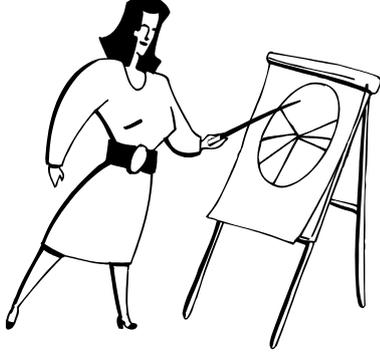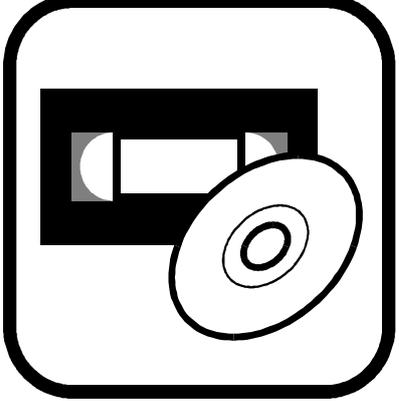# Introduction to Report Writing

A report is a form of **communication** in one or more of the following ways:

Written form	Verbal form	Audio-visual form

A report is a form of **communication** that will do one or more of the following:

➢ describes
➢ analyses
➢ summarises
➢ criticises or praises
➢ makes predictions about…

…a subject and is based on an analysis of current or past events or identifiable phenomena.

If you are studying on an undergraduate or postgraduate course you will be expected to write reports and to present findings in written and verbal and/or audio/visual forms. You will, for example, write reports:

- for module assignments, e.g. case study reports
- presenting the results of an individual research project
- summarising the result of a group project and presentation
- reflecting on a work experience or other placement you were involved in

What's the difference between a report and an essay?

There are two main differences: aim and presentation.

Aim

Essays give you more opportunity to expand on possibilities, ideas or concepts**.** Reports deal with describing and/or analysing **actual past events**. Reports can be written that make predictions or recommendations for the future, but these are usually the result of an analysis of past events or of current or past social, cultural or economic phenomena.

The English statesman, Sir Thomas More, wrote an essay titled *Utopia*, which visualised an ideal state or 'perfect world'. He couldn't have written a report on the same topic!

Presentation

Reports are also usually broken up into sections, each section with a relevant sub-heading. Bullet points, illustrations, diagrams, charts, tables can also be used in reports. Essays at the School of Management can be presented in a traditional form (no sub-headings; very limited use of tables, charts etc) or non-traditional form (with sub-headings grouping a cluster of related paragraphs and discrete use of bullet points, graphs, tables etc. In terms of presentation, the distinctions between reports and essays is beginning to disappear, although you should always check with your tutor what presentational style of essay writing is required (see also *Essay Writing 1: Stages of Essay Writing*, which looks at the issue of presentation in more detail).

A summary of the similarities and differences between essays and reports can be seen on the next page.

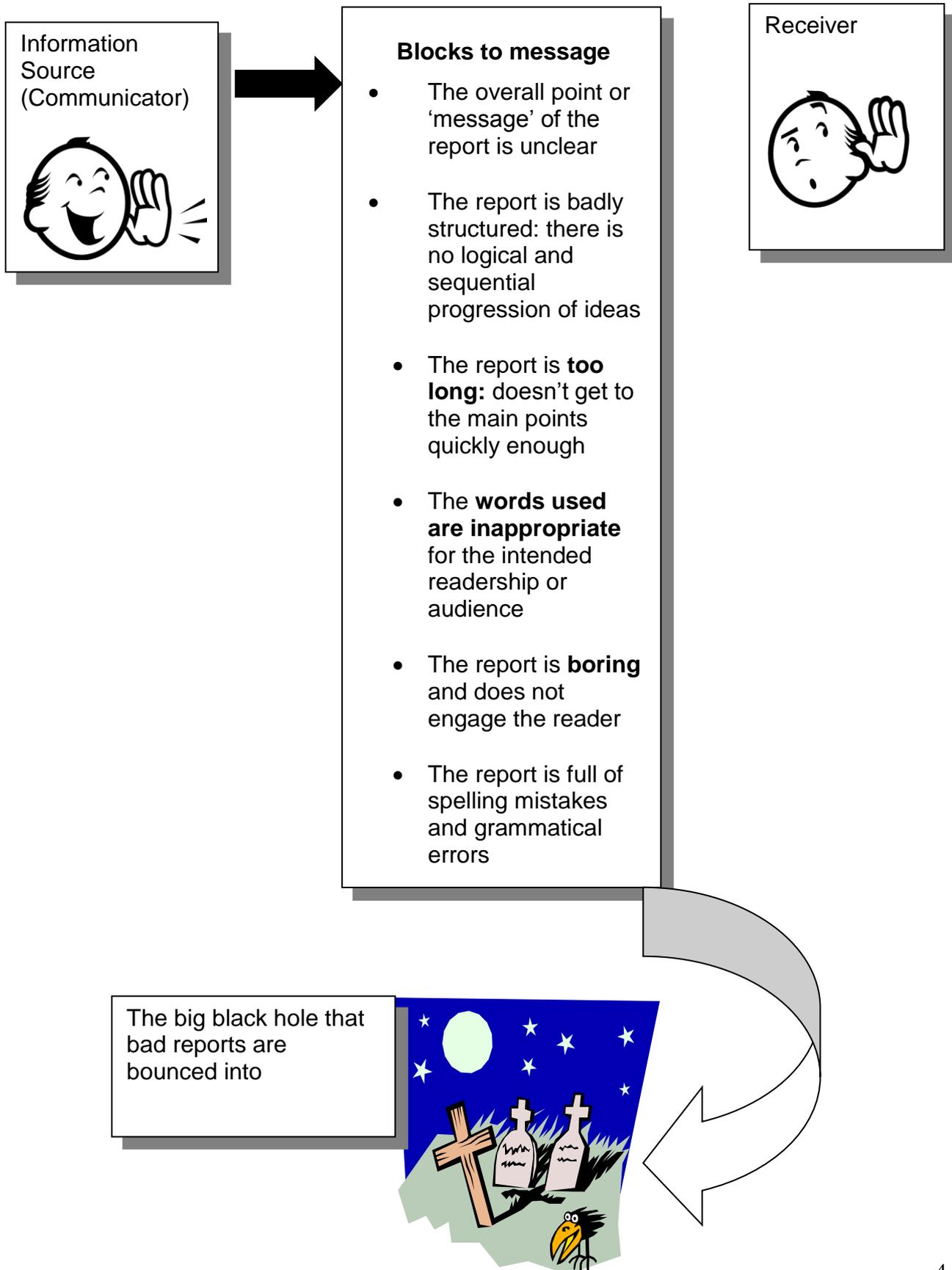# Summary of similarities and differences between essays and reports

Similarities	**Differences**

Similarities

➢ Both should have one or more central points to make – and these central points should be given emphasis in both.

➢ Both can include references (*essays usually **will** include them, although reports **might,** depending on the report*).

➢ Both should include an introduction and a conclusion (*or summary/recommendations section in the case of a report*).

➢ Both should be well structured and have a logical progression of ideas (see next point).

➢ Well-structured reports or essays have text broken up into readable 'chunks'. In reports, sub headings are used to label each 'chunk', whilst traditional essays would use paragraphs to the same end.

➢ Usually only **one key point or main idea** will be found in any single report section or essay paragraph.

➢ Both would have a particular readership in mind and would therefore use language appropriate for that readership; or language that conformed to accepted conventions of writing for a particular organisation or institution. The best essays and reports are written in a simple, direct and unpretentious way.

Differences

• Reports can be presented orally, but essays are usually submitted in written form only for marking purposes (*although an essay may be read aloud occasionally, e.g. at an academic conference, to share ideas with peers*).

• Essays can explore hypothetical situations – but reports are almost always concerned with actual past events (*although they may offer recommendations for future action, based on an analysis of past events*).

• Essays are usually written in the 'third person', i.e. as if detached from the subject. Reports can adopt either the first person or third person (detached) style), depending on the context. However, for reports produced for academic course work, many tutors prefer or stipulate you write in the detached third-person style; **check with your tutor.**

• Reports can selectively include illustrations, charts, diagrams in the main text, but in traditional essays these would be usually be included as appendices (*extracts from charts etc can be included, very selectively, in the main e text of traditional essays – **although you should seek advice from your tutor on this point**).*

• Bullet points can be used in reports, but these are **not common** in traditional essays (*unless a tutor gives his or her permission for you to do this*).

• Reports can include a '*Recommendations for Action'* section, but this would be **very unusual** in an essay.

Why reports 'fail to connect' with their intended readership

| Information Source (Communicator) | → | **Blocks to message** | Receiver |

Blocks to message

- The overall point or 'message' of the report is unclear

- The report is badly structured: there is no logical and sequential progression of ideas

- The report is **too long:** doesn't get to the main points quickly enough

- The **words used are inappropriate** for the intended readership or audience

- The report is **boring** and does not engage the reader

- The report is full of spelling mistakes and grammatical errors

The big black hole that bad reports are bounced into

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Words, words, words

Bad reports are often written in ways that that obscure their message. Look at the following sentence (taken from a report).

"Although solitary under normal prevailing circumstances, racoons may congregate simultaneously in certain situations of artificially enhanced nutrient resource availability."

Did you struggle to make sense of the sentence? Yes? Don't worry, so did we!

What the writer was trying to say (in a very complicated way) is that racoons are solitary animals but will group together if food is left for them!

Some students feel they have to write in a complicated way because they **are** at university. **Not true!**

Writing style

When writing:

- ✓ be simple and concise

- ✓ make sure of the meaning of every word

- ✓ don't fill your report with unnecessary detail:

For example, *don't* write:	When you could write:
It was decided, after much discussion and negotiation, spanning three hours and involving all the group members, that we would present the report using available visual aids.	*The group decided that we would use PowerPoint to present our report.*

- ✓ Use everyday words when possible. You will need to use some technical terms, particularly when describing or analysing theories or models, but this doesn't mean you need to adopt an archaic or jargon-filled style of writing.

✓ Vary the length of your sentences. Aim for one clear point in each sentence.

'Brevity' - Memo to the War Cabinet, from Winston Churchill, 9 August 1940

"*To do our work, we all have to read a mass of papers. Nearly all of them are far too long. This wastes time, while energy has to be spent in looking for the essential points.*

I ask my colleagues and their staff to see to it that their reports are shorter.
The aim should be reports which set out the main points in a series of short, crisp paragraphs.

If a report relies on detailed analysis of some complicated factors, or on statistics, these should be set out in an appendix.

Often the occasion is best met by submitting not a full-dress report, but an aide-memoire consisting of headings only, which can be expanded orally if needed.

Let us have an end of such phrases as these:

'It is also of importance to bear in mind the following considerations', or 'consideration should be given to the possibility of carrying into effect'. Most of these woolly phrases are mere padding, which can be left out altogether, or replaced by a single word. Let us not shrink from using the short expressive phrase, even if it is conversational.

Reports drawn up on the lines I propose may first seem rough as compared with the flat surface of 'officialese' jargon".

But the saving in time will be great, while the discipline of setting out the real points concisely will prove an aid to clearer thinking.'

Churchill was referring specifically to reports written for discussion at meetings. But much of what he said is also relevant for report writing for assignment purposes, particularly the advice to write in a concise way free of 'woolly phrases'. The advice about appendices is also relevant to academic reports. Good advice is ageless!

An effective report

- The key to writing an effective report is in designing the skeletal framework or structure for it.

- Sub-headings will provide you with signposts for the preparation of the report and help your reader to understand easily and quickly its contents.

- The information presented in the report should gradually develop and **cascade** from one section to the next, so that the report grows in power and force of argument to its conclusion.

A five-stage structure to report writing

A good report is like telling a good story. In a report you are telling the reader what happened, why it happened and in a way that holds their interest. Like any good story, you would also set the scene first, making the reader aware of, for example, the history, background and overall context of the report topic.

The contents of any written report should be organised into a well-structured form. Unless it is a short, e.g. one page, it will be usually be necessary to divide the information contained into sections, each section with its own sub-heading.

You should choose sub-headings that are **appropriate for the report**. You will see from the two example reports that follow that sub-headings are chosen that signal what is to come in any particular section.

Most reports will contain a five-stage structure, which present five broad areas and sections 2 – 5 are likely to have sub-sections (each with relevant sub-headings). The five broad areas are:

1. Introduction
2. Background Information
3. Development
4. Discussion
5. Conclusion

1. Introduction

In the introduction you can introduce the aim and subject of the report. You can tell the reader what to expect: what issue is being explored or evaluated, and if necessary, why.

It is often helpful to summarize very briefly the main finding of the report at this point, as this can stimulate the interest of the reader. Grab and keep the attention of the reader in your report.

2. Background information/context

In this area you would present an overview of the historic, economic, political or social influences and/or the micro factors that enable the reader to put the report issues (see below) into context or perspective.

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3. Development

In this broad area of the report, you would outline key issues, ideas, and practices etc. that are the main focus of the report. You might also present relevant data or information to help build a picture for the reading of what has happened. You might include, for example, the ways a particular model is currently applied (see example report 1), or the way a particular scheme developed (see example report 2).

4. Discussion

The discussion section is the heart of the report – and usually is the most important in terms of the mark you receive! This is where you present your analysis of the issues presented earlier in the report. This is where you **interpret, explain and discuss** the issues you outlined. In an academic report this is often done by reference to relevant theories, models and practices.

5. Conclusions or summary or recommendations

This section should bring the report to a close by pulling together the main points emerging from the report and by giving a relatively brief resume of the main or overall conclusions or recommendations reached.

Some additional points:

Contents page	Appendix/appendices

In a lengthy report you would normally include a Contents Page, which would include main chapter headings, any sub-divisions within these and page numbers.
These chapter headings can be numbered and given numerical sub-divisions, e.g.
 	
1. Introduction
 	
2. Organisation Background
    2.1   History
    2.2   Geographical features
    2.3   Current networks
    2.4   Structure of organisation
 	
3. Current Challenges Facing Organisation:
    3.1   Competition
	The Appendix is the place for lengthy and detailed material that would interfere with the easy flow of reading in the main report. They may well contain the key information that you refer to in your report – but the main body of the report should be used to **summarise this key information**.
	
	The appendix items are there for readers to look at if they wish, particularly if they wanted to check the accuracy and validity of your report discussion or conclusions.
	
	The appendix would, for example, contain detailed statistical data, computer programs, examples of questionnaires used in any research project.

3.2 Changes in Market 3.3 Technological Changes etc… The headings and sub-headings can also be linked to page numbers to assist a reader to quickly find a particular section of the report.	Appendices should be used sparingly – and not included as device to avoid the word count limits of an assignment! In fact, appendices can be added to the word count by a module coordinator if the co-ordinator believes they are included simply to avoid the word limit.
References In a report written for academic purposes, you would normally cite evidence throughout the report and provide a full list of references, using the **Harvard System** of referencing, which is the system adopted by the School of Management, and most other Schools of Management in the UK (see the Effective Learning Service booklet '*References and Bibliographies*').	**Abstract or summary** In longer reports it is common to have an abstract or summary page. This is a brief summary of the project, research, experiment etc. and the results or conclusions reached. An abstract or summary would normally be no more than a page in length. Check with your tutor to see if you need to include this with your report. It would not normally be included in short reports, but would be expected in dissertation project reports for Masters level courses.

Examples of reports

Two example reports are shown to demonstrate the correct use of sub-headings, good structure, clear language and accurate referencing. These reports are used with the permission of the students concerned.

Example 1: topic: *the business balanced scorecard measurement system* (1750 words).

1. Introduction

This report looks at the use of the Business Balanced Scorecard as a measurement system, how organisations have adopted the original concept and how the principles behind the original idea continue to drive thinking to develop methodologies to measure the successful delivery of business strategy.

The original idea emerged from research undertaken by Robert Kaplan and David Norton at Harvard Business School and soon established itself both in America and Europe. It developed into a very popular process and became linked to a number of other business initiatives, e.g. Total Quality Management as its versatility became clear.

However of more importance than the actual idea were the principles underpinning the system. These were the key to the success of the concept, and although the pure idea from Kaplan and Norton has been developed and built upon over the years, these principles remain today as critical elements in successfully implementing business strategy.

The report is based on a mix of academic research and from examples of how the system has been adopted by a number of organisations, from which we are able to draw the final conclusions.

2. Background to the business balanced scorecard

In 1992, Robert Kaplan and David Norton introduced the business community to the concept of a Business Balanced Scorecard, following a research project involving twelve successful American companies who required a 'more broadly based measurement system, encompassing financial and non-financial objectives'. However, as Kaplan and Norton identified subsequently, what was actually developed through their work was not a measurement system but a total framework for strategic management of the business – one that would yield real and measurable financial and operational success when fully integrated within the business infrastructure and processes.

The Balanced Scorecard system looks at business performance across four perspectives:

1. **Financial** – Growth, profitability and risk from the perspective of the shareholders
2. **Customer** – Creating value and differentiation from the customer perspective
3. **Internal Process** – Business processes that create customer and shareholder satisfaction
4. **Learning and Innovation** – Organisational change, innovation and growth

The scorecard works through the development of measures within each quadrant that are interlinked and aligned directly to the business strategy. These measures can then be cascaded throughout the business in order that everyone has a 'line of sight' to the strategy, in how they are personally measured.

As we can see below the four perspectives provide the focus of the measurement system with the company's strategy at the heart of the process:

An interesting innovation within the process is the use of measures that provide a future perspective on performance - 'leading indicators' as opposed to the more traditional look at performance through 'lagging measures' which focus on what has gone on before.

Kaplan and Norton see the Scorecard as filling a void that exists in most management systems – the lack of a systematic process to implement and obtain feedback about strategy.   Based on the realisation that 'what gets measured gets

done', by establishing clear linkages between measurement of performance and company strategy, a much better chance of the strategy being successfully embedded was created.

However, it is important that organisations don't just focus on the measures but on the vision and strategy that drives the measures, and how this can be converted into actions to produce a successful implementation of the strategy. Kaplan and Norton identified five principles, built around the Balanced Scorecard system that allow companies to execute their strategies:

Principle	Definition
Mobilise change through executive leadership	Any 'Balanced Scorecard' project must be seen as programme of change, driven like any successful change programme from the Executive leadership team. This team are also responsible for the engagement of all of the key stakeholders in the process, both inside and outside the company to ensure they are able to contribute and support the concept.
Translate the strategy into operational terms	The four perspectives of the scorecard help executives better understand the strategies and allow these to be articulated into clear areas of performance from which everyone can understand what is required.
Align the organisation to the strategy	The balanced scorecard helps to define the strategic linkages that integrate the performance of units within the organisation to the overall strategic objectives. Measures throughout the business should align with the corporate measures, either adding to the corporate measure or influencing the performance of the business unit towards the corporate goal.
Make strategy everyone's everyday job	Kaplan and Norton described this as top down communication and bottom up implementation. Three processes were identified to achieve this: • Use communication and education to create awareness. • Align personal objectives with strategy. • Link compensation to the scorecard.
Make strategy a continual process	Traditionally setting strategy was seen at best as an annual event but strategy formulation, testing and revision should become a continual process with processes in place to allow this to happen.

From these principles, it is clear that Kaplan and Norton created a robust and critical management process, which extends far beyond a simple measurement system.

3. Deployment of the business balanced scorecard

As part of the developmental research, a number of American companies were engaged in developing the Balanced Scorecard concept, namely Mobil North American Marketing and Refining, Cigna Property and Casualty Insurance, Brown and Root Engineering Services and Chemical (Chase) Bank. Within two years of embedding the management process, each reported the achievement of 'breakthrough' performance, thus proving the value of the concept.

Not unsurprisingly the number of companies employing the Business Scorecard grew and in the UK a number of big companies implemented the system, including the Halifax Building Society (now known as HBOS).

The Halifax decided to implement the process in its main business channel, the retail network in 1994, following a visit to Harvard Business School by the Retail Business Director.

It took nearly two years to develop and implement the concept, which followed the five principles outlined by Kaplan and Norton above. Much of this time was spent on understanding the strategic objectives of the business and the creation of new measures to ensure these could be measured across the four quadrants of the scorecard.

In particular the biggest challenge proved to be the development of leading measures within the Customer and Innovation & Learning quadrants, areas where little focus had been in the past. The work also generated a number of offshoot initiatives looking at customer service, branch efficiency and the introduction of best practice as a whole new area of business focus emerged on the 'customer' and the capabilities of the employees.

What was interesting was that the Halifax used an approach seen frequently in the UK, of implementing the Business Balanced Scorecard in a specific business unit rather than across the whole business as originally advocated. The 'corporate' level Balanced Scorecard, followed five years later.

More recently within the UK we have seen the Balanced Scorecard developed for use in the public sector. One such example is the Environment Agency, who have developed a balanced set of measures to support their five-year corporate plan.

Companies have also adopted the Business Balanced Scorecard to support quality initiatives like Total Quality Management and the adoption of the European Foundation for Quality Management model. The successful integration of these quality initiatives along with the implementation of any major change programme depends on the ability to measure accurately the performance of the business and the Balanced Scorecard with its development linked so closely to the strategy of the business is ideal in supporting the imbedding of these initiatives within the business.

4. Developments on the original concept

Since 1992, the original idea has evolved as organisations have developed their own way of implementing the system, although the original principles remain as appropriate now as they did then. Examples of how things have changed include:

- The use of five perspectives rather than four, for example by ABB Sweden (a global electrical engineering company) who have added an employee perspective, in addition to the learning & innovation perspective.

- A Value Performance Scorecard designed to better compliment the European Foundation of Quality Management model, measuring performance across the following quadrants – Financial (business results), Employee (people satisfaction), Societal (impact on society) and Customer (customer satisfaction).

- The concept of a Total Performance Scorecard (TPS) developed by Rampersad (2003) which merges five major business initiatives together into one concept – a personal Balanced Scorecard, the organisational Balanced Scorecard, Total Quality Management, performance and competence management and 'Kolb's' Learning Cycle. By merging these together 'a systematic process of continuous, gradual and routine improvement, development, and learning that is focused on a sustainable increase of personal and organisational performance' is created.

- The development of 'standalone scorecards', which focus on one particular unit of organisational performance, without the overarching corporate scorecard (similar to the Halifax system).

- Ownership and development of Scorecard 'quadrants' being separated out to specific directors within the business, e.g. the customer quadrant to the Marketing Director, who is then given responsibility for the quality of the customer interaction and develops the measures required independently to other key measures across the business, although remaining within the strategic framework established.

- The term 'Scorecard' becoming synonymous with the presentation of management information in order to inform senior management on how well the organisation is performing.

5. Conclusions

Kaplan and Norton inspired a radical approach to business performance measurement, identifying the benefits of organisations developing a process that looks across a number of perspectives, as well as developing measures that predict future opportunities rather than just looking at what as gone on before.

Not surprisingly, as organisations became comfortable with the original idea, it has been developed to expand its capabilities. Meanwhile the original format remains a very attractive proposition to many organisations, and continues to be implemented

as a way of improving business performance and implementing strategy. In particular, the five principles identified by Kaplan and Norton are still seen as vital in driving successful strategic change as the 'market place' increases in complexity.

The original idea was driven be a realisation that companies needed to harness, manage and grow the intangible assets within their midst as well as maintaining a clear focus on pure financial performance.

The Business Balanced Scorecard allowed organisations to track the financials whilst simultaneously monitoring progress in building the capabilities and acquiring the intangible assets necessary for future success.

(1723 words)

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Mullins, L. J. (2002) *Management and Organisational Behaviour* 6th Edition. Italy: FT Prentice Hall.

Oakland, J. (2001) *Total Quality Management – text with cases* 2nd Edition. Oxford: Butterworth-Heinemann.

Rampersad H. K. (2003) *Total Performance Scorecard – Redefining Management to Achieve Performance with Integrity.* USA, New York: Butterworth-Heinemann.

This report demonstrates use of sub-headings, bullet points and a summary of the principles presented in a table form. The report also demonstrates the five-point structure approach to report writing outlined on page 7. There is a clear **introduction** and **conclusion**, a **background information section**: what the Business Balanced Scorecard (BBS) is; when introduced etc; **a section that presents the main issues**: deployment of the BBS & extent of current use; and **a main discussion section**: that looks at the development of the BBS.

The language is clear and direct and the student presents a combined 'References and Bibliography' list that refer both to citations in the report (the **references**) and other sources, not directly cited, that have influenced the shape and direction of the report (the **bibliography**).

The report is written in the third person. This tends to be the norm in assignments presented for academic purposes, unless the tutor invites you to reflect on your own personal experiences or indicates his or her flexibility in this matter.

Example 2

Case studies often feature on undergraduate and postgraduate courses. Students are usually asked to read a case study and to answer set questions on it. In this case, the student was asked to summarise in report from the failure of a mentoring scheme in an engineering company.

Case study report: failure of a mentoring scheme at 'engineering uk' (1500 words).

Introduction

The aim of this report of the '*Let the Actions Match the Words: Engineering UK'* case study (Garvey 1999) is to summarise the key elements that led to the 'withering death' of a mentoring scheme introduced by 'Engineering UK'. Although 'Engineering UK' is an actual company and supplied all the background information for the case study, at their request all company names have been changed.

Background

Engineering UK is a satellite company, part of a multi-national engineering network. Engineering (worldwide) that operates in a highly competitive international market. This competition issue became a major consideration when one competitor made a head-on assault on their customer base. Engineering (worldwide) responded by making an appeal to the workforce to meet the challenge of competition. This was largely achieved within a 30-month period and as a result, Engineering (worldwide) held its customer base. In order to continue this dramatic success, Engineering (worldwide) created a new corporate 'customer led' strategy that senior management hoped would enable them to maintain and quickly develop further the company's world market position.

The New Strategy

The communication of this strategy to the satellite companies involved a great number of slogans, for example, 'continuous improvement', 'benchmarking', 'learning organisation', 'common approach', 'we're in it for the long haul' etc. There were also numerous manuals, texts and presentations issued by the parent company. The content of these directives emphasised the importance of quickly gaining the commitment of the whole workforce and changing the culture to one more responsive and customer oriented. A major training and development programme was established by the parent company to support the strategy. The programme was aimed at the whole workforce, but there was a clear primary focus of attention on first line supervisors and their team members. At the heart of the development programme the company established a mentor scheme to support the development of participating individuals. Through this approach of working to a common agenda, Engineering (worldwide) anticipated that all the satellite companies would develop in the same direction and emerge with a shared philosophy.

Engineering UK

Engineering UK had experienced a history of industrial unrest at the time of this initiative. Although by increased efforts it had successfully headed-off the competition, it had also just reduced the size of the workforce by redundancies, due to increased use of high technology. This created the classic fears in the workforce of, 'if we work hard and commission these new machines, we lose our jobs and if we lose our jobs, we become de-skilled'. There was also some resentment among the workforce for a lack of sensitivity of management in making people redundant immediately following all the efforts of the workforce to make the company more efficient. The management of Engineering UK was also characterized by a strong 'command and control' culture and was characterised by some observers as a 'macho-management' style.

Mentoring Scheme

The Engineering UK training manager was given the responsibility for introducing a mentoring scheme to the company, which was expected to address the deskilling issue by seeking areas for individual skill development. With fewer people and more technology, the company needed all individuals to be more effective and adaptable at work. The mentoring scheme was expected to help facilitate flexible working and enhance individual performance. Mentoring involves one person (the mentor) supporting another (the mentee) with his or her career or personal development. It should provide a safe environment for both parties to meet, talk in confidence, and for the mentee to set the agenda for discussion on topics relating to his or her personal or career development. It is, or should be, an opportunity for two people to meet as equals, regardless of company rank, and for both to gain from the encounter in their own respective ways.

As noted earlier, there was a strong command and control management structure in the company. However, the training manager envisaged that mentoring would help begin to change this culture and empower the workforce by giving real authority to both the mentor and mentee (known in this company as 'the client'). It would help to create and maintain the 'continuous improvement' process by creating a new learning culture', where opportunities for development would be encouraged. Senior management in the company, recognising the threat from competition and the general directive from Engineering (worldwide) on a need for change, gave their general support to the training manager.

The Mentoring Scheme in Action

The training manager use Kram's (1985) four stage model for introducing the scheme to the company, including defining and communicating to key people involved what mentoring was expected to achieve.

In selecting suitable mentors, the training manager identified the following personal traits as important:

➢ **Supportive** (of the changes in the organisation)
➢ **Status** (position in company) – usually workers who were at senior level to the client, but not a client's direct manager.
➢ **Influence** (usually meaning experienced in the company & knew the networks & politics of the company)
➢ **Secure** (established in their career)
➢ **Time** (willing to put in the time to the scheme)
➢ **Leadership skills** (of motivating, listening, supporting or challenging others)

The training manager began to seek potential mentors for the mentees ('clients') and sent out a list of character attributes and skill criteria to plant managers and asked them to nominate supervisory level staff to be mentors to subordinate colleagues, including staff at other factories up to 300 miles away. Once this was done, mentors were paired with clients on the basis of a controlled choice: the client could choose his/her mentor, but this had to be agreed with the line manager, plant manager, training manager and mentor. The mentor nominees attended a day and a half training programme to learn the principles of the scheme and to understand their role.

Mentors at Engineering UK were asked to support their mentees with issues relating to skill and career development. They were not briefed to control events, but to act as independent counsellors and guides for their mentees. The mentees were largely junior staff, and it was also intended as a part of an induction programme for new recruits. Mentor skills were not addressed specifically on the training programme, as it was assumed that nominee mentors already had the skills necessary by virtue of their experience and the criteria established by the training manager. The focus of training was in explaining the principles of mentoring and the reasons for its introduction.

Why the Mentoring Scheme Failed

The mentoring scheme experienced, what was described by the training manager as, a 'withering death'. There were three main reasons why the mentoring scheme at Engineering UK failed.

Firstly, the parent company, Engineering (worldwide) needed to make internal change happen quickly. However, there was a conflict here, as mentor development cannot be hurried (Kram 1985). There was a significant residue of cynicism and resentment among the workforce at Engineering UK to overcome following the redundancies that occurred. Mentoring relationships take time to establish; they also need trust between participants, which was lacking in the firm. The Training Officer, whilst identifying suitable personal traits for potential mentors had to rely on colleagues to match these with staff.

Secondly, a 'macho' or autocratic culture within Engineering UK undermined the values implicit in mentoring: which is based on equal partnerships between people who were in unequal positions within the firm. This led many of the mentors to adopt their normal posture of 'command and control' with their subordinate mentors. This led to many giving advice to mentees, rather than entering into a dialogue with them. This made nonsense of the term 'client' used to describe the mentor to mentee

17

relationship! The situation was further aggravated by the physical distance between mentors and mentees, which, as noted earlier, included partnership between colleagues hundreds of miles apart.

Thirdly, the lack of mentoring skills shown by mentors was clearly a major factor in the downfall of the scheme, but this connected with the rush to implement the scheme and subsequent inadequate period of training assigned for this purpose. Mentoring skills was not addressed and the day and a half spent on developing the essential understanding of mentoring was clearly inadequate; there was too much for the mentors to understand and change in too short a period. Significant attitudinal change was needed throughout the company – and this was hardly likely to occur in just one and a half days of training.

Conclusion

The expectation of the mentoring scheme within the company as a whole was too great, and did not take into account the variations in company cultures among the satellite companies. In particular, at Engineering UK, there were too many raw wounds from the recent redundancies that needed to be attended to before mentoring had any chance to succeed. Furthermore, the hierarchical structures within this company acted as a barrier to the changes envisaged from mentoring. The 'words of change' were in place, but these had not yet begun to impact on the values and attitudes of existing staff.

(1502 words)

References:

Garvey, B. (1999) 'Let the Actions Match the Words: Engineering UK', in D.Megginson & D. Clutterbuck (eds.) *Mentoring In Action: a practical Guide for managers,* London: Kogan Page.

Kram, K E. (1985). *Mentoring at work: Developmental Relationships in Organizational Life,* Glenview, IL: Foresman.

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It is wise to write a case study report as if the tutors, or other readers, were unfamiliar with the case – and your task is to explain it clearly to them.

The student adopts the five-point structure approach to report writing (see page 7). There is an introduction, background information, issues presented (what happened) and a discussion on why the scheme failed. Finally, there is a conclusion that summarises the main reasons for the early demise of the mentoring scheme.

Again, this report is written in a clear, direct way and in the third person. The student does not overdo the use of bullet points and has concentrated on presenting the main issues in a well-structured way. The sub-headings 'signal' to the reader what each section is about.

Referencing

Using references in essays is the way to avoid accusations of plagiarism and is expected of students in higher education. It helps tutors and other readers to locate sources you refer to so they can pursue for themselves the ideas or practices you mention.

The School of Management requires students to use the **Harvard System.** This involves citing the **source,** e.g. the author, as you write.

Citing the **source** as you write involves giving a partial or shortened reference (last name of author(s) and year of publication) in the main body of your written assignment and then giving full details of the source in full at the end of the assignment in a 'References' section.

Example: **Citations**

Although *Handy* (1994) has argued that education is the key to economic success for individuals, organisations and nations, a majority of adults in the UK have yet to be convinced or persuaded of this argument. In 1999 only forty per cent of adults had participated in any sort of formal learning in the previous three years. Of these, a significant majority was from social class groups A, B and C. Only a quarter of adults from semi-skilled or unskilled work backgrounds had involved themselves in formal education (*Tuckett* 1999). The consequences for people without qualifications who lose their jobs are often serious. A study of long-term unemployed people in Yorkshire found that sixty-one per cent had no educational qualifications, and a significant number of these had special learning needs. (*Y&HES 1998*). There would appear to be a link too, between lack of qualifications, poor health and a disengagement from participation in political or civic life, and could aggravate the situation of unemployment for the people concerned (*Hagen* 2002).

At the end of the assignment the references are given in alphabetical order, by last name of the author(s), **in full:**

References

Hagen, J. (2002) *Basic Skills for Adults,* Birmingham: The Guidance Council.
Handy, C. (1994) *The Empty Raincoat,* London: Hutchinson.
Tuckett, A. (1999) 'Who's Learning What?*' The Guardian* 18/5/1999, p. 13, Manchester: Observer Group Newspapers.
(Y&HES) Yorkshire and Humber Employment Service (1998) *Survey of Clients Aged 25+ Unemployed for Two Years or More,* London: Department for Education and Employment.

For full details of how to cite and reference, you can obtain a copy of 'References and Bibliographies' from the Effective Learning Service.

Further reading

These are all the titles in booklets in the 'Effective Learning' series:

1. *Return to Part-time Study*
2. *Return to Full-time Study*
3. *The First Semester*
4. *Time Management*
5. *Accelerated Learning*
6. *20 Tips for Effective Learning*
7. *Six Steps to Effective Reading*
8. *Effective Note Making*
9. *Effective Writing*
10. *Essay Writing (1) stages of essay writing*
11. *Essay Writing (2) planning and structuring your essays*
12. *Essay Writing (3) finding your own voice in essays*
13. *Essay writing (4) ten ways to liven your essays*
14. *References and Bibliographies*
15. *Report Writing*
16. *Pass Your Exams*
17. *Your Assignment Results – and how to improve them*
18. *Presentations*
19. *Group Work*
20. *Introduction to Research and Research Methods*
21. *Foundations of Good Research*
22. *Writing Your Management Project Report or Dissertation*

You can download any of these from the School of Management Homepages:
Resources– Effective Learning link, or contact the Effective Learning Service, tel.
4414 (internal), Email: C.Neville@Bradford.ac.uk, or visit room 0.10 Airedale Building
at the School of Management.

In the School of Management and J.B. Priestley libraries, there is a study skills
section at **D.371.30281**

Recommended reading

Bowden, J. (2004) *Writing a Report: how to prepare, write and present effective
reports, 7th edition,* Oxford: HowToBooks.

Other useful general study skills guides:

Cottrell, S. (2003) ***The Study Skills Handbook***, London: Palgrave.

*(This book Contains lots of bite-sized chunks of advice and information presented in
a lively and visually interesting way. This is an excellent general study skills guide for
all undergraduate or postgraduate students).*

Giles, K. and Hedge, N. (1998) ***The Manager's Good Study Guide,*** Milton Keynes: Open University Press*. (This is a study skills* guide w*ritten for business studies students and contains advice and information presented in a clear, readable and subject-specific way*).