to sustain the progress.  It provides a rationale for the time and money spent and a rationale for why the client needs to move their organization in a certain direction.  It is collateral used to initiate change.

### Project Reports

An example of a consulting nightmare is to provide a final consulting report that the client refutes—a report that is fraught with errors, misunderstanding and recommendations that are either impractical or far from the client's priorities.  Frequent communication is important to identify and address little problems before they become big ones.  In software programming, it is easier to compile and test out small components incrementally instead of writing a complete system and then debugging it as a whole.  The communication between consultant and community partner should be handled similarly.  It is critical for the consultant to produce project reports during the consulting process that make concrete the consultant's understanding and planning.  It is crucial for the client and the consultant to work as a team to debug the understanding, the analysis, the strategies and the recommendations.

During the consulting process, an effective consultant records information and checks that information with the client for accuracy and completeness.  Project reports reviewed by the client, serve as a mechanism for them to develop a shared understanding and forge ahead toward new horizons together.  An effective consultant uses project reports as tools for the consulting process, not as reports to demonstrate writing prowess or as reports that the client somehow grades.  An effective consultant recognizes that people communicate differently and that words have different meaning in different contexts.  Project reports serve as a way to reveal communication land mines as well as accuracy and completeness.

Recording information and noting ideas during the process (rather than at the end) allows the consultant to collect first impressions and information that may be lost by the time the consultant reaches the end of the contract.  This information or details may be important for the client to accept the consultant's analysis and rationale.  By the time the consultant reaches the end of the consulting contract, details and impressions are often lost.  The ability to shape the final consulting report is only as good as the information that went into developing it.  This is why the project reports are so important.

Project reports serve to develop your thinking about the client's situation.  By writing and re-writing your project reports, you may discover ideas that you missed the first time around.  By working and re-working the project reports, you are able to analyze the situation and better discern what is important.

### Reports as Consulting & Thinking Tools

Consultants quickly move beyond the anxiety of writing and begin to use writing, just as they would any other tool.  One of the best ways to use reports as tools is to get feedback from others, getting feedback from different perspectives.  What is clear to a person with technical background may be lost on someone without that background.  A reader without the technical background may ask a question:  What does this mean?  The consultant is able to take that question and rephrase the content for maximum understanding by the intended audience.

Few of us like to write and many of us are timid about sharing our writing for fear that it reveals disorganized thinking.  In US culture, students are graded more on their use of grammar and sentence structure than they are on the content of their ideas.  Thus, there is anxiety about sharing writing.  Yet, it is through good grammar and sentence structure that we are able to communicate ideas effectively.  While they go hand-in-hand, an editor can help with the structure, but an editor cannot develop your ideas.  Writing and responding to feedback can help you develop your ideas.

## Readers help you develop your understanding and ideas

In this course, you have the rare opportunity to practice using writing as a tool for consulting—as a tool to develop and communicate understanding and ideas. Multiple readers will review each project report, offering the consultant multiple perspectives.

**Community Partner**: Primarily, the Community Partner is reading for accuracy and completeness. The Feedback Form they complete and return to the Instructors will guide their feedback. Typically, the CP discusses their feedback with you in person. At that time, use their feedback as inputs into the consulting process itself. You may need to give your Community Partner guidance on how to give you feedback.

**Colleagues/Peer Reviews:** Members of your project team in the class serve as colleague reviewers, providing peer reviews. Your peers are reading to challenge your thinking. Since you share a common field, colleagues challenge your assumptions, your methods and your conclusions. At the same time, colleagues will congratulate you on a job well done and offer suggestions from their own work that might advance your work. A Peer Review does not tear down but rather fortifies the foundation of your work and offers suggestions on how to improve it.

**Professional (Mentor) Review:** The course mentors will read your document as career professionals. They will conduct a peer review but with an extra mentoring aspect added. Given their extensive experience, they have seen wave after wave of new technology as it impacted organizations. They may offer suggestions on resources or a broader perspective to consider.

**TA Review:** The course TAs will read your documents in two ways. First, they will be looking for how you are meeting the expectations of the class and offering feedback on how you can improve your document to better meet those expectation. Secondly, the are reviewing the technological aspects of your approach, and will be providing feedback regarding your technical solutions and ways that you can improve them.

**Instructor**: The instructor will be looking at how the document meets the required criteria for the report, how it communicates clearly the thinking behind your consulting work. He will look at the character of your ideas, revealing hidden assumptions or challenging premises upon which your report might be based. The instructor will also grade your reports.

## GUIDELINES FOR REVIEWERS:

Your review is not to evaluate or grade the consultant's work. Your review is to help and support the consultant to produce the best document possible. Your feedback will be helpful not only to the development of the document but also to the consulting work itself. By offering feedback on the document's contents you may help the consultant develop a different or improved approach.

Provide supportive comments that affirm the consultant's efforts, and be specific about what you are referring to and why. For example, provide comments such as: *"The diagram of the room you provided was great. It helped me understand why the space issue was so important and why budgeting for furniture and renovations have a high priority."*

Ask questions where things are unclear. *"You indicate that the CP doesn't use the computer much but it is unclear as to why that is significant. Why doesn't he? Is it because he doesn't have the skill or knowledge to use it or because he delegates work to others and hasn't yet found it to be a useful tool in his own work?*

Note where additional information might be helpful. *"As a reader this is unclear to me. Is this a recent problem? Have they tried to fix it before? Is it a chronic problem?"*

If you have a suggestion on how to communicate an idea differently, you may want to offer alternatives. *"Rather than "the CP doesn't know enough to make good purchasing decisions," why not cast it in the positive: the CP wants to increase her knowledge so she can make more informed purchasing decisions."*

While it is not required, you may also choose to note editorial type changes that are needed, e.g., spelling, grammatical structure, etc. *"I suggest you go back and look at verb tense in your document. It's confusing as to what is past, present and future."*

Offer suggestions and guidance or point to other resources that might help the consultant develop their own thinking. *"You may want to consult with the latest copy of PC World. It had an article in the last issue on the travails of upgrading computers." Or "Call Elizabeth Smith at CTE. She has been working in this area for years and might have some ideas to offer.*