Consulting Project Final Report

For

[Insert your organization name here]

Prepared by: [Insert name here]
Email Address: [Insert email address here]
Date: [Insert date here]

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Change is one of the few constants in life – and change, especially change in technology is accelerating.

What is change? Carr et al. (1996, p. 67), defined change as "a significant disruption in established patterns of behavior and / or expectations." Of course, significant is in the mind of the beholder, but clearly, we are all experiencing change in our personal and professional lives.

Why plan for change? Effective planning leads to:
- Improved decision-making
- Higher profitability
- Lower risk

There are all sorts of change projects – changing suppliers, new product or service development, outsourcing, process improvements, R&D, innovation, mergers & acquisitions, downsizing, employee development, market development, corporate restructuring, bankruptcy, IPO's, among many others.

The key drivers of change include factors in the remote environment: governmental / political / legal, social / cultural, economic, technological, demographic, and ecological; the industrial or competitive environment; and the operational environment.

Change is about endings and new beginnings. Bridges (1991, p. 52), wrote "to make a new beginning, people need The Four P's: the purpose, a picture, a plan, and a part to play." A change management plan should address these Four P's. The technology part is the "easy" part of the change; the more "difficult" part is the people or cultural part.

This paper is about decision-making to solve a problem. The problem could be a change management problem to initiate, build, and implement a technology product, service, or infrastructure in an organization of your choice.

Examples include a knowledge management initiative, software development, hardware and software upgrade, systems integration of new hardware and software, outsourcing desktop support, an electronic business initiative, developing a corporate Website, an OD or other intervention, or a new business development among other things.

Wetherbe (1994) wrote, "generally improvement projects come from some combination of *problems*, *opportunities*, or *directives"* – see definitions in the glossary. The PIECES framework is a useful means of classifying problems, opportunities, and directives. Each letter of PIECES is a category and is illustrated below.

P	The need to improve *performance*
I	The need to improve *information* (and data)
E	The need to improve *economics*, control costs, or increase profits
C	The need to improve *control* or security
E	The need to improve *efficiency* of people and processes
S	The need to improve *service* to customers, suppliers, partners, and employees.

Note1: The information provided above should be deleted as it is informational only.

1. Executive Summary

In preparing the executive summary, keep in mind that the summary will probably be the only part of the project top management will review. It will be assumed that the full document provides all the support needed to reinforce both your conclusions and recommendations. For that reason, it is imperative that any recommendations you make in the summary be fully documented in the full project report, and that no conflicts exist between the summary and the project report. As you plan the summary, decide which conclusions and recommendations you consider the most important for management to accept.

Your summary should be one to two pages that highlight the recommendations from the project. Key findings and supporting data can be in bullet format. Conclude with a summary of recommended future action.

2. Organization (Client) Name and Background

This section should provide the client's name, some background information on the client, and any previous engagements with the client.

3. Project Description

The problem statement should include both the client's definition of the problem as well as your analysis of the causes underlying the problem. What factors do you believe should also be explored to assure that you are dealing with the correct problem?

3.1. Problem Identification

If you solve the wrong problem, you have not solved the problem at all. This critical first step needs to be undertaken with care to ensure that the problem is correctly identified. Often a problem can be structured as the gap between the current state and a desired state. If sales are flat and the organization's objective is for them to grow 15 percent, you clearly have a performance gap. If it takes 10 days to create a price for a custom order and the expectation in the marketplace is for it to take less than 1 minute, you have a gap. One of the most common mistakes in identifying a problem is to bury it under a solution. Avoid framing the problem as "Should we introduce an upgraded version of the software (product) to increase our sales to the objective growth rate?" Note that the new product is a possible solution to increase sales and is posing as the problem when it really is not. You should also check with the key stakeholders to make sure this really is a problem and that you have correctly captured the problem in your problem statement.

Guideline for Developing a Problem or Opportunity Statement
Developing a problem statement that will enable a leader to create value requires patience, energy, and focus. And it will take time. There are five simple guidelines that can help you define the right problem the right way. These guidelines are described below (UOP document, "Defining the Problem").

Scan the Environment Thoroughly with the Intent to Move Forward and Create Value: Before you write the problem statement for any business or personal scenario or situation, scan the internal and external environments to get a complete understanding of the situation. Once a leader understands the environments, his or her role is to identify the challenges and opportunities that should be assessed and addressed. It is this process of scanning in order to identify the opportunities and challenges to be addressed that enables a business or an organization or a person to move forward and ensure success. This focus is a key step that enables leaders to grow their business and continue to add value to all of the key stakeholders, including customers, shareholders, and employees.

Turn Problems into Opportunities: Although we talk about *problem solving*, a better term may be *opportunity realization*. It is a lot easier to identify the problems or challenges in any situation than it is to identify the opportunities. However, problems often have very narrow solutions and seldom consider the future or create significant value. By scanning the entire environment and focusing on defining opportunities, rather than just challenges or problems, the possibilities expand and the likelihood of focusing resources on the right things to add value and move the organization forward also expands. Taking a broad positive approach to these situations allows one to define the broadest opportunity. As Albert Einstein said, "In the middle of difficulty, lies opportunity."

Write a Statement that Allows for Many Possible Solutions: When considering the situation, including the opportunities and challenges, develop a problem or opportunity statement that enables the possibilities. That is, develop the statement in such a way that you can use it to define a broad range of alternative solutions. When trying to define a problem or opportunity, many people actually end up defining a solution. The best way to avoid this is to check the statement and ensure you can identify many different solutions.

Make it Motivational: Define the problem or opportunity to be motivational to those who will be involved in addressing or realizing it. If it is motivational, it is more likely to engage the minds and hearts of those you need to address it—including yours.

Make it Clear and Simple: Write the final version of your problem statement in 25 words or less. Ensure it is written so everyone can clearly understand what it is. This will enable those involved to understand the essence of the problem and develop a broad set of alternative solutions to address the problem or opportunity. However, a simple statement is not necessarily a "good opportunity statement."

Useful tools to apply in this section include:

- Active listening
- Critical thinking
- Financial analysis
- Systems analysis
- Systems thinking

3.2. Investigate Cause of Problem

There are a variety of analyses to discover the cause(s) of a problem, particularly when it is correctly stated as a performance gap. This step is important since it will generate ideas for possible solutions. If sales are flat and you want them to grow 15 percent, investigating the causes of why your customers are not buying might turn up a variety of reasons: poor customer service, a stagnant market for your business, products that are out of line with customer needs, a crowding of the market with viable products from other competitors, non-competitive price, inappropriate distribution channels, and so forth. You can now research and analyze each of these to narrow the scope of what has caused your problem.

Useful tools to apply in this section include:
- Active listening
- Critical thinking
- Data modeling
- Financial analysis
- Interviewing
- Market research
- Process modeling
- Surveys
- Systems analysis
- Systems thinking

4. Planned Intervention

Briefly describe your ideas for solving the client's problem.

5. Appendix

5.1. Entry and Contracting

Some questions you may want to consider responding to in this section.
- What did you agree to study in this project? What were the boundaries?
- What benefits did you identify? What were the overall objectives of the project?
- What are the information requirements? What will the client provide in terms of access to information?
- What was your role? What was the client's role?

- What product did you agree to deliver?
- What support did the client agree to provide?
- What was the time schedule for the project?
- What were the confidentiality requirements for this project?
- Will the project require feedback at a later date?
- What resistance did you encounter during the contracting phase? How did you deal with it?

5.1.1. Project Study Agreements

This section should document the agreements of the study and boundaries as known.

5.1.2. Objectives / Benefits

This section should document identified objectives and benefits of the study.

5.1.3. Information Requirements

This section should document the data or information requirements for the study as well as what the client will provide in terms of access.

5.1.4. Roles

This section should document your role in the engagement along with the role of the client.

5.1.5. Product Delivery

This section should document the product you agreed to deliver to your client.

5.1.6. Support to be Provided

This section should describe the support to be provided by the client.

5.1.7. Project Schedule

This section should provide a basic time frame for the project.

5.1.8. Confidentially Requirements

This section should list or describe any confidentially requirements agreed to with the client.

5.1.9. Follow-up Feedback Requirements

This section should document any feedback requirements agreed to with your client.

5.1.10.   Resistance Encountered / Resolved

This section should provide a list of resistance encountered during the engagement and how it was resolved. Examples include the expected cost of the engagement, the timing of the engagement, and so on.

Resistance Encountered	Resolution

5.2.   Discovery and Dialogue

Some questions you may want to consider addressing in this section.
- What did you do to discover the "real" problem (as opposed to the "presenting problem")?
- What problem redefinition occurred?
- How did you collect the data?
- What process did you use to analyze the data?
- How did you obtain the data?
- What did the data show?
- What conclusions did you draw?

5.2.1. Real Problem Discovery

This section should describe how the "real" problem was discovered; for example, through interviews, observations, documentation, or other process or some combination of the above.

5.2.2. Problem Redefinition

This section should describe the "real" problem if different from the initially proposed problem.

5.2.3. Data Collection (Obtain) Process

This section should describe the data collection process followed in order to acquire the requisite information. Be specific.

5.2.4. Data Analysis Techniques Used

This section should document the data analysis methods or techniques used in this consulting engagement.

5.2.5. Data Show

Summarize the outcome of the analysis – see sections above on analysis. That is, what did the data show in terms of a problem, solution, or related factors of the engagement.

5.2.6. Conclusions

Summarize your conclusions here.

5.3. Feedback and Decision to Act

Some questions you may want to consider addressing in this section.
- How did you prepare the feedback for the client?
- What happened when you presented the feedback?
- What recommendations did you make? What was the client's reaction to these recommendations?

5.3.1. Client Feedback Preparation

Describe feedback deliverables given to the client and how this feedback was prepared.

5.3.2. Outcome of Presented Feedback

Describe what happened when this feedback was presented to the client.

5.3.3. Recommendations / Client Response

What recommendations were given to the client and what were the responses?

5.4. Engagement and Implementation

What method or methods were recommended for implementation?
Will your recommendations engage employees in the process? If so, how? If not, why not?

5.4.1. Methods Recommended

5.4.2. Engagement of Employees

5.5. Final Recommendations

Reflect on the problem, the solution, and the client's acceptance of the solution.
Some questions to address in this section include.
- What are your final recommendations to the client?
- What limitations, if any, do you see in your approach?
- What unintended consequences might there be? How will you reduce the probability that these will occur?

5.5.1. Final Recommendations

Describe any final recommendations to the client.

5.5.2. Limitations

Describe any limitations you see in the recommend solution.

5.5.3. Unintended Consequences

Describe any unintended consequences if any.

5.6.   Charts / Illustrations / Diagrams

Place large charts, illustrations, or diagrams in this section and summarize in the body of the paper and reference this section in the Appendix.

5.7.   References

List all references used in creating this paper in APA format here.

Some possible references are the following. Include at least four references of your choice that are actually used in creating this paper.

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5.8.   *Glossary of Terms*

Provide a glossary of terms using the table below. These should be terms the reader may not be familiar with.

Term	Definition