

Planning and writing guide

The aim of this guide is to provide some suggestions on ways of planning and writing your outputs. It is tempting to get started without thinking about all the possible angles, but some pre-planning and reflection will help you to think through the wider implications. The suggestions here apply equally to smaller unrelated outputs (or mini projects) as they do to larger projects. We know that if you pre-plan your work by filtering your ideas at the outset, it is easier to align your outputs with both personal and organizational learning objectives. This should enable you to secure the best possible return on your time and effort.

The essence of action learning is to start with questions: What are the selection criteria and key success factors for my project? How will I start and how will I use the findings? If you can answer these questions, you should be able to appraise how well you planned, implemented and evaluated each output. A project outline proforma is included on page 3 to assist you to capture your pre-planning effort.

When you have done the planning, you will need to research and write your project and section 2 covers some of the key points to consider when writing your project. Among others, it suggests ways of using reports, articles and other data and how to structure and write-up your work.

Section 1: Planning your project

How do you ensure that you have selected the right project to work on in the first place? Here are two questions (with accompanying tables) that might help you to filter your ideas and refine your thinking and planning: (1) How do I make a difference? and (2) How do I go from idea to project?

How do I make a difference?

Dissatisfaction	What issues need to be addressed by my part of the organization?
Vision	What should the purpose of my overall change effort be?
First steps	What people need to be involved? How might they include the outcomes of my project? What information, methods, processes and approaches are needed?

How do I go from idea to project?

Task	Situation	
	Familiar	Unfamiliar
Familiar	A Do a project in an area I know well?	B Do a familiar project but apply it to a new situation?
Unfamiliar	C Do an unfamiliar project but in a familiar work situation?	D Do a project elsewhere in the organization & work on a new task?

Identifying the key success factors

As a next step, you might consider the key success factors for each idea so that you can select and work on challenges that align your own learning objectives with organizational benefits.

Try using the following steps to refine your ideas:

(1) Establish the conditions for successful project completion

There should be:

- Discussion with the project champion or sponsor to ensure that he/she shares your project objectives.
- Regular communication with the project sponsor.
- A time requirement for the project with a time allocation for each specific stage.
- A strong interest in the major issue or problem to be tackled.
- Freedom to approach the project in the way best suited to the learner.
- As clearly defined as possible.

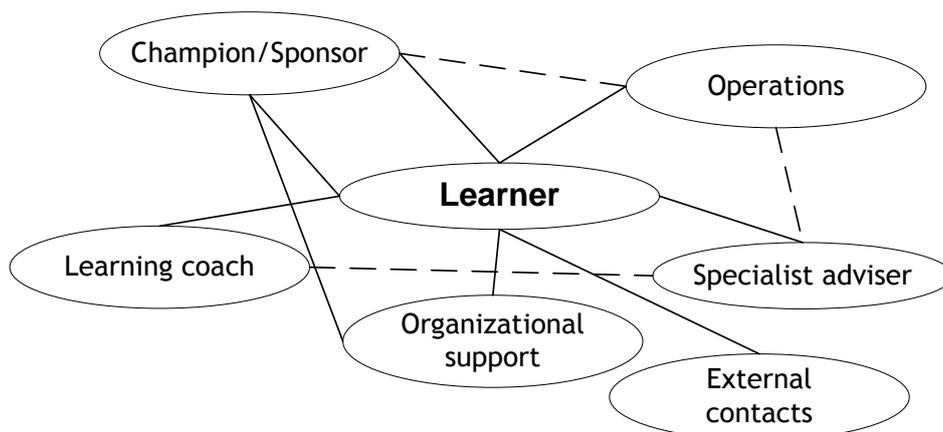
(2) Apply key success criteria to the choice of a project

The project should be:

- Sufficiently testing for the learner to emerge as a stronger, more confident practitioner.
- Sufficiently challenging to provide a better understand of the organization in which you work.
- Implementable.

(3) Create a web of support for the project

Who do I need to include in my web of support?



(4) Integrate action and learning

Identify some specific learning outcomes. For example:

- The acquisition of new skills, knowledge and behaviours.
- Personal growth in managing conflict and ambiguity.
- A deeper understanding of organizational issues.
- What else?

(5) Specify the personal benefits

What do you want to accomplish in terms of:

- Personal development
- Professional and career development

(6) Specify the organizational benefits

How will the project be of benefit to my organization in the short / medium / long term?

Project outline proforma

Starting points:

- (1) Frame a personal learning plan (linked to your career review).
- (2) Select an appropriate learning coach (someone you can learn from)
- (3) Link your personal learning plan to a starting point project outline (see below).

Please capture a concise project outline (one side of typescript) using the following headings. Provide the facilitator with a copy prior to the close of the start-up meeting.

Name:

Job role:

Email address:

Own project (working title):

Sub group theme (if appropriate):

Sub group members (if appropriate):

Learning coach:

Specialist adviser(s):

Personal learning statement:

[Personal and professional reasons for undertaking the project, linked to a personal plan for learning that connects the career review and your anticipated personal learning outcomes.]

Purpose (or objectives) of the project:

[Example: To maximize team member satisfaction and thereby guest and owner satisfaction so as to: Increase profitability; Improve the work environment (via better teamworking, enhanced ownership and contribution); Improve employee retention and guest loyalty.]

Expected outcomes (or benefits) are:

[Example: Strategies to maintain high service standards among team members; Enhanced customer focus; A more unified vision; A partnership for progress; More opportunities for expansion and better linkages with industry partners; A deeper understanding of cultural barriers.]

Key questions are:

[Example: What constitutes excellent customer service? How is it defined? What enables one organization to stand out from another? How do cultural and class differences affect customer service? How might 'wow' experiences for guests be generated and sustained? Is this a culturally-based phenomenon? Is it class related? Can we train for 'wow' results? Are people born with the ability to generate 'wow' service? Who benefits and why should we strive for added value service? What is in it for me (understanding, insight etc.)?]

Next steps are:

[Example: Devise a practical plan of action (with chronological steps); Set-up communications network (contacts, meeting times, dates); Meet with learning coach and outline coaching role, role of own work team, reaffirm commitment and set-up meeting dates; Specialist adviser(s) – meet and reaffirm commitment; Own network – establish links for on-going learners; Plan time allocation – schedule activities and integrate with own work and discretionary time; Advise other stakeholders – outline project and plan for the coming year, gain support; Advise immediate family – explain time adjustments needed to achieve personal goals].

In summary: To optimize the use of available time and resources, a plan might help you to incorporate:

- The reasons for undertaking the output, resource implications, methods, deliverables.
- A simple flow diagram with interrelationships between the work plan, prior work and any key themes.
- A time allocation chart to identify, describe and schedule the activities that will have to be completed.
- A summary statement (or abstract) essentially your starting point – re: personal and workplace goals.

Section 2: Writing your project

Almost all outputs require written preparation so that you can provide: A written record of your insights, findings and recommendations; Objective evidence of what you have discovered for the purposes of internal and external review and knowledge-based solutions that you can share with others as you refine and implement your work.

The act of writing will also help you to develop your intellectual skills and your ability to reflect and present a report that is well researched and supported by a variety of data sources. This section suggests ways of: (1) Refining your topic; (2) Reviewing the literature; (3) Preparing to write and (4) Writing up your report. Appendix 1: 'Structuring and referencing your work' provides guidelines on layout and on how to cite your references.

(1) Refining your topic

The nature of your work will influence the shape and format of your output report. Key influences include:

- Your learning objectives: what topics could be useful/interesting to your job? Could you use this time to really get to grips with a long-standing problem? How might you enhance your skills in the process?
- Personal interests: Does the topic have sufficient personal appeal to hold your interest?
- Organizational interests: What topics would be useful to the organization re: current imperatives?
- Your data: How much literature/information/data is available on this topic?
- Scope: Is the topic too big or broad? Would it be better to select a smaller topic or set a narrower focus – perhaps a sub-set of a larger problem - and to do it well?

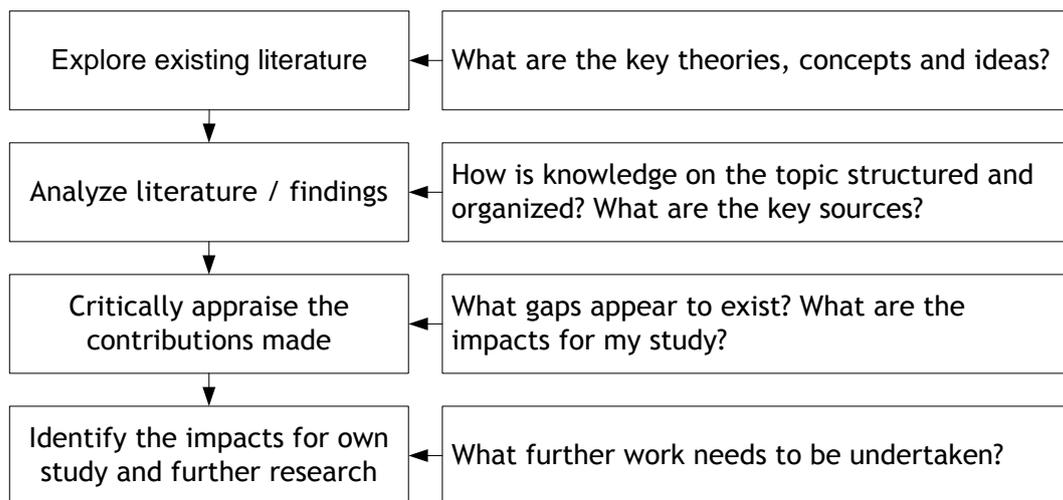
You might consider talking over your ideas with: Your learning coach and work colleagues; fellow group members; the facilitator; past learners; partners or friends.

It is a good discipline to prepare for such conversations by writing some concise notes on your: Topic title: Do you have a concise description? Aims: what would you like to achieve? Anticipated outcomes: what are the ideal outcomes and how will they be measured? Approach: how will you go about researching this topic? Would a diagram help to explain your approach? Where will you look and what research methods might be appropriate to shed more light on the topic? Champion or sponsor: is there some person or persons in the organization who has expert knowledge of the topic or who may be most affected by the outcomes?

(2) Reviewing the literature

Now that you have clearly identified the scope of your output and the factors that will influence its successful implementation, the next step is to uncover relevant prior work by undertaking a literature search. The key objective of the literature review is to provide a clear, balanced picture of relevant concepts, theories and data relevant to the topic. Assuming that with guidance from learning coach / specialist adviser(s), you have identified suitable information sources, the next question is: how do I draw meaning from the literature and interpret findings that are relevant to my study? Try to stay open to all the possibilities by using questions to review the literature.

Using questions to review the literature



How do I prepare a literature review?

Do it one paper at a time; keep copies of every document; read what you collect; interact with the literature with a pen and highlighter. If you do these things the review will (almost) write itself.

1:	Why this topic?	Why is this an important topic?
2:	What is known about this topic?	What is unknown? (chance to speculate?)
3:	Why should the gaps be filled?	Which gaps can you fill and why?
4:	How will you fill the gaps?	

Some tips on how to review literature sources:

1:	One step at a time	Remember that literature is data
2:	Always keep copies of every document	Always get the full citation details
3:	Always read the documents you collect	Read all the important documents twice
4:	Read every document with a pen and a highlighter	

(3) Preparing to write

In order to stay on track, try to clarify your thinking and preparation work before you start drafting your output, by making notes on the following questions:

- (1) Who are the intended readers? - list 3 to 5 of them by name;
- (2) What did you do? (limit - 50 words)
- (3) Why did you do it? (limit - 50 words)
- (4) What happened? (limit - 50 words)
- (5) What do the results mean in theory? (limit - 50 words)
- (6) What do the results mean in practice? (limit - 50 words)
- (7) What is the key benefit for your readers? (limit - 25 words).
- (8) What remains unresolved? (limit - 50 words).

Mindmapping is a useful technique that can be used to assist in assembling the information that could go into your output and to help you decide its size and shape...The most important thing in creating a mindmap is to keep your pen writing – don't let it leave the page until you have finished!

Some prompts for mindmaps:

1	What is the key data?	Where does it lead?
2:	What are the gaps in the data/literature?	What remains unasked?
3:	Who else has done similar work?	Do they agree/disagree with each other/you?
4:	What other fields does your work touch?	What connections might this suggest?
5:	What theories are relevant to the work?	Are there any conflicts with those theories?
6:	How is your work likely to change things?	How will these practical changes come about?
7:	What contribution might you make?	What questions are raised for you personally?
8:	How might others benefit?	How will you disseminate your work to others?

(4) Writing up your report

It is generally sensible to begin writing the output report as soon as you have sufficient information to facilitate analysis and review, as the process of writing often stimulates creative thought and helps to reveal information gaps. As new ideas and information gaps arise, try to note these for further investigation in a notebook or computer file, but at the same time, press on and aim to complete an initial, uninterrupted draft of the section or chapter you are working on. The need for clarity and precision of expression cannot be over-emphasized. If necessary, include a glossary of technical terms and seek to avoid using obscure words and complicated forms of expression so as to maintain an accessible literary style. Avoid writing in jargon.

The literature review is not an independent output but it is likely to merit a separate section (or chapter of your thesis). While abstracts are helpful in identifying suitable articles, the review should not be constructed merely from a review of abstracts - rather, key articles should be read and summarized carefully. Thereafter, the review might be organized thematically so that links between articles (and between themes) can be made to aid readability and flow.

The literature review should read like a good story - aim to keep the reader's attention, keep to the point and provide plenty of 'signposting' in the form of summary and concluding statements. It is essential that your output is written in a logical and progressive way, though the structure of the review is your choice - simply justify how and why you have decided on a given framework. Remember though to make things as easy as possible for your internal reviewer by providing a clear rationale for your approach and re-capping: what have you just covered? What is coming next? How do they inter-link?

Putting the review together:

1:	Dump your thoughts under draft headings
2:	Add review / discussion interpretation
3:	String it all together by 'signposting' your work

Try to carry the reader with you at all times and write clearly, simply and in keeping with your aims and desired outcomes. In all this, the essential role of the literature review is to add value to your output / project - so keep thinking about what you've got, what you need, how to summarize it and especially how to use it to illuminate your topic. The literature is there to add value, depth, breadth and a measure of objectivity to your work - make it work for you - if one or more of the items you've collected don't actually fit with your emerging framework, then don't use them - but do cite them in the reference list.

Finally, in terms of writing style, do what works best for you and the output / project (don't feel that you have to copy anyone else's approach). Remember too that the output should not normally exceed the target word length (nor fall short of the target) excluding appendices, which should be kept separate from the main body and kept to the minimum number necessary to support the text.

In summary: Read - think - write - read - think - write - read - think - write and keep going until you are done. This is a cyclic process and a good review is rarely written on the first cycle. Never try to write and edit at the same time.

Some aspirations for your written report

- Look for themes and structure
- Develop logical argument
- Use evidence (from the literature) to support your argument(s)
- Compare and contrast different author viewpoints
- Critically evaluate the findings of your literature review – don't accept on face value – especially if there are different viewpoints and/or conflicting evidence
- Critically evaluate the contribution of prior theoretical frameworks and models – the test of good theory is whether it can be used (or not) in a practical way – does it help to illuminate your question(s)?
- Draw out and summarize the key issues

Avoid: describing the literature and regurgitating from your source material.

Appendix 1: Structuring and referencing your work

Use the following guidelines to help structure and reference your work in a consistent format:

Title page

Aim to use a concise title using 10 words or less. A sub-title (if necessary) may be used to expand on the title.

Table of contents (for project reports)

The table of contents should list all the chapters, main headings and sub-headings in the report, together with the page numbers where they may be found. It is generally easier to compile after completing the report. Use a table (e.g. *Table* 'insert table' command or use the *Insert* 'index and tables' command in Microsoft Word) so that the list of contents and pages numbers are properly aligned.

Aim to use headings and sub-headings in a consistent way, and try to ensure that they describe as succinctly as possible, the text that follows. Ideally, headings or sub-headings (as appropriate) should relate to a block of text that is no more than 500 words in length and no less than 300 words.

Lists of tables, figures or other materials (for project reports)

If the report contains exhibits, figures, maps, tables or other types of materials, each should be listed separately on the page following the table of contents. A list of exhibits should appear on one page and a list of figures on the next. In layout, such lists should follow the style of the table of contents. The number of the item is typed at the left-hand margin of the page under the appropriate column heading 'Exhibits' 'Figures' 'Tables'. To the right of the number should be the title of the item, typed as it appears in the text of the report. The number of the page on which the items appear should be typed at the right-hand margin of the page.

Acknowledgements

It is normal practice to cite the contributions made by others to the completion of the output or project report. In particular, any guidance given by a client or specialist adviser should be acknowledged.

Executive summary

An executive summary giving a concise overview of the contents of the report in 200-250 words (single-spaced typescript) should be included at the front of the report.

Body of the text

The body of text begins with the first page of the opening section and new sections should begin on a new page, with care given to the way in which the text is divided using sub-headings and paragraphs so as to help the reader and facilitate logical and progressive development. New paragraphs should be denoted by a blank line separating it from the previous paragraph.

In the interests of achieving a professional and consistent appearance, reports should be typewritten in accordance with the following presentation requirements:

- Use single or one and a half spacing throughout **except** for the executive summary, table of contents /figures, quotations, footnotes and references, all of which should be in single spacing.
- Use good quality white paper and use one side of the sheet only with margins of at least half an inch (1.25 cm) on either side of the text.
- Number pages consecutively through your typescript (starting from the first page of the opening section). If you have to insert one or more pages prior to submitting your work, number them as follows - two additional pages inserted after page 14 become pages 14(a) and 14(b).
- Be consistent in spelling, punctuation, use of capitals, abbreviations etc. If in doubt, use a dictionary.
- Extracts (such as quotations) of more than 40 words should be indented, starting on a new line, and single-spaced.
- The source of all extracts, short or long, and of all tables, illustrations etc., derived from another source should be acknowledged.

References

The reference list, positioned at the end of your output or project report, reproduces in full, the relevant works you have consulted (published and unpublished) and should include all references that have been cited in the text. The references should be arranged alphabetically by author and if you are citing multiple references by the same author, they should be arranged by date or alphabetically by publication. Each entry should begin at the left-hand margin using single-spacing but with a space between each entry.

References must be complete and cited using the Harvard system as illustrated below:

References in the text must correlate with the reference list and should be cited by name and date thus: Smith (2005); Smith and Eccles (2004); Smith, Eccles and Brown (2003). Where a reference has four or more authors it should be cited thus: Smith et al. (2002). If there are two references for Smith and Eccles (2004) these should be designated 2004a and 2004b. The same will apply to Smith et al. even if the co-authors in these references are different.

References in the reference list should include the names of all the authors and where several papers by the same author are cited these should be arranged in single author, double author and multi author groups (in that order). The references must be arranged chronologically within each group, the earliest first. The majority of references fall into the following categories and should conform to the examples given below:

Journals

Harrison, R. (2007) 'Action learning: route or barrier to the learning organization?' *The International Journal of Workplace Action Learning*, 8, 6, pp 27-38.

Books

Johnston, G., Scholls, K. (2006) *Writing Corporate Strategy: Text and Cases*. Brown & Jones (London) 3rd edition.
Minburg, H. (2005) 'The format of organizations' In: *Readings in Business Management* (eds. D. Ash & C. Bowden) Explorer Press (London).

Company reports

Hill, R., Brownell, C. (2006) 'Investment Research UK and Europe: UK Leisure Sector' Norman Marsden & Co. International Ltd. (London).

Conference reports and proceedings etc.

Torvill, C. and Dean, G. (2006) 'Capitalising on the brand'. *Proceedings of the Household Research Society Conference*, Glasgow, February 2005, p. 42.

Unpublished work

Webster, M. (2005) *Strategic Management: The Case of NorthBourne Hotels*. Blue Hills University, Unpublished MPhil Thesis.

Appendices

The purpose of an Appendix is to free the main body of the text from fine detail that might interrupt the flow of the narrative. Tables that present extensive data or data of minor or peripheral importance, copies of sample questionnaires, exhibits, diagrams and other materials pertinent to the subject matter of the report are generally better placed as an appendix to the report rather than incorporated at the appropriate point in the text. Appendices should be positioned immediately after the main body of the text and each appendix should start on a separate page. Further, they should appear in the order that they are referred to in the text, citing wherever possible and appropriate, the source of material from which the appendix is derived.

Confidentiality

If your output report is commercially sensitive and/or confidential, please state this and only the internal reviewer, facilitator and independent reviewers will have access to your work.