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## Generating a Quick Compression Planning Report

Patrick McNellis oversees the function of getting the reports to our clients after our facilitating a CP session. He either does the work or subcontracts it and makes sure it meets the standards needed before getting the final report to a client.

The following is Pat's advice on how to generate a quick report. His record, to date, is getting 60 storyboards into one report and having it in the client's email inbox before 8:00 a.m. the next day.

### **Patrick McNellis' Insights on CP Reports...**

The companies and organizations we work with want a real fast report versus something slick and glossy that takes time to develop.

I've spoken with Compression Planning Alumni who are using other programs to generate reports, but I personally prefer a simple word processor – in our case, Microsoft Word.

### **Preparing your space to generate the report**

Now, I know this sounds simple, but clear off your desk before you start! You'll be spreading piles of cards out and you want to make sure you keep them in sequence.

If you have a storyboard near your desk, then use it to pin the taped columns of cards up. I usually just take a piece of tape and tape each column on the wall in front of me. I can fit five columns on the wall in front of me which saves time.

There are two things that will make your life a lot easier in tracking the input of your report. First, I always lay out the envelopes (which I marked with a number before taking the taped cards off the storyboards) in the sequence I need to input them. I then have large envelope or a small box that I put the smaller envelopes in after I am done inputting the cards.

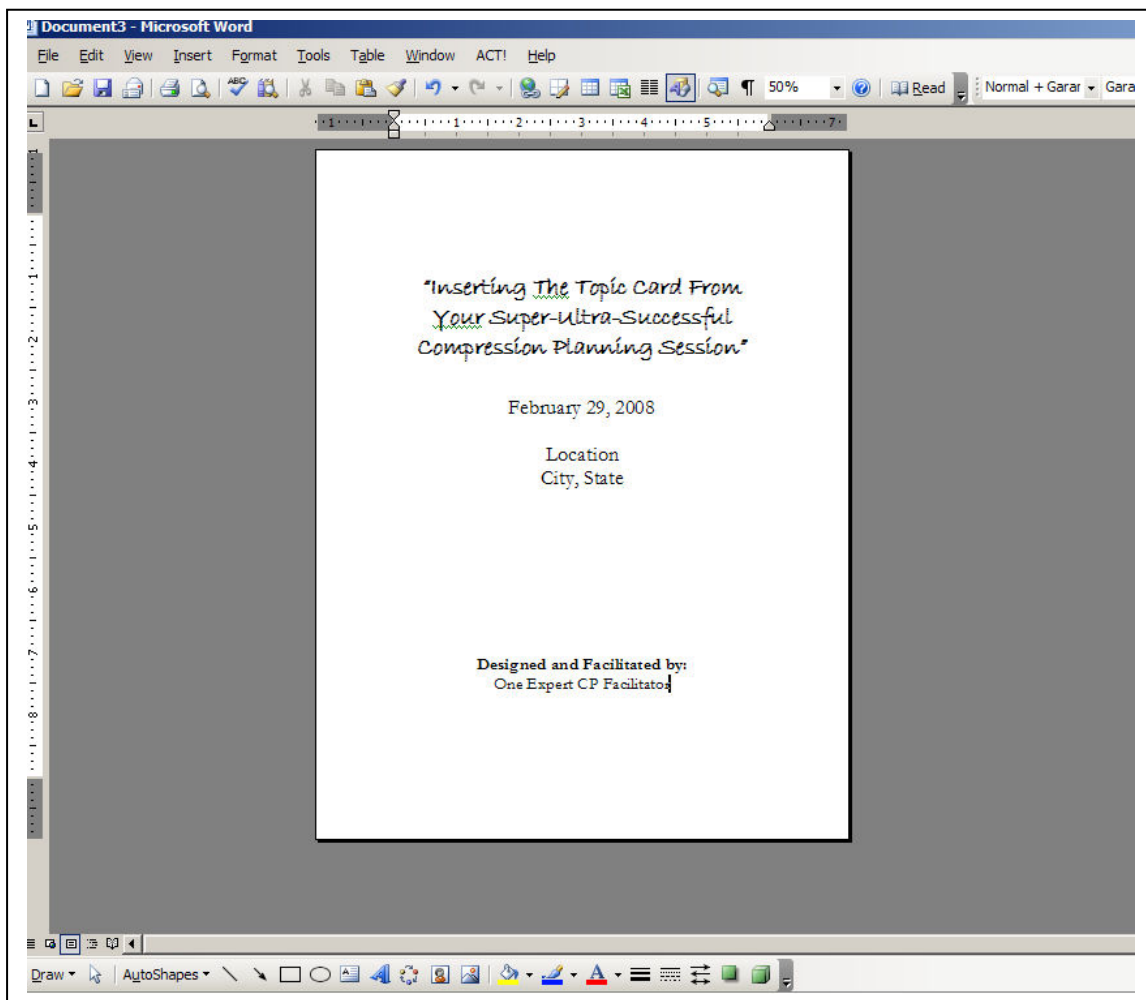
Before I put the envelope in the box/large envelope, I put a check mark on the smaller envelope which let's me know I am done with that particular envelope. It sounds simple, but when you are inputting a large report, it's the small things like this that make it a lot easier.

# The 3 Golden Nuggets of a CP Session Report

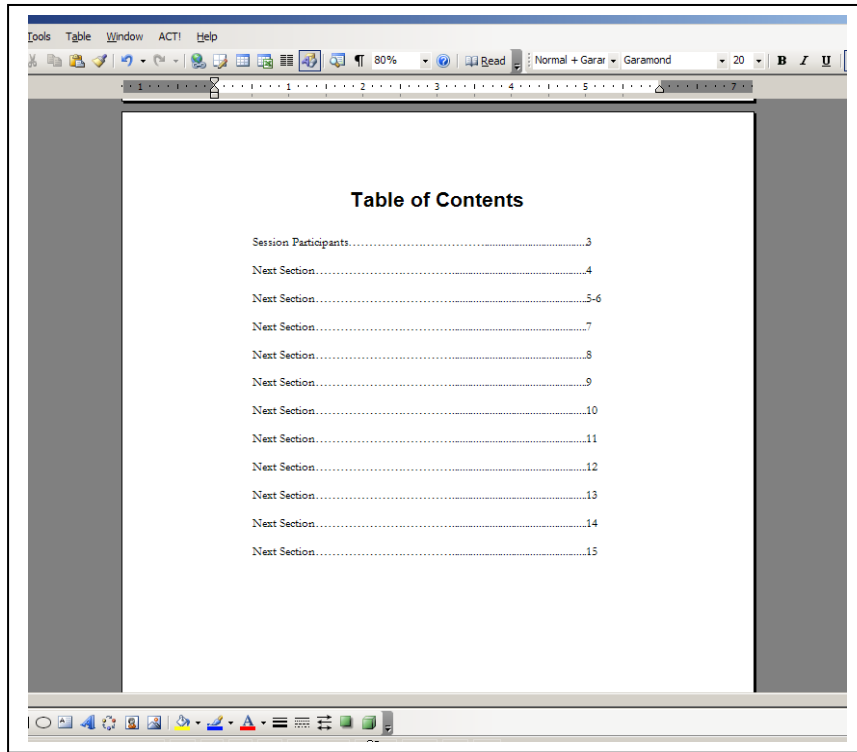
When putting together your report, there are three parts of the session that really drive the report. They are your Concept, your Action Plan and your Communications Plan. These parts are the “meat” of why you “meet” or rather, met.

When putting together a report, this is typically how it goes together.

1. Start out with a **Title Page**. Where do you get your title? Your topic card!  
It’s also a good idea to put the date, the location and who facilitated the session on this first page.



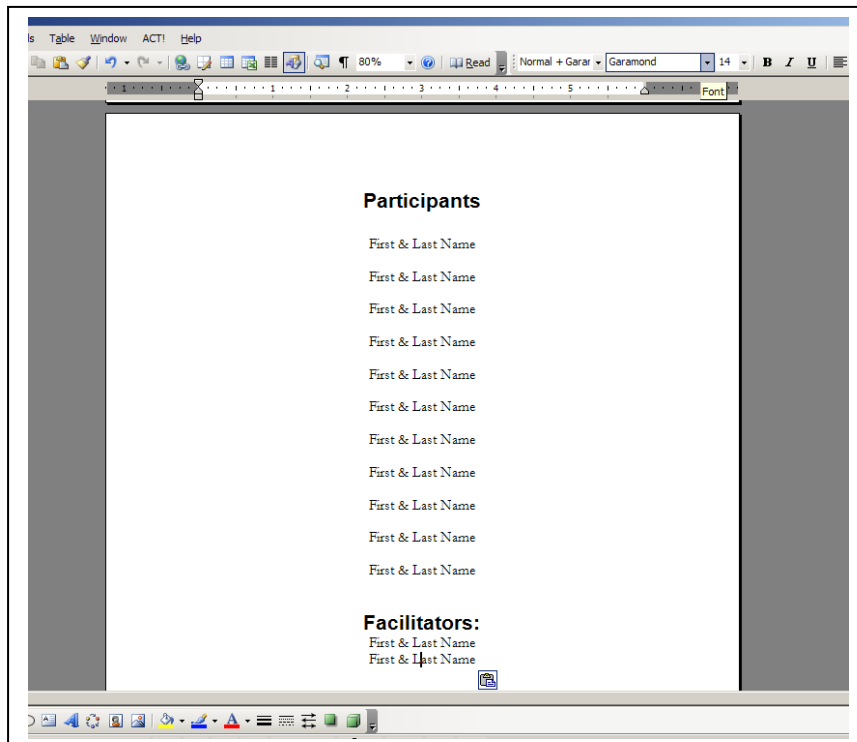
2. The next page is typically the **Table of Contents**. This is usually developed as the LAST step in putting together the report.



The screenshot shows a software window with a menu bar (Tools, Table, Window, ACT!, Help) and a toolbar. The main content area displays a centered title "Table of Contents" followed by a list of sections and their corresponding page numbers:

Session Participants.....	3
Next Section.....	4
Next Section.....	5-6
Next Section.....	7
Next Section.....	8
Next Section.....	9
Next Section.....	10
Next Section.....	11
Next Section.....	12
Next Section.....	13
Next Section.....	14
Next Section.....	15

3. Page 3 is always a **Participant List** – who was there and who facilitated and helped.



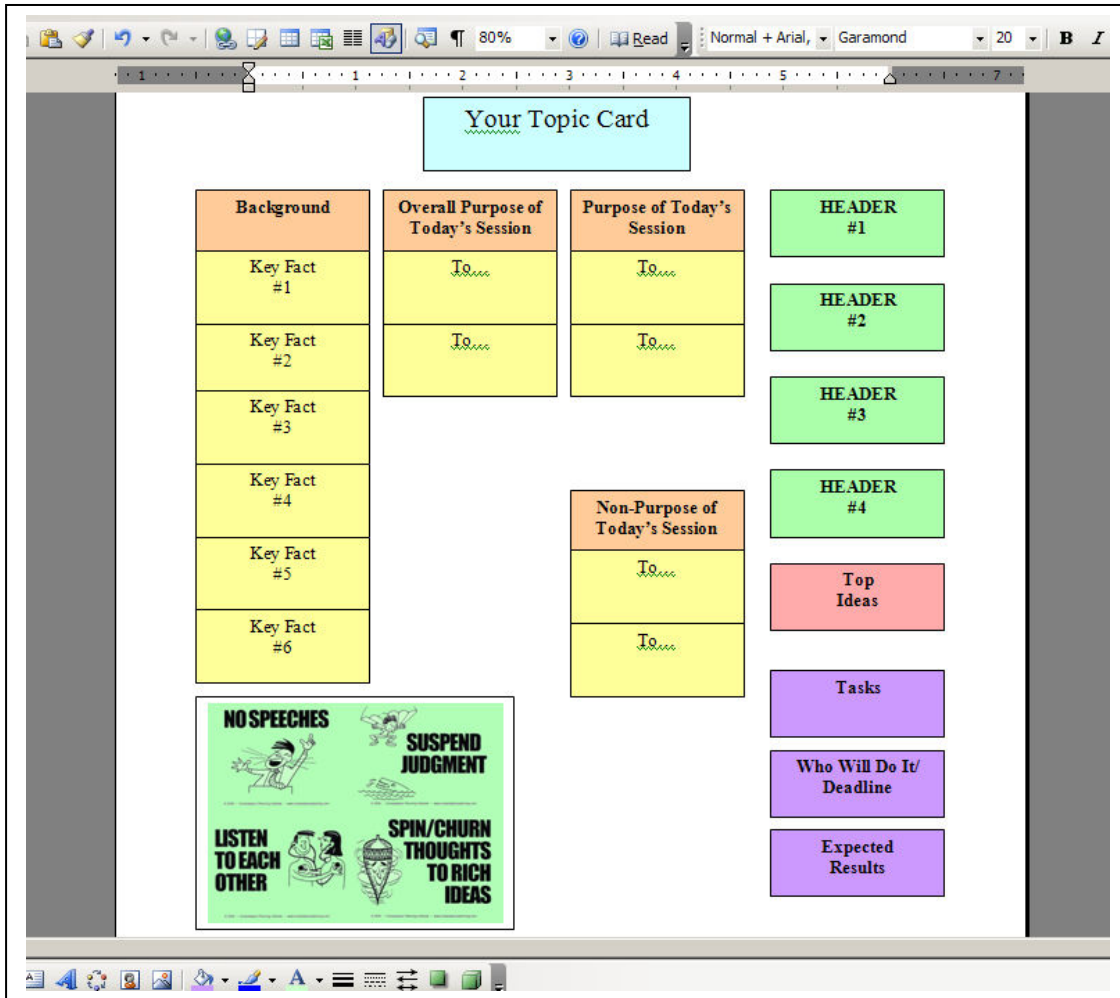
The screenshot shows a software window with a menu bar (is, Table, Window, ACT!, Help) and a toolbar. The main content area displays a centered title "Participants" followed by a list of names, each preceded by "First & Last Name". Below this list is a section titled "Facilitators:" followed by two more names, each preceded by "First & Last Name".

**Participants**

First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name  
First & Last Name

**Facilitators:**  
First & Last Name  
First & Last Name

4. Page 4 can then be the original **Design/Agenda** you followed with the group.

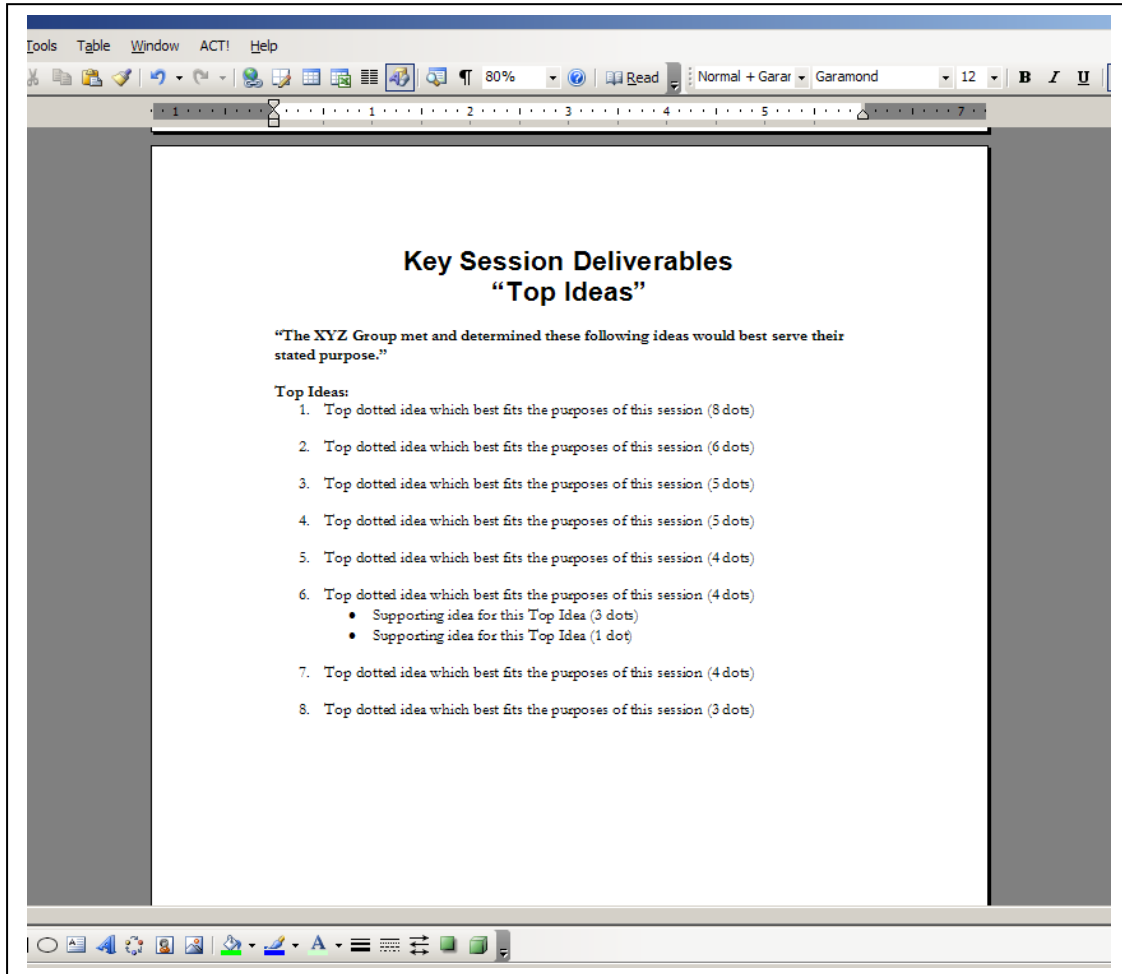


You can use text boxes and color them in to get the “visual effect of your storyboard.” If you do your design like this before your actual session, which often helps a client “see” what it’s going to look like, you can just do a quick copy and paste into the report.

I don’t do the entire report like this for several reasons. You may need to rearrange data several times and it gets too “messy” and difficult if you use the text boxes. Second, it takes too much time and the payoff isn’t worth it.

It does, however, look nice if you include just the design in your report. It gives it the “storyboarding flavor” that straight text does not.

5. I recommend the next section be your **Concept** – your session deliverables. You can put some text to it if it helps tell the story. “The group met to identify the key issues surrounding the purchase of “xyx company.” Or “The following are what the group agreed were the top issues.”



I always put the number of dots in ( ) at the end of a dotted idea.  
For example: Propose discretionary funds (\$100 petty cash fund per month) for each line that doesn’t need “upper management approval” - (6 dots)

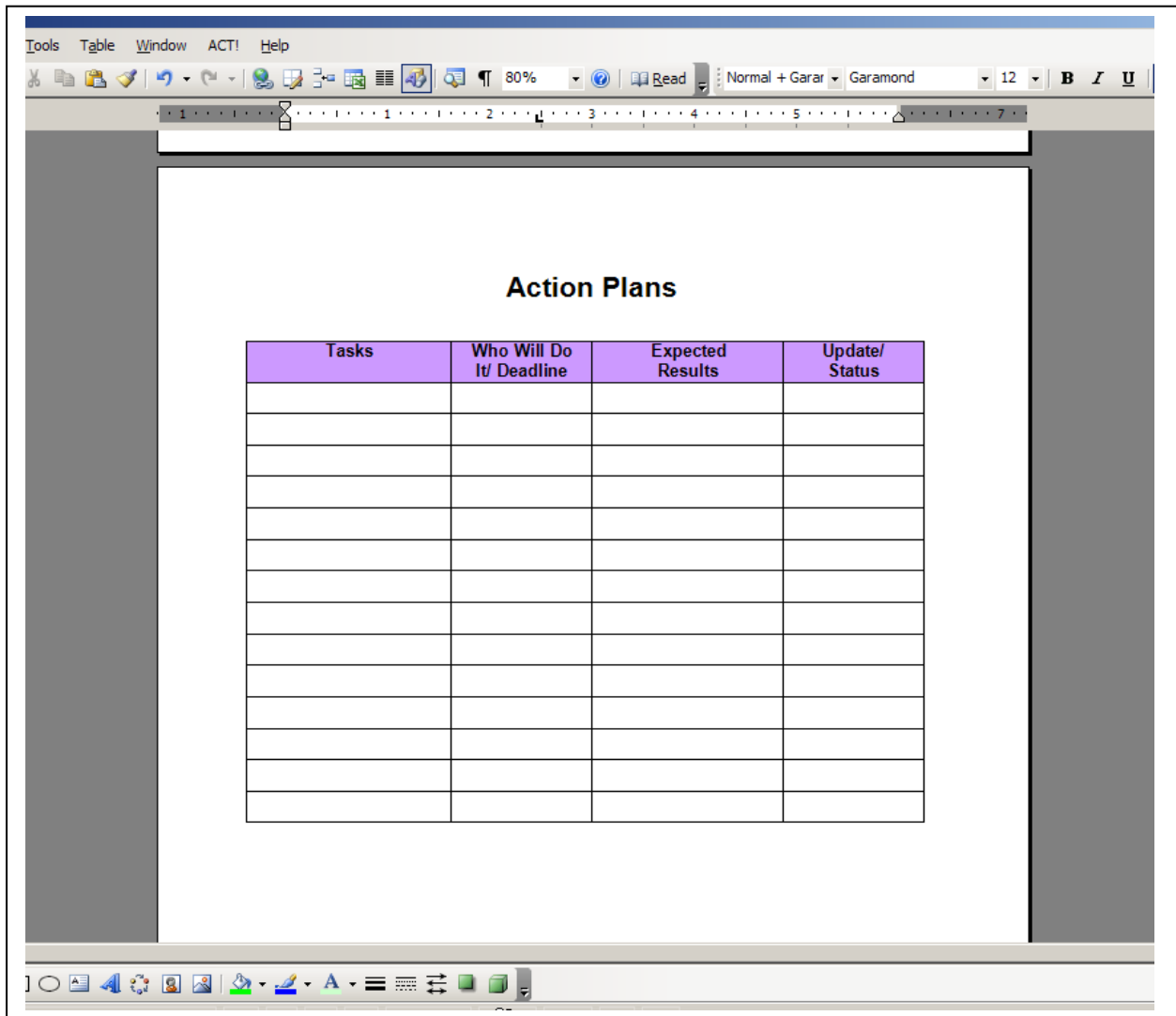
There will be times when you use two (or more) different colored dots. If this is the case, then just put the colors after the number. Just make sure you include a legend of what the different colors mean.

Using the above example again:  
Propose discretionary funds (\$100 petty cash fund per month) for each line that doesn’t need “upper management approval” - (6 blue dots, 5 red dots)

**Legend:** Blue Dots = Supervisor, Red Dots = Management

6. The next page in your report should be your **Action Plan**. I find it easiest to use tables when doing this.

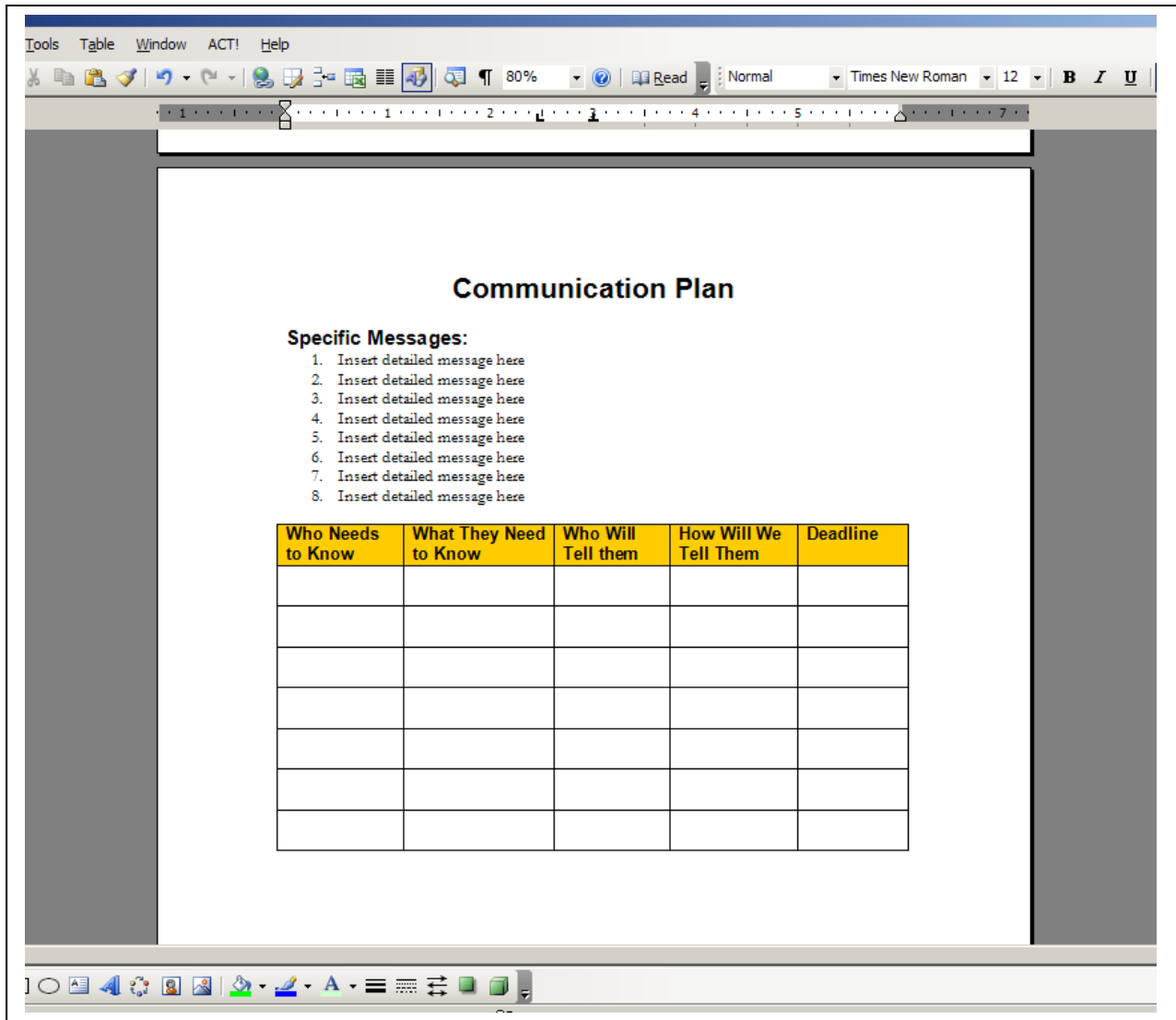
Make four columns with the first being **Tasks**, followed by **Who Will Do It/Deadline** in the middle one, followed by **Expected Results** in the third. I include a fourth column for **Updates/Status**. It gives you the flexibility to track deadlines being met or delayed and the ability to document why.



The screenshot shows a word processing application window with a menu bar (Tools, Table, Window, ACT!, Help) and a toolbar. The main content area displays a table titled "Action Plans". The table has four columns: "Tasks", "Who Will Do It/ Deadline", "Expected Results", and "Update/ Status". The table is currently empty, with only the header row filled.

Tasks	Who Will Do It/ Deadline	Expected Results	Update/ Status

7. The next page should be your **Communications Plan**. It's easiest to do this by first numbering your messages and then putting the rest in a table format.



You'll want to give more detail to your messages when you generate the report. You may have had a card that said "Time, date and place for the upcoming training" that went up during your session. Now is the time to make sure you have the details – the actual time, the actual date and the location.

You frequently give a shorter message during the session that needs to be spelled out a bit more as a part of the report.

Up to now, this is the meat of your report – the major deliverables. If you are pressed for time to get a report done and out the door, get at least these three parts done.

## The Rest of Your CP Session

There are several reasons you'll want to document everything from your CP session though. They are as follows:

1. There will be ideas that can't be done right now but could be done 180+ days from now that didn't make it to your "concept."
2. By documenting everything, you are forming a knowledge management system.
3. As a reference point when you review or revisit your topic at some point in the future.

I usually have a title for this section that goes something like this – Miscellaneous ideas developed during the session that didn't make it to the 'Key Deliverables.'

I recommend bolding your header question and using simple bullet points that are indented. Don't forget to put the number of (dots) at the end of the idea.

For Example:

### **This is your Header Question (consider using Arial for questions)**

- This is your idea with the number of dots included (12) (consider using Garamond or Times New Roman)

I personally don't worry about arranging the cards from highest dotted item to lowest until *after* I am done inputting the cards. Word has a very cool function that allows you to quickly rearrange your ideas. If you highlight the line (or even just put the cursor on the line it will end up highlighting itself) and then hit shift + alt + the arrow keys, you can either move an idea up or down.

If you used your Retrieval Envelope, make sure you don't forget to enter the cards from there. I usually have a heading that says "Retrieval Envelope" and then I bullet point the cards that are in there.

At this point, when you have everything inputted from your session, go back and fill in the page numbers and details for your Table of Contents.

That, my friends, is a CP report.

### **For more information, contact:**

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p.s. – If you'd like me to look over a report for hints and suggestions, contact me!