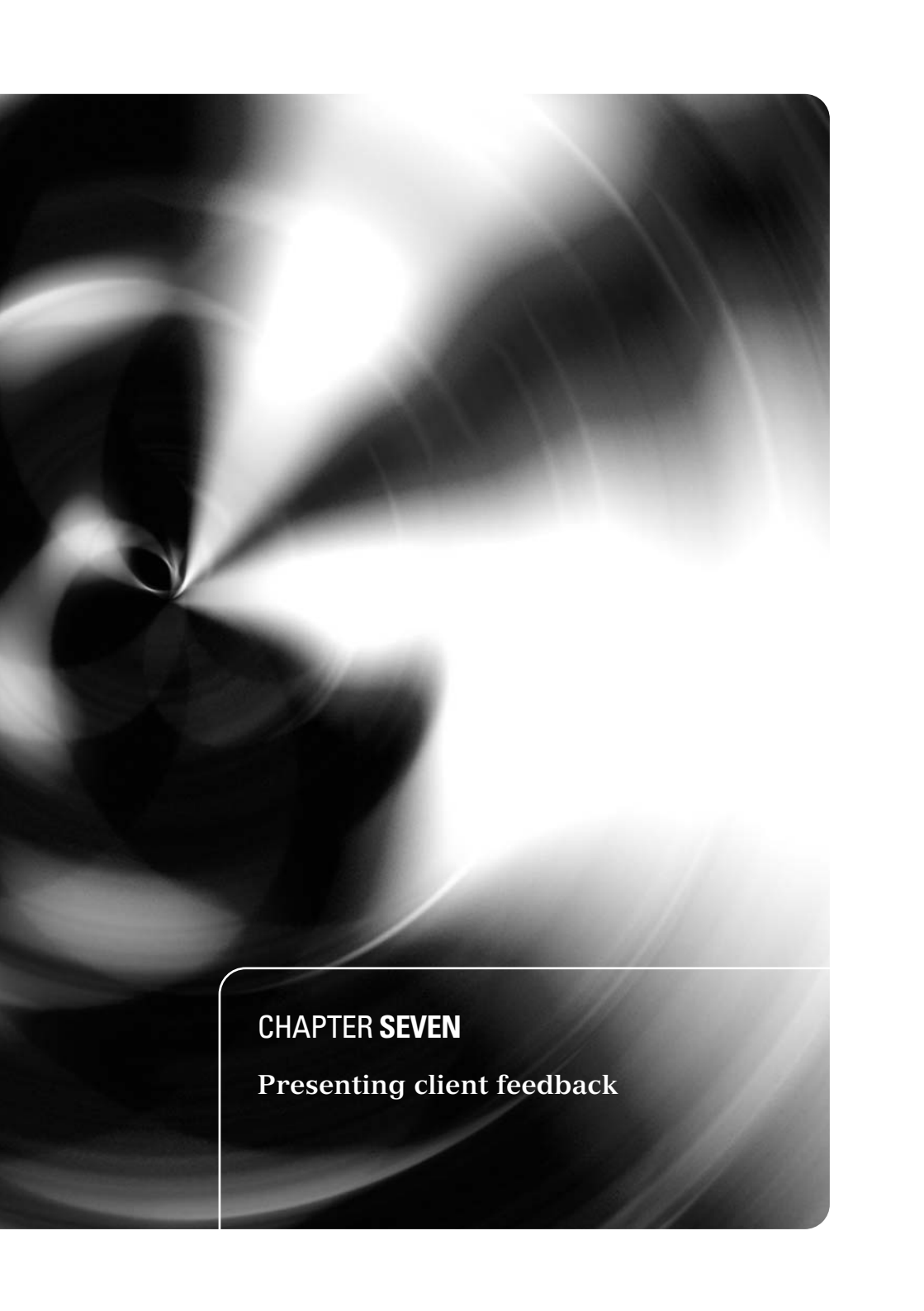




CHAPTER SEVEN

Presenting client feedback

SEVEN

Presenting client feedback

A vital part of the consulting process involves providing your client with continuous feedback on the progress of their project. Being proactive and keeping your client up-to-date concerning developments and problem areas is fundamental. On large and complex projects, client feedback should occur on an almost daily basis. But in every consulting project, regardless of size, there needs to be structured phases of client feedback that follow the key milestones in your project timetable.

When providing a client with feedback you must be operating to the best of your ability. Your client is looking to assess your capability and professionalism. At the same time you will be aiming to secure your client's ongoing commitment to any of your findings or proposals. So it is crucial that the feedback process is managed in a skilled and effective manner. You have to lead your client through a logical analysis and at the same time deal with any issues or problems that might arise. In most cases this demands that you try to pre-empt difficult questions and issues that might be pre-occupying your client. When you manage feedback successfully, your client will not only feel comfortable with the quality of your work but they will also develop greater confidence in working with you.

Of course, when meeting clients on a regular basis you should aim to utilise many of the skills outlined in our interviewing section, but the two formal elements of presenting client feedback involve:

- report writing; and
- making formal presentations.

Both of these activities have to be mastered. In the following sections we provide an essential guide to the do's and don'ts.

Introduction to report writing

Client reports have two fundamental objectives:

- To provide information that significantly informs your client about a particular problem or issue.
- To influence your clients towards a particular view and form of action to solve the problem.

A project report is a major deliverable to a client and they will view reports as major evidence of your ability, professionalism and success in tackling an assignment. The ability to communicate effectively in writing is therefore vital. A well written report supports and promotes your continued involvement in a project. It should also be viewed as a major marketing opportunity.

The advantages of written reports are that they:

- Provide documentary proof of your proposals.
- Are a formal record of your work.
- Can be structured to communicate to different levels of client.

- Impose strong disciplines in planning and structuring your work plan – as well as any final report structure.
- Allow your client time to reflect on your work.
- Focus your client on the critical issues and actions.
- Can be an efficient method of communicating your work to a wider audience.

The disadvantages of reports are they can be:

- Expensive to produce in terms of consulting time and cost.
- Liable to client misinterpretation.
- Abused by clients or others through selective editing or quoting out of context.
- A client substitute for taking real action on a problem – ‘We have a review underway!’
- Ineffective unless accompanied by a strong formal consultant presentation.
- Capable of being ignored or not read by clients.

A consultant’s report can communicate authority if it is clear and well-structured. Badly written reports can destroy your credibility, your work and your recommendations. A report will only generate an appropriate client response if the original terms of reference have been fully met and you have successfully managed the client’s expectations with regard to its content and structure. An effective client report should therefore describe:

- What you set out to do for the client.
- What you have done in terms of work-plan and analysis.
- What options or actions your client should consider in the future.

- The reasons why your recommendations should be implemented.
- The benefits of your approach and proposals.

A good consultants report will also:

- Provide a permanent record of the work undertaken.
- Avoid misunderstandings (bearing in mind that clients sometimes hear what they want to hear).
- Confirm any client/consultant agreements.
- Clarify major issues.
- Influence your client's thinking.
- Secure client agreement and action.



Insight

An excellent test of the clarity of any report is that it can be understood at a first reading by anyone who does not have a detailed understanding of the project or problems under review.

So give your initial draft reports to someone who has had no involvement in the project and get their reaction. Ask them if it makes sense?

Different types of client report

Persuasive

This type of report is commonly used by consultants when trying to initiate some form of change. It aims to influence and persuade a client to adopt a particular approach or plan.

Instructive

This report advises clients how to do something specific, e.g. to introduce a new system or process, begin an integration plan.

Investigative

The investigative report is fact based and relies heavily on confirmed and validated data to put forward an analysis or report on a problem. For example you might be asked to analyse the results of a survey with no interpretations being attached to the data.

Getting your report structure right

The starting point for structuring your report is to begin with a review of your broad findings, conclusions and recommendations. These areas should define the content of your report. You will then need to consider:

- Dividing your report into major sections of your project, e.g. management reporting, production, IT, etc.
- Reviewing each section in turn. Describing the current situation, key findings, recommended changes and future actions for each section.

- Distinguish between the major and minor points of the key areas. Any minor points are best covered in an appendix to avoid cluttering the main body of your report. Also avoid too much cross-referencing. Aim for a balance between your main text and appendices.
- Present a logical flow in your analysis and link the various sections effectively.

A typical report structure

Introduction

This should cover the background and circumstances surrounding the project. Why it was undertaken. It also need to highlight the key events and client concerns.

Scope of the assignment

This section describes the subject areas under review and highlights any limitations that surrounded the work undertaken. You should list your project timetable, the sources from which you obtained information and detail the response rates to any questionnaires.

Executive summary of conclusions and recommendations

This is the executive summary intended for busy readers who wish to obtain a quick and focused overview of your report. The reader should be able to grasp the essence of your work and proposals by a quick read of this section. It should therefore be written in a bullet point format. Key findings and conclusions should be clearly listed and cross-referenced to any recommendations.

Findings and conclusions

This describes the current position surrounding the problem. It is important not to assume that your client is aware of, or understands the present situation. An unbiased and well-written description of the current situation can be enormously helpful for clients. It often helps to sharpen their thoughts and helps them to focus on the central challenges or problems. List your key findings at the end of this section and make sure you have data to back up your observations.

Keep this section as fact based as possible, prior to developing your conclusions which should flow naturally from the findings.

Options and recommendations

This section should flow from a clear analysis of your conclusions. Once you have detailed your conclusions then develop a range of options to address the problem. This will enable your client to see what scope they have to act on the problem.

Any final recommendations must follow on logically from your conclusions and should contain no flaws in your analysis. Every recommendation must be linked to one or more of your conclusions. In turn you need to provide as much detail as possible in your recommendations.

Implementation plans

It is no good telling a client they need a new system if they have no idea how to go about it. Any implementation section must provide a clear road map to help your client see the way ahead. Recommendations need to state:

- What improvement actions are required.
- Who should take action.

- When improvement action should be taken.
- How long the actions will take to implement.
- What the benefits of the improvements action will be.
- What potential costs are involved.

Future assistance

This is the sales element of your report! It should set out the benefits of your approach and detail how you might assist the client in moving to the next stage.

Closing paragraph

Thank the client and their staff for their co-operation and help during the project. Emphasise your willingness to continue the working relationship and provide further assistance

Appendices

Appendices contain those details and facts that would otherwise clutter the main body and messages of your report. They do however, need to be included as they provide further support for your work and findings.

Writing a client report

When you begin to write a report you will invariably have too much information. A common challenge in writing client reports is therefore the need to be very selective in the final choice of content. Too much detail or an overload of facts may cause confusion. Equally, over lengthy reports that are packed with endless detail are more liable to irritate than actually please your client. Too little and you may create doubt about your whole approach.

To begin writing your report list all the topic areas and data that you consider relevant. Try to do this without judging the suitability of the information. Also, at this stage don't worry about any duplication of data. Once you have listed all the information you can then begin the process of sifting for duplication and eliminating any unnecessary data.

The next step is to begin linking the various pieces of information into themes and topic areas. At this stage you should have a good basis to begin shaping the content of your report. But ensure that you avoid information that is capable of creating client confusion or is based on gossip, or erroneous facts. Only select information and facts that are relevant to and support your main findings, conclusions and recommendations.

Begin the formal writing process by:

- Examining your terms of reference.
- Identifying the areas you are going to focus on.
- Formulating some idea of what your final report structure will look like.

Endeavour to draft or outline the key sections of your report as your project progresses in real time. This will make life a lot easier in the final drafting stage as you will have already prepared some key elements. Always allow plenty of time to write and produce your report, e.g. For a 30 page report allow a minimum of three days and have at the back of your mind that it is more likely to be five days with editing and redrafting. Also allow sufficient time to have the report read and reviewed by your colleagues. It is easy to get too involved when writing and so lose sight of some glaring omissions or errors. A second set of eyes is vital when editing a report.

You also need to:

- Reflect on your client(s) and their colleagues' perspectives on the issues. What are their relative positions in the organization and to what extent do they agree or disagree about the problems? Are they likely to agree to any possible solutions? Are they supportive or hostile? Will anyone you have to report to, already have a biased or negative view?
- Consider whether the eventual readers of your report will have a detailed knowledge of the issues involved? If not, you will need to bring them up-to-date via the report's executive summary and overview.
- Predict and deal with any possible questions that might come from your client.
- Lead your client through the report with a reasoned and logical analysis.
- Deal with any contentious issues in your report by using strong logic and fact based arguments.
- Consider your client's underlying motivation and needs in attempting to solve the problem. Are you really addressing these fundamental points?
- Keep in focus the key decision-maker(s) amongst your client's team.
- Consider any actions or agreements you require from your client. For example, you may want your client's agreement to continue funding additional research or to involve some specialist input. If so, it will be important to highlight compelling reasons for carrying out this additional work, the benefits, timescales and costs that might accrue.

- Find out whether your client will have to sell your proposals to their boss? If so, you need to help your client with this task by focusing on the benefits of your solution.
- Clearly state how your client can action any proposed recommendations.
- Indicate and promote your possible involvement in any additional follow-on work.
- Establish and agree the final distribution of the report.

Other practical tips on writing client reports

- Use plain and simple language throughout your report. Never use a long word where a short word means the same.
- Keep your sentences short. If a sentence works without a word cut it out.
- Try to avoid technical terms and un-necessary jargon. If jargon is required ensure the terms used are defined and explained. If an everyday phrase is available use it instead of any buzz words.
- Use the active tense rather than the passive – ‘*service levels have been improved*’ is preferable to ‘*an improvement in service levels has been made*’.
- Support your arguments with facts.
- Have clear, logical conclusions and recommendations.



Insight

A very powerful way to build up your report structure is to use the classic discipline of using:

- FINDINGS
- CONCLUSIONS
- RECOMMENDATIONS

Link all your findings to your conclusions and in turn your recommendations to your conclusions. This should enable you to develop a strong logic train. You should not then find yourself in a position where you are presenting recommendations that are not linked to your conclusions or even worse presenting conclusions for which you have no real findings.

You can remember this approach by recalling the following statements:

- *We found...*
- *On the basis of those findings we conclude...*
- *And on the basis of those conclusions we are therefore recommending...*

This should enable you to draw up a strong argument that will withstand your client's review. See Figure 27, over.

Remember

If people want to attack you or your recommendations they will look to criticise your analysis. So, if you are recommending actions for which you do not have any findings or conclusions you need to do some more information gathering.

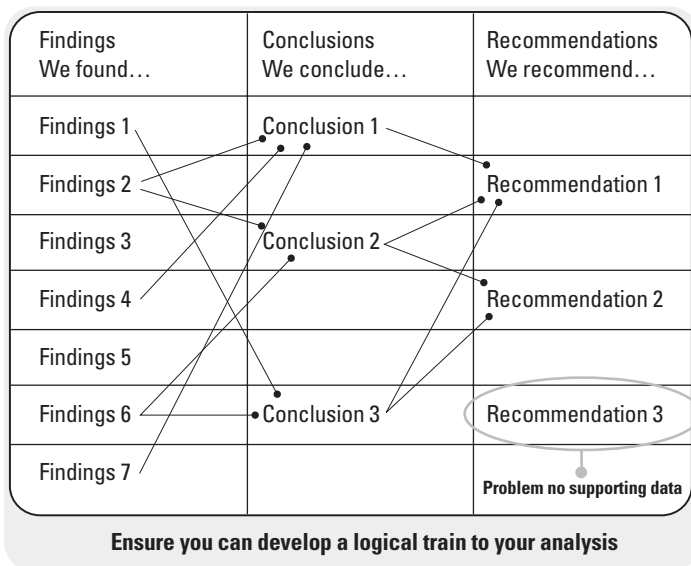


FIGURE 27: DEVELOPING A REPORT STRUCTURE

On the logistics side remember to:

- Try to make one person responsible for producing the final report. Reports that are written by committees or groups of people generally prove ineffective and seldom produce results. Collective report writing tends to sanitise any significant points or actions.
- Check the availability of your report writing services and resources. Large reports involve a lot of typing and checking – sometimes through the night!
- Agree when and how you are going to distribute the report to your client.
- Check that your client will be available when the final document is ready.
- Alert your client to any possible delays sooner rather than later.

Reviewing reports

Below are some questions for you to consider when reviewing your report:

- Have we delivered the terms of reference? If not why not?
- Have we described the scope and methods of our work and dealt with any areas we did not cover?
- Are our conclusions clear and unambiguous? Remember that you will have been very closely involved with the assignment. Issues may not be as clear to the reader as they are to you. If in doubt redraft areas that lack clarity.
- Are the recommendations clear and unambiguous? Do they address all of our conclusions?
- Is the report summary consistent with the main body of the report?
- Does the content of each section contain material that is consistent with the heading?
- Is the content, wording and style of the report appropriate to the client's needs?
- Have we used any loose language that might be prone to misunderstanding. Look out for emotive words or phrases as these can always generate strong client reactions. Remove any from your final draft.
- Have we omitted any important issues or facts?
- Have we alerted our client of any possible surprises in advance?
- Who can we get to play 'devil's advocate' in questioning any 'grey areas' in the report?
- Is the tone of our report constructive and positive, or negative and depressing?

Finally, there are some housekeeping points that are always worth checking when reviewing a final report:

- Check the contents page against the main document – are they consistent?
- Check any paragraph and appendix cross-references.
- Check the names and titles of all client personnel.
- Check the section headings and sub-headings; particularly against the contents page.
- Check that all cross-references to diagrams or charts are present and correct.
- Check appendix headings against the contents page.
- Finally ensure that the typing, printing and collation of the final report is also checked. You want to avoid missed pages, duplicated pages, incorrect formats etc. Simple but silly mistakes at this stage can destroy an otherwise excellent piece of work.

Making client presentations

Making presentations is a challenging but essential activity for any internal consultant. We have to be able to present information in a professional and persuasive manner so that the client understands, accepts and actions our proposals and recommendations. As an internal consultant we may have undertaken some high quality research and analysis for six months or more, but all this work will be wasted unless we successfully influence the client and their colleagues in a formal presentation.

As the development of presentation media continues to become more sophisticated so clients are expecting higher standards. Your presentational skills and messages need to exceed your client expectations. It is important to consider

that the vast majority of management presentations are remembered more for the presenter than the content. We cannot afford to underestimate this part of our role. We have to be able to plan and conduct dynamic and influential presentations.

Preparing client presentations

When preparing any client presentation consider your client's current position. Are they worried, confident etc? Recognise that the client is important and will want to be respected and acknowledged for their experience. Avoid any patronising comments or observations. Reflect on your client's needs and objectives. Ask yourself how you can satisfy them. Consider the following questions:

- What have we discovered about this problem or issue?
- Have we focused on the real issues? How confident are we?
- Will our findings, proposals and recommendations help the client?
- What are the problems the client needs to address?
- Are we improving the efficiency of their operation?
- Are our recommendations saving or costing the client money?
- What does the client need to do about the issues?
- What other options do they have?
- Are they going to want to continue working with us?

Having addressed these questions, decide on your own objectives for the presentation. You need to consider whether you are asking for your client's agreement or whether you are trying to secure additional resources for the project? These

questions will help you to focus further on the structure and detail of your presentation.

In developing the presentation structure make sure that it has three parts:

- A clear **beginning** involving an introduction and background overview to the project.
- A strong **middle** section which details your analysis.
- A sound **conclusion** which comprises a summary and clear suggestions for action.

You also need to consider the overall timing for your presentation and each section within it. Find out well in advance:

- Where the presentation will take place.
- Who will be in the audience.
- How much time you will have.

In deciding on the content of your presentation ask:

- What benefits am I offering my client?
- How do I propose to deal with any difficult or contentious issues?
- How will I involve the client during the presentation?
- What are my client's critical questions/objections likely to be?
- What actions will my client need to take at the end of my presentation?



Insight

Avoid being the expert and talking too much at your client. Always structure your presentation so that your client is invited to comment on your presentation at an early stage. You must get an early reaction to what you are saying. Plan a pause in your presentation after 20-25 minutes and invite client reaction. You don't want to discover at the end of a long presentation that your client totally disagrees with what you have presented.

Early feedback means you can adjust the content sooner rather than later.

Presentation media

In selecting the media to make your presentation you need to address the following questions:

- How do you propose to communicate your key points and messages? (Description, analogy, facts, graphics, examples, competitive data etc.)
- What visual aids or media will best communicate the points you wish to make?
 - PC projection
 - Overhead projector
 - 35 millimetre slides
 - Web-based
 - Flip charts
 - Slide book
 - Practical demonstration
 - DVD/Video

Also consider the room setting that you are going to be using and the logistics involved in employing different forms of media. Remember using complex equipment can increase the chances of technical breakdowns. Also, it is possible that by using overly sophisticated media you lose the clarity of your messages. Many presentations have fallen into disrepair by the over enthusiastic use of the numerous features of Microsoft Powerpoint. So keep any visual approaches in context. What is the key message(s) you want to put across?

Consider the size of client group that will be present? What kind of atmosphere do you want to create – formal, informal, relaxed, sophisticated, authoritative? All these issues involve the process side of your presentation, so consider carefully all these issues. Don't assume that just because you have produced a great analysis and report that is the end of the job. Reports do not sell themselves on their own. You have to influence your clients and this is where your skills in presenting come into play.

Delivering the presentation

Having planned the structure and content of your presentation you then have to do the hard part. Presenting to your client in an authoritative and influential manner is key. As with many of the other skills involved in internal consultancy, we can only develop real expertise in presenting by continuous practice and experience, but below are some of the essential do's and don'ts:

- Make sure you rehearse and practice. Find out if all elements of your presentation work by going through the session in detail. Don't wait to find out on the actual day if your presentation works or not. A serious rehearsal will normally reveal any weak areas in your presentation and provide you with ample opportunity to make any adjustments. If in doubt get a colleague

to sit in on the practice session and ask them to be very critical. Fine-tuning at this low risk stage is far better than on the actual day of the presentation.

- Anticipate what questions will be asked – including the obvious, difficult and ‘unthinkable’. A key part of your planning is thinking up the really awkward questions that might be asked.
- Stand up straight and project confidence.
- Vary your body posture but don’t wander around in a way that will distract your client from what you are saying.
- Avoid fidgeting and the ‘classic rattling of coins and keys in your pocket’.
- Speak in a slow but clear and pronounced fashion.
- Smile – it connects with people and says you are pleased to be there.



Insight

Always make your client feel strong rather than weak. Clients do not want to hear that they are either failing or no good. So concentrate on motivating your client. This does not mean avoiding difficult issues but recognise the fact that your client may have been experiencing difficult and challenging circumstances.

Give clients credit wherever possible and avoid slipping into critical or patronising statements. The fact is that in some situations it may indeed look bad but you still have to find something positive to say. Any client that has to listen to a presenter that has nothing positive to say is likely to become an unhappy client. Your job is to make them feel strong!

- Project authority in your voice. A hesitant and mumbling delivery will irritate your audience and destroy your credibility.
 - Vary your sentence length.
 - Vary the pitch, tone and pace of your voice to match your presentation.
 - Use facial expressions that match your presentation content – smile at humour, and try to demonstrate surprise at an important finding or key issue.
 - Use hand gestures to emphasise key points.
- In your introduction provide a brief background to the project and highlight your original terms of reference. This brings everyone up to speed. This is important because you may have some people who are intimately involved with the project and others who are somewhat remote.
- Have a powerful opening statement. A strong reference to the fundamental objectives of the project can be a good way of focusing everyone's attention. Try using for example:
 - *'Before we begin ladies and gentlemen let us just remind ourselves why we are here...'*
 - Following this opening with a hard business issue such as reducing costs or increasing sales will generally get your clients' immediate attention.
- If reporting back on the results of interviews preserve any confidentiality agreements with interviewees by reminding your clients of these assurances. This helps you avoid any pointed questions, such as 'Who said that?' which might come later on in your presentation.

- Speak the language of your business or organization. Do not clutter your presentation with esoteric jargon. Keep it simple, practical and business relevant
- Look directly at all your clients and remember to constantly scan your audience rather than stare at, or focus on, key individuals. There is always a temptation to maintain eye contact with people who are showing positive signs of interest. Remember there are other people present and you should also be trying to gauge their reaction to what you are saying. You need to identify if they seem unhappy or surprised at what you are saying.
- Make sure you summarise before, during and after each key stage of your presentation. If you are working and presenting as a consulting team make sure you introduce each speaker before they begin. We call this 'sign-posting' – it helps tell your client where you are taking them and identifies where they have been.
- Enliven your presentation by the use of appropriate comments or quotes which you recorded during the course of your research. A simple but insightful quote to illustrate some statistical or graphical point can be very powerful. But do remember to safeguard confidentiality of the speaker. If necessary make the quote anonymous except for a generic job title or role description.



Insight

When making a client presentation try to use 'WE' rather than 'YOU'. It is always easy to slip into a telling mode when giving a presentation and bad consultants start saying things like:

- You have some major problems here.
- You need to tackle these issues.
- You must address this problem.

To a client this can sound very irritating and condescending. Remember, we are on the same side so always use 'we' rather than 'you'. It helps develop rapport and sounds significantly better to your client.

Similarly use 'challenges' not 'problems'. Stating that 'we have some major challenges' is far better than saying 'you have some major problems'. Keep the language positive and upbeat.

- Watch for individual client responses as your presentation develops.
 - Nodding heads or frowns should be picked up on by reflecting questions back to the client.
 - 'You seem a little unhappy with that last point? Have we missed something?'
 - 'Is that finding an issue for you Bob?'
- Pace your presentation so that it gathers momentum from beginning to the end.

If you are presenting options to your client use a simple cost benefit approach to focus your client's thoughts. Simply using a high, medium and low rating can add considerably to any subsequent debate and will help develop your client's commitment to any eventual selection decision. Figure 28 illustrates this simple but powerful approach. Proposing options is a classic example of operating in a process rather than an expert mode.

OPTIONS	Cost of implementation	Benefits to organisation	Practicality/ease of implementation
A	HIGH	HIGH	HIGH
B	HIGH	MEDIUM	HIGH
C	LOW	MEDIUM	LOW
D			
E			

FIGURE 28: PRESENTING CLIENT OPTIONS

- Don't 'fade away' at the end of your presentation. Make sure you have a strong and powerful close.
- Allow ample time for discussion at the end of the presentation. Engaging your client is critical so ensure you allow sufficient time to discuss the issues that have been raised.
- Remember to be enthusiastic and confident – if you are not, how can you expect your clients to be?



Insight

When rehearsing your presentation invite someone in to listen who has not had any involvement in the project. They will be able to critique your presentation in a powerful way – not having any emotional involvement in the project. You may discover they raise some interesting points or questions that you have over-looked.

Presenting client feedback – being client focused

This stage involves you presenting feedback back to your client throughout a project life-cycle. It involves writing reports, making presentations and writing key reports.

Questions you should ask:

- Is your analysis rigorous, accurate and clear?
- Can you support your findings, conclusions and recommendations?
- Will your findings and recommendations help your client?
- Will your client(s) respond positively or negatively to your feedback?
- Have you managed your client's expectations in advance of your feedback presentation?

- Is your feedback presentation in the right format, style and level of detail?
- Have you spent enough time rehearsing for your presentation?
- Have you thought of all the ‘unthinkable’ questions?
- Have you adequately planned how to move your client forward to the next stage of the project?
- How will you report back to interviewees who helped you during the information gathering phase of your work?

Client’s perspective of you:

- How valid is their analysis and feedback?
- How thorough has the research been?
- Have they upset anyone during the work?
- Do I understand, accept and agree with the findings or results?
- How will my colleagues react to your findings and recommendations?
- How well have they managed the feedback process?
- Have they dealt adequately with my questions and concerns?
- Have they added to my understanding of the issues and problems?
- Do the recommendations represent a solution to the problem?

Typical client thoughts and reactions when receiving feedback – have you got the right answers?

- So what conclusions have you produced?
- I can't believe that problem is actually happening.
- I would like to get a quick overview of your findings.
- I would like to spend more time examining this issue.
- Who said that? It's rubbish, it can't be true!
- How have you come to that conclusion?
- You found that people thought...?
- I am startled to be told that...
- Was there anything positive that you discovered?
- It's all pretty bad news.
- Are we doing anything well?
- OK, what do we need to do next?
- I can't help thinking you have missed something there.
- I think you may have misinterpreted that point.
- That cannot be true.
- I tend to agree with that.
- Yes, that is interesting.
- I would like to comment on one key point.

Other statements/questions you might use:

- There were some positive as well as negative issues emerging from our investigation.
- We would like to provide you with an overview of our findings and then focus on some specific issues.

- We are not sure about this specific point, but we think what is happening here is...
- We would welcome your reactions to these points.
- You may disagree, but the results do indicate a strong negative perception about this issue.
- Perhaps we need to get additional information about that question.
- This point is certainly reinforced by section ten of our report.
- We will cover those points later on in our presentation.
- Perhaps I could cover that subject at the end of our presentation.

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