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# THE DIGITALLY ENABLED BUSINESS CLINIC

A HOW-TO GUIDE

# CONTENTS

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**Acknowledgements - page 3**

**Executive summary - page 3**

**Introduction and context - page 5**

- The UK SME productivity issue - page 5
- The Business Clinic - page 8
- The Business Clinic Success - page 8
- The Digitally Enabled Business Clinic - page 9

**Resources - page 14**

- Classroom and meeting space - page 14
- Undergraduate students - page 15
- Software - page 15
- Staff - page 15

**Process - page 17**

- Client recruitment - page 17
- Brief development - page 21
- Team recruitment & selection - page 22
- Consultancy training - page 22
- Managing client-student interaction - page 23
- Consultancy project management - page 24
- Report writing & feedback - page 31
- Final client presentation & feedback - page 32
- Commonly occurring issues - page 32
- Other useful tools - page 34

**Conclusion - page 36**

**Appendices - page 37**

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# EXECUTIVE SUMMARY

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The Digitally Enabled Business Clinic (DEBC) builds on the success of Northumbria University's Business Clinic (BC). The DEBC enables businesses to engage with university students and access free business consultancy, providing the latest knowledge from a range of disciplines and leading to positive business outcomes. We have created, tested and evaluated a digitally enabled model of the BC, which could enable the highly successful BC approach to be implemented quickly and cost-effectively by other universities. Findings revealed clients valued the average consultancy project at £5,174, moreover these projects enhanced business productivity, and stimulated technology and modern business practice adoption. The project also tested the viability of using digital marketing to attract low to mid productivity SMEs to our free consultancy services.

The project reached 47 SMEs of low to medium productivity, providing an opportunity to tap into the perspective of 'young eyes' from our motivated and innovative Business School students. The DEBC provides a cross-functional range of advice (including digital marketing, finance, strategic management) through digital media and tools, removing the need for costly physical infrastructure.

What made this project innovative is that we tested an alternative digitally-enabled model, which could be quickly scaled up. The project was used to determine whether the DEBC concept is a cost-effective way for SMEs to interact with a local university, gain pro-bono neutral advice, access state of the art knowledge and have the added value of the younger generation perspective. We monitored the reach, uptake and impact on business outcomes.

This 'how to' guide for implementing a DEBC provides a step by step roadmap for the formation of DEBCs in other regions. The UK industrial strategy aims to support universities and businesses working together to innovate. Rolling out a network of DEBCs would be an innovative mechanism enabling UK businesses to easily connect with and benefit from existing technologies, new knowledge, insights and fresh perspectives of university business schools.

# INTRODUCTION & CONTEXT

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## The UK SME productivity issue

The 'Spotlight on innovation: How government can unlock small business productivity' report published in July 2018 by the Federation of Small Businesses stated that 43% of SMEs lack the time to innovate. Furthermore, 37% lacked the staff or skilled employees to innovate and 27% simply found it too challenging. Many microbusinesses and SMEs are fully occupied with the day-to-day operation of their business, and either are not aware of how existing technologies or business practices could increase their productivity, or do not have the time or routes to increase their knowledge. Consultancy services can often be an efficient, one-stop shop for business advice, however, many SMEs do not necessarily have the time or resources to access this or know where to get the most appropriate advice. Without effective marketing and engagement, most would not think about approaching a university, either feeling intimidated at the prospect, or not having an easily navigable route to efficiently access the appropriate advice, or being concerned about the potential cost of advice. University business schools remain a national under-utilised resource for economic benefit. At the same time, there is generally a dearth of free, high quality, neutral consultancy available, resulting from tight public finances. However, a number of barriers prevent SMEs from accessing university expertise.

### **1. SMEs find universities intimidating and inaccessible**

Universities can appear complex and even impenetrable to SMEs. SMEs do not have the time, or the resources to navigate their way through.

Reference: 29/08/2018 Print Application - Innovation Funding Service <https://apply-for-innovation-funding.service.gov.uk/application/22526/print/6/16>

How can universities better support local and regional businesses? Andrew Buckley Chief Executive RTC North 31 March 2017 Universities UK.

### **2. SMEs are busy and time poor**

SMEs are more often than not time poor and have limited working capital; investing such precious resource, therefore, requires careful consideration. When making these judgments, owners of SMEs find it difficult to comprehend the level of benefit they are likely to receive in return for their time and money invested. Organisations such as the North East Local Enterprise Partnership (NELEP) help businesses identify opportunities for improvement and opportunities for solutions - of which the DEBC is one of these.

Reference: NE LEP 'BEIS Business Productivity Review; Government call for evidence July 2018.

### **3. SMEs lack resources and the time to conduct feasibility projects**

The vast majority of SMEs lack internal capacity in terms of resources, knowledge and time.

Reference: NE LEP 'BEIS Business Productivity Review; Government call for evidence July 2018.

For example, many SMEs who have low to medium productivity do not have the technology/knowledge resources of how they should apply technology to their business e.g. Deloitte identified that SMEs who utilise cloud computing are 21% more profitable and experience 26% faster growth than those who do not.

Reference: Small business, big technology, Google & Deloitte, 2014.

Such findings suggest that it's not the technology itself that delivers higher productivity but how it is combined with the leadership, culture and the underpinning business model that will drive up performance.

Reference: State of Digitisation in UK Business, Strategic Labour Market Intelligence Report, SQW, UK, Commission for Employment & Skills March 2016.

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65% of SMEs admitted to using outdated Microsoft Office technology, decreasing productivity by not taking advantage of the latest benefits.

Reference: How a lack of tech skills are costing your SME time and money, by Rose Legg-Tero March 22, 2016 <http://www.brighterbusiness.co.uk/lack-tech-skills-costing-sme-timemoney>.

#### **4. Many SMEs do not know how to access a university linked BC**

In our experience at Northumbria University, although we have reached 300 businesses since 2013, there is scope to increase the level of awareness of the BC in the business community.

#### **5. Businesses are not aware of the quality contribution the BC can make**

Businesses require education on what the BC can contribute to their overall productivity - namely the quality of supervised student consultancy with experienced tutors and up to date knowledge that is available from local university resources.

#### **6. SMEs distrust external information and advice**

The NELEP have found that SMEs distrust external information/advice and the NELEP see a role for the public sector (trusted/independent) to play to address this.

Reference: BEIS Business Productivity Review; Government call for evidence July 2018.

#### **7. Employers find graduates lack real world experience.**

The CBI and Pearson Report into graduates found 33% of companies are unhappy with graduates' attitude to work, blaming their lack of resilience and self-management skills. It has also been noted that too many graduates lack basic business etiquette and communication skills.

Reference: Daily Telegraph 11/07/17.

## The Business Clinic

Government spending cuts have reduced the available support for SMEs. As a result, many businesses in the North East and beyond are turning to the free 'professional' advice and consultancy offered by Northumbria University's BC. The only investment required by participating SMEs is their time and travel costs. From 2013 Northumbria University's Business Clinic has given pro-bono consultancy to 300 clients. Based on an anonymous survey of clients 2017-2018, on average, the estimated value of the consultancy advice (in terms of cost of equivalent advice if they had to pay for it) was £5,500 per client. Moreover, 100% of clients said the consultancy they have received from the BC will impact their decision-making.

The DEBC recruited 47 SMEs, delivering over £243, 178 worth of value in consultancy advice to participating SMEs, averaging £5,174 or perceived savings to participating clients. We also know that in the medium to longer term (based on a qualitative investigation into the longer-term impact of Northumbria's existing BC engagement on existing client firms) significant benefits have included:

- New product development
- Service & process innovation
- New market identification
- Validation of new business ventures

## The Business Clinic Success

To date, Northumbria's BC has now given pro-bono consultancy to over 300 clients. Northumbria's BC model has already received two major awards and is a powerful tool for recruiting students who want to gain real work experience in their degree and generally differentiates the business school. As a result, the current service is already mutually beneficial for a range of stakeholders - SMEs, students and the university. However, thus far, these results have come from a significant investment by the university.

Running the BC for 5 years, we have seen\*:

- 100% of clients said the consultancy services will have an impact on their decision-making
- 96% state the services have received positive responses from directors and staff
- 92% of clients say the services highlighted new issues/concerns
- The clients estimate the value of consultancy report is equivalent to £5,500

\*Based on an anonymous survey of clients 2017-2018.



But more than providing a free (trusted/neutral) service (protected by professional indemnity insurance), the DEBC approach enables the SMEs to tap into a range of knowledge relevant to their business from across a range of disciplines, and access to the latest thinking and 'young eyes' perspectives of the students. In line with University strategy, as well as the economic benefits to the local businesses, the student advisors develop new skills in a real-world setting, appreciating the challenges and opportunities which businesses face, which greatly enhances their education and employability prospects.

## The Digitally Enabled Business Clinic

We are focusing on a combination of enabling SMEs to adopt existing technology and embrace modern business practice. It is widely accepted that consultancy advice can make a significant difference to the productivity of a business. Our project uses the vehicle of a DEBC to enable university business school students, working under close supervision, to provide pro bono consultancy to SMEs.

The feasibility study, which informed the development of this guide, targeted low and mid productivity SMEs across a range of sectors, who would benefit from consultancy advice.

### **Rationale**

The UK industrial Strategy aims to support universities and businesses working together to innovate. Evidence at Northumbria University shows that the BC approach of providing pro-bono consultancy, can bring significant business benefits e.g. the BC "produced work of the highest standards and their work will ultimately result in us growing our business" (NC Insurance - a recent BC client). The BC is a vehicle for opening up the University's untapped resources for the benefit of the local community.

### **Our approach**

This innovative project proved the DEBC concept is a cost-effective, quick-to-implement, way to widely reach out to SMEs - enabling them to interact with a local university, gain pro-bono neutral advice, enhance capacity and access state of the art knowledge and a younger generation perspective, boosting their productivity. Furthermore, rolling out such a network of DEBCs would be an innovative mechanism enabling UK businesses to easily connect with and benefit from new knowledge, insights and fresh perspectives of university students, who in turn benefit from applying their knowledge to real business challenges.

We have created, tested and evaluated the DEBC, reporting on the business outcomes arising from the project. Also, we have prepared a set of compelling research and this "how to" guide on setting up and operating a DEBC.

### **Overcoming barriers**

1. SMEs can find universities intimidating and inaccessible - The DEBC provides a smaller, more approachable entity SMEs can liaise with.
2. SMEs are busy and time poor - The DEBC provides client advice digitally, thereby enhancing productivity.
3. SMEs lack resources and time to innovate - The consultancy will be pro-bono and supported by experienced academics/consultants facilitating knowledge transfer. Therefore, the burden on clients is reduced.
4. SMEs lack awareness of the BC and the potential contribution - Digital outreach will be enhanced by using online channels. The DEBC project measured the effectiveness of various digital channels to recruit and engage with SMEs. Digital engagement will help the BC reach SMEs they would not traditionally meet and create more opportunities to engage.
5. SMEs find graduates lack real world experience - The student experience provided by the BC improves the skills of graduates and particularly in demand areas (digital).

### **How the DEBC represents innovation**

Most SMEs would not think to work with a university or a university-linked BC. We created an innovative DEBC, which will use digital marketing to attract a range of SMEs and digital tools to interact to provide pro-bono consultancy advice. Use of digital platforms will simultaneously, mean there is not a requirement for such extensive infrastructure or premises and thus decreases the operational cost of the BC model more generally. Moreover, the shift will encourage both participating SMEs and students to engage with digital technologies (MS Sharepoint, Google Docs, Whatsapp groups, Skype, Facebook groups, etc) that will facilitate remote, collaborative work. This will save time for the SMEs.

### Impact on client productivity

The DEBC has been able to provide valuable insights to clients from a range of industrial sectors. Although, at the time of writing, still at the early stages of actioning the suggestions made, participants were asked to speculate on the expected impact the consultancy would have on their productivity. As a broad indicator of impact, the clients were asked to show their level of agreement to the following statement:

*“This project will likely enhance my organisation’s productivity”*

The results of which gave a mean score of 5.44 out of a possible 7, showing an overall positive position with thirty-seven participants in agreement, four in disagreement, and a further six holding a neutral position (Figure 1). Clients were similarly asked to rate their agreement to the ability of their project results to impact financial performance. Whilst this was slightly less so, there was still a notable skew towards the positive with a mean score of 4.85 out of 7.

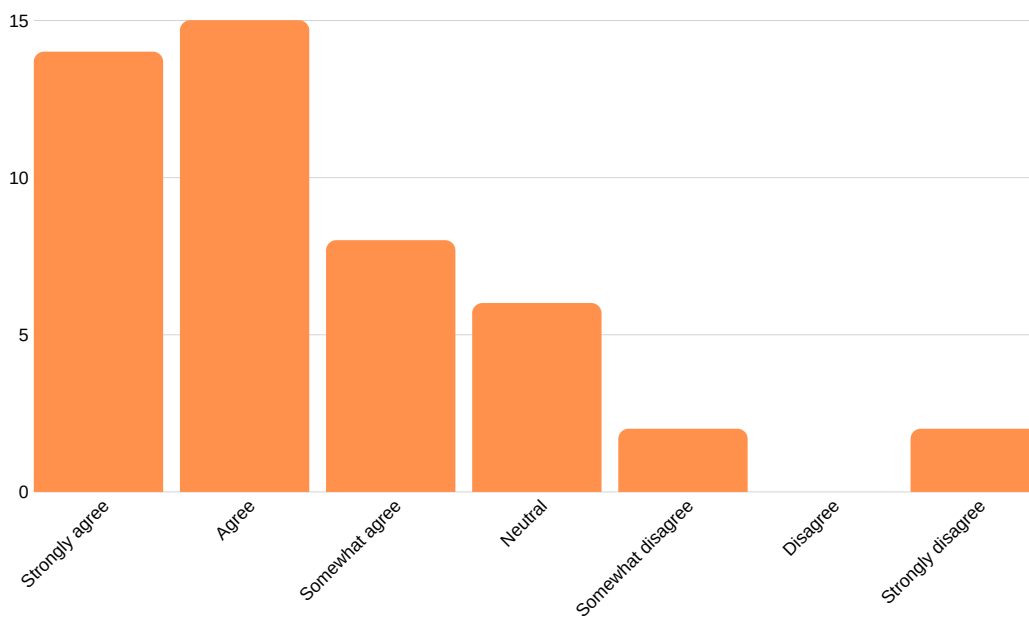


Figure 1: Likelihood of the DEBC Results Enhancing Productivity

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To offer further clarity on the broad definition of productivity assigned during the survey, clients were given a chance to assign key performance indicators (KPIs) likely to be impacted during their DEBC project. Invariably, the KPIs chosen by each participant were significantly context dependent given the purpose of each project and the type of SME. For example, P, 12, considered employee engagement a critical area of productivity, where P, 1, assigned number of orders, website traffic and conversion rate. Regardless of the KPIs chosen, each client was asked to give a score out of ten during the initial interview, then speculate at the end of the DEBC project in light of the insights provided by their student team. Specifically, the clients were asked during the second round of interviews to rate their productivity at present (in light of the project insights), after six months, and again at twelve months after fully implementing the recommendations given.

The results of this qualitative enquiry support those seen within the survey data, with a total of 25 clients suggesting potential short-term improvements to some, if not all of the productivity metrics set. However, it is notable that in some cases the initial impact was relatively small. For instance, P. 6, suggested their turnover would move from 5.5 to 6.5 out of 10. Although in some cases, as was seen with P, 14, the increase was far more significant, seeing a move from 3 to 8 out of 10 for market research:

*P, 14. "I have been much more pro-active in contacting clients (B2B), meeting with airports, safari parks and Jet2. We are have now increased productivity to 7/10 from 5/10 and making progress. Market research moved from 3/10 to 8/10 as the report gives us a blueprint, it's independent and supports what my business is doing".*

When looking further in the future, the findings once again show a positive outlook based on the DEBC interventions. When asked to predict their productivity scores after six months, a total of 17 clients expected further increases, highlighting future potential after fully implementing recommendations. A key example of this is P. 22, who have been able to implement some of the recommendations around their marketing strategy, but admit more time is required to see results. As a consequence of the changes made, they are able to target appropriate market segments more effectively, leading to a predicted two-fold increase in their turnover within 6 months, moving their score from a 4 to an 8 out of 10.

*P, 22. "Turnover within the next six months, I'm very productively working to maximise that, so that will go right up to an 8"*

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Finally, the longer-term impact on productivity (12 months after the end of each project) once again showed some positive predictions, with a total of nine clients suggesting further small increases. It is however worth noting that where the long-term outlook does not show any significant increase in productivity within the client sample, this was mainly due to a reluctance on the part of participants to speculate so far in advance. This issue was also seen at the six-month period, although in this case, only two organisations were unwilling to provide a speculative productivity forecast.

# RESOURCES

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## Classroom & meeting spaces

The traditional BC infrastructure includes a dedicated building which houses - staff office space, boardroom, meeting room, collaborative working space, tiered briefing room and two small seminar rooms. The standalone premises were initially required due to capacity restrictions in other faculty buildings and the need to maintain a professional environment for external clients. In addition, the premise of the BC means that the focus is on collaborative working between students, meaning open spaces where student groups can work on consultancy projects are vital.

Within the DEBC model, the physical premises become less important as the virtual nature of the model means the consultancy work with clients can be completed in a variety of ways:

- Through online collaborative software
- Utilising public meeting spaces - coffee shops, libraries, co-working spaces
- Utilising client offices

In terms of teaching and academic provision of the BC, in a DEBC scenario this can still be accomplished through the use of existing lecture halls and seminar rooms in main faculty buildings where capacity allows.

## Undergraduate students

For the basis of this proof of concept, a total of 128 final year undergraduate students participated from a range of business-related programmes.

The BC is available to undergraduate and postgraduate business students (some exclusions apply).

The BC was built from the idea that each business student would have some element of practical work experience in a professional setting by the time they graduate. Although year-long placements are offered to all students, not everyone will secure a placement. The BC provides real-life experience, teaching skills of accountability, time management, communication and team working.

## Software

Due to the digital nature of this proof of concept, both clients and students were encouraged to use various software to undertake the project.

There were a number of software solutions that were familiar to stakeholders including:

- Google docs - to collaborate on documents as a student team and to show clients progress.
- Skype - to conduct client-student meetings as and when requested by the clients.
- WhatsApp - for regular student-client communications. This was sometimes preferred by clients when students needed to ask questions and a formal meeting was not necessary.
- HubSpot - this is used as a CRM system to manage previous, current and potential client contacts. Project details are also uploaded to each client profile so there is a historic timeline available.

## Staff

The Business Clinic University staff comprises of:

- Business Clinic Director - ensuring the consultancy projects are of appropriate academic rigour, coordinating academic staff teaching responsibilities and taking overall accountability for client relationships with the University.
- Business Clinic Manager - primarily responsible for sourcing appropriate clients for student projects and increasing awareness of the BC proposition across relevant networks. This would also involve a level of marketing activity to promote services offered.

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- Business Clinic Assistant - ensures the logistics of student teaching timetables are met, deals with incoming queries from both students and clients and organises student hand-in dates, initial client meetings and final client presentations. Good organisation skills are key to this role and the seamless running of the BC overall due to the large number of participating students and clients.
  - 11 Academic staff - the taught element of the BC is undertaken by a number of academic staff from the Business faculty. It is not unusual for these members of staff to have experience of working in a professional setting outside of the university sector. Some associates who support the students also run their own consultancy businesses. This is incredibly important for students when preparing them for working in a professional setting and providing insight into the best ways to meet client expectations.



# PROCESS



This section will outline the process of recruiting clients, through to handing over the project to students - a process which is often undertaken by the Business Clinic Manager.

## Client recruitment

Historically, client recruitment was achieved primarily through good word of mouth - either by academic staff or client recommendations. With a level of growth required to meet student numbers and for the benefit of this proof of concept, additional client recruitment activity was undertaken. For this proof of concept, it was integral that the BC demonstrated how clients could be acquired digitally. For this reason, an integrated marketing campaign was implemented which used a combination of online and offline channels.

## **Online**

### **Prospecting display activity**

This was used to build awareness of Northumbria University's BC proposition within the SME target audience. These users had been categorised through 3rd party data and from keyword analysis that showed intent for business consultancy services. Artwork used can be found in Appendix A.

Prospecting display should be used primarily for brand awareness rather than a conversion tool. This channel helps attract new audiences who may not be aware of your product and service but may have a need for this at some point in the future. This was important for the BC to raise profile within the wider SME network.

#### **RESULTS:**

The display activity significantly outperformed the forecast for both impressions and clicks. We secured a click-through rate of 0.14% - which is a strong performance against forecast. More efficient costs in terms of CPM (cost per impression) meant that we were able to serve more impressions for the same budget.

Although this activity did not directly drive enquiry form submissions, 52 users went on to view the Northumbria Contact Us page following exposure to a DEBC ad. This indicated they were looking for a way to contact the University to find out more.

### **Retargeting display activity**

This activity was based on audiences built from professional business services pages of the Northumbria University website. This audience was considered as having an interest in the BC proposition, therefore we used retargeting display activity to try and encourage these users back to the website to find out more and submit an enquiry form. These users would be further on in their customer journey which should make them more likely to convert. Artwork used can be found in Appendix B.

#### **RESULTS:**

The retargeting campaign was activated much later than planned as the retargeting audience pool took longer than anticipated to build. The performance once this activity was activated suggests this would have performed well for us had it been running for longer.

Despite limited impression delivery due to the small timeframe for the campaign, the retargeting activity delivered a higher than forecast click-through rate and two submitted contact us forms.

### Third-party activity

Having a fairly specific target audience for this proof of concept, the BC also tested third party activity through an online publisher of regional UK business news - Bdaily. This activity comprised of an email to their subscribers, a display banner on their website and a featured article. Artwork used can be found in Appendix C.

### RESULTS:

The email activity drove the majority of submitted enquiry forms.

Click-through rates for the display banner and featured article were lower than the forecast provided by Bdaily, however, we maintain this was a useful brand awareness and education exercise.

Lower bounce rates from the Bdaily activity suggests this was a more qualified audience to target for the BC proposition.

### Overall views on digital marketing activity

The activity delivered a significant number of new users to the website. This shows the prospecting activity reached the new audience as required and achieved the relevant brand awareness. With more time and budget allocated, this digital marketing strategy would be reviewed and tested further. Full performance overview can be found in Appendix D.

### Limitations of this proof of concept activity

Due to budget constraints within the proof of concept, paid search advertising was considered as out of scope due to expensive cost per click volumes caused by high competition on 'business consultancy' terms that would be required to achieve the required brand awareness levels needed.

Attribution for digital marketing channels was not available due to internal and external restrictions which means it is difficult to fully understand the value of the digital channels used in this test.

## **Offline**

### **Networking events**

Through an active professional LinkedIn profile, it was possible to discover and be invited to a number of business-related networking events. This was an ideal opportunity to talk to large numbers of potential clients from a range of industries and build awareness of the service that the BC provides. These types of events were important for longer-term client acquisition as it is important to build relationships with potential clients to provide a pipeline of projects for future student cohorts.

### **Business support networks**

Through a combination of networking and university contacts, we have built healthy relationships with other business support networks across the region who help businesses find support and services required. Examples of these support networks are the NELEP, Chamber of Commerce, Scale Up Institute and Business In The Community. These networks are useful signposts for businesses looking for free consultancy advice and to engage with the university sector. These networks can also provide online opportunities to increase awareness and provide leads - showing information on BC services and contact details to get in touch.

### **Communal working areas**

Similar to networking, local communal hot desk spaces provide an opportunity to find out about other businesses and raise awareness.

### **Business accelerator groups**

Contacts who run accelerator and scale up groups such as Barclays Eagle Labs or NatWest Business Growth Enablers provide a ready-made network of businesses looking for contacts that can provide their business support in some way. The benefit of interacting with businesses at this stage is that relationships with the university are built early on in the business life cycle, therefore they provide longer-term opportunities.

### **University cross-selling**

As with any higher education institute, it is important to make wider faculty and university staff aware of the proposition so that they can make contacts aware when appropriate. In particular, those departments which may come into contact regularly with businesses such as Business Development or Careers and Employment. The BC presents a low-cost entry point for an SME to engage with a university. As the relationship matures there could be other mutually beneficial projects that the University and SMEs can collaborate on.

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## Brief development



### **Stage 1 - initial meeting**

In most cases, the Business Clinic Manager will have an initial fact-finding meeting with the client to understand the background of the organisation and what they are looking for from the project. It is within this meeting that expectations are set with the client - clearly communicating timelines for student projects and what is considered a suitable student project. It is important to communicate that the students are acting on a consultancy basis, and will not be an employee of the business during the period of time they are working on the project. This meeting is often conducted over the phone or via Skype, however, in some cases, the meeting will take place at their premises or within the BC. This is dependent on the nature of the project.

### **Stage 2 - project drafted**

Following this meeting, the Business Clinic Manager will compose a draft project brief (Appendix E) - shaping the client's needs into a project that also meets the academic requirements. This draft is sent to the client via email where they are asked to include their objectives and provide any further feedback.

### **Stage 3 - quality assurance**

Once the client has approved the brief, this is quality assured by the BC academic staff to ensure this meets appropriate academic standards for the level of the module; either final year Undergraduate (level 6) or Masters (level 7).

Note: this process is tracked in its entirety on the HubSpot CRM system - using it to store documents but also send emails so that all communication is tracked.

## Team recruitment & selection

- All students wanting to take part in the consultancy project must submit an application which outlines their skills, interests and previous work experience (Appendix F).
- Students are required to form groups of four to create a consultancy team. They are encouraged to create groups with mixed skills - at this point not knowing what kind of client brief they might be assigned. The BC has its own Facebook Page which the students are asked to engage with. This is the main route for students finding a group and communicating in the early stages of semester 1.
- Once students have formed a group, they submit a group form via email which outlines their chosen team name and key information about themselves. It is this form that is used to pair student groups with client projects.
- Student teams are matched with clients primarily based on related subject areas. The matching process is done with a combination of BC staff, as it is important to include those who know the students well enough and those who understand client expectations. Due to staff commitments, this is often done through a video call via Skype.

## Consultancy training

Business Clinic students undertake consultancy training. This includes:

- Understanding the needs and the wants of the client (inc: the organisation purpose and organisational context)
- Managing expectations
- The role of the consultant (questioning, listing, analysing, synthesising, offering)
- Being professional
- Problem-solving in a real-life situation
- Successfully define (or re-define) the problem, gather appropriate data
- Undertaking research (primary and secondary)
- Analysing data
- Making robust and evidence-based recommendations
- Use of specialist IT / software
- Team forming and working effectively
- Leadership skills
- Project management and use of appropriate tools
- Professional report writing
- Professional presentation

The above is delivered prior to the students receiving their consultancy task and meeting their client. It is normally delivered via practical workshops over a period of weeks, however, it can be delivered in 'block-mode' format. Material is provided via a Virtual Learning Environment (VLE). The activities promote personal and group development, commercial awareness, and a range of interpersonal, intellectual and practical skills and knowledge centred on consultancy projects. Once the students (firms) have their brief and have met their client, they have regular weekly meetings with BC tutors.

## Managing client-student interaction

### **Initial client meeting**

All clients are invited to an initial meeting with their student group.

This is organised by the Business Clinic Assistant using an online tool, Calendly. Calendly has the capability for the BC to open slots that clients can book onto on a first come first served basis without the need for manual intervention. As well as providing a booking facility, Calendly will also send automatic reminders to clients ahead of the first meeting.

Students are provided with their client brief ahead of the meeting to allow them to prepare questions and conduct background research.

A member of the Business Clinic staff will always be present at the first meeting with clients, however, these are driven and managed by the students, therefore, the staff member is there only to oversee and ensure the relevant permission and ethical approval paperwork is completed. Due to the increasing outreach of Northumbria's BC, video calls via Skype are used more commonly to prevent the need for long travel by clients which could impact on their workday and productivity.

A successful client meeting is one which the students have prepared adequately for. Student groups which are well informed about the client organisation and have appropriate questions to probe the client further will instil confidence with the client that their objectives are likely to be achieved.

Often due to a lack of experience, students can be easily led by clients. It is important that students try to lead the meeting as much as possible to ensure they gather the required information to kick off their projects.

### Ongoing client communication

Following this meeting, the students maintain contact with the client throughout the process in a way that is agreed with the client. The initial meeting is used to set expectations on communications between both parties. Some clients will have a strong preference for how often and how communication is handled. Due to some client time pressures, online communications is preferred, using WhatsApp, Skype and Google Docs as a means to collaborate.

Ongoing communication between students and clients is key to a successful project, based on feedback from both clients. As with any professional consultancy services, the consultants must have the appropriate knowledge of the business and area to be able to make recommendations that have the opportunity to be implemented. This is usually achieved through students gathering information at multiple stages within the process, not only at the beginning from the initial client meeting.

Increased use of technology aside from email means that clients and students can work together in a more flexible manner.

## Consultancy project management

Consultancy projects are usually undertaken in the second semester, with the initial preparation conducted in semester 1. The student groups are split into smaller numbers for practical workshops - each of them with tutors that have knowledge of their subject area. Half of the students in the workshop will be allocated to a tutor for personal tuition. It may be helpful to have these meetings in the workshop sessions to get to know the students. A draft Teaching & Learning Plan for semester 1 activities can be found in Appendix G.

The BC assessment is comprised of a consultancy report, worth 60% of marks, and an individual assignment, worth 40% of the marks, constituting a literature review and reflective statement. Please see the Teaching & Learning Plan in Appendix G for more details.

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Easter	Week 11	Week 12
Project Overview & Gantt Chart Development	Project Workshop - Ethical Approval and Client Visit Risk Assessment	Project Workshop - Secondary Research	Literature Review Support	Project Workshop - Primary Research Design	Project Workshop - Data Collection	Literature Review Support	Project Workshop - Data Analysis	Project Workshop - Report Write up	Literature Review Support		Project Workshop - Draft Final Report	Assignment Hand-in Week

Figure 2: Second semester indicative schedule



Please note: Staff are unable to read complete literature reviews. Students are advised to complete literature reviews early to receive more valuable feedback in week 4. In week 7 the literature review session will be focussed on any problem areas they may have. They will have up to 5 minutes in a one-on-one support session with their tutor for discussion and feedback on any prepared work.

### **Week 1 - Overview & gantt chart development**

Use this opportunity to welcome the students back from their Christmas break. Refer to the schedule above to outline the structure of semester 2. We advise students to take the time to fully understand the brief, by continuously communicating with their clients, before jumping into the heavy tasks- especially data collection. It's better for them to have a full understanding of what the client wants before starting their project. Remind them to complete their weekly reflective journals, see Appendix H for a journal template based on Northumbria University's Employability Skills and Attributes.

In this session, students are expected to develop a schedule with key milestones (with start/end dates). The software they use is up to them, though many choose MS Excel. Milestones to consider include:

- Follow-up Client Meeting
- Ethical Approval
- Survey/Interview Design
- Sample identification/selection
- Data collection
- Data Transcription
- Data analysis
- Recommendations development
- Report Write up
- Literature Review Title
- Literature Review Structure
- Literature draft 1 complete 1
- Literature draft 1 complete 2
- Literature draft 1 complete 3
- Assignment Submission
- Client Presentation

### **Week 2 - Ethical approval**

This week students should develop and submit the key documentation required for ethical approval. Students have access to an ethics section on their electronic learning platform, complete with guidance documentation and lecture slides. Note, students will likely submit the forms after the workshop (not during).

Student guidance for week 2:

At Northumbria University, when conducting research, students are required to follow University policy on ethical issues in research and consultancy. Before commencing any research, students must complete the ethical approval form.

Students should consult with their workshop tutors regarding ethical approval. Once completed, these will be independently reviewed within 5 working days

Here are some common areas for students to consider:

- Data storage – ensure data is stored safely in electronic and raw formats. Stored on an encrypted computer, for example, a university network is best practice.
- Consider who will have access to your data.
- Ensure research is conducted on adults over 18 years old, not within NHS or with those considered vulnerable.
- With research, withdrawal can occur at any point. This is important with interviews/focus groups in which participants can stop at any point throughout the interview and afterwards.
- Ensure each interviewee has signed consent forms.
- In qualitative research, people are referred to as participants.
- In quantitative research, people are referred to as respondents..

### **Week 3 - Secondary research**

Remind students to regularly refer back to their brief and objectives when collecting data. Students need to identify what existing information already exists to help them fulfil the project. Clearly, if data exists already there's no need to devote interview/survey questions to obtain it. Students may find the following sources helpful.

Internal subscriptions:

Universities typically subscribe to a number of databases students can utilise to access economic/industry data and reports. Whilst institutions differ in their library subscriptions, Northumbria University students have found the following packages useful during their consultancy projects:

- Mintel
- Market Line
- Euro Monitor
- FAME

External subscriptions:

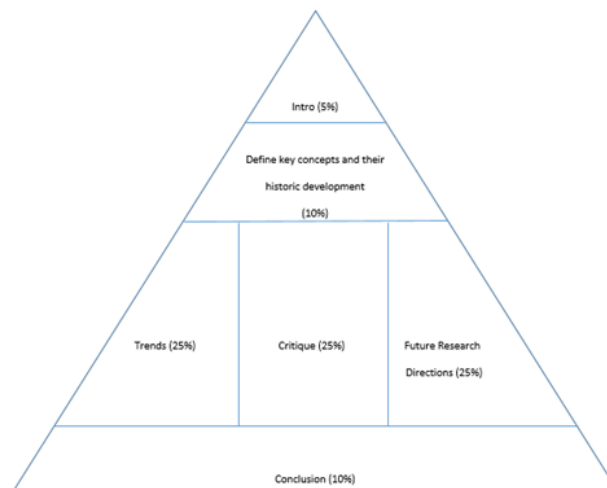
- NHS Digital
- Google Trends
- Facebook Ads Tool
- Office of National Statistics
- Global Edge

#### **Week 4 - Literature review**

Whilst the best literature reviews utilise methodologies and structures outlined in dedicated textbooks and excellent published reviews, initially, students may struggle to understand and approach a literature review-largely because they've never been asked to develop their own research questions and objectives. Thus, students may find the below diagram helpful.

A generic title could be:

X (e.g. Omni-Channel Marketing): Trends, Critique and Future Research Directions



% Represents number of words and is merely for guidance.

*Figure 3: Literature review structure*

Quick Tips:

- Trends – Focus on commonly occurring themes and themes in highly cited papers.
- Critique – Focus on commonly occurring limitations and limitations in highly cited papers.
- Future research directions - Focus on recent directions and directions in highly cited papers.
- Warn students that literature reviews should be current, and not ignore papers from the last 12 months.

### **Week 5 - Primary research design**

Students can begin designing primary data collection instruments once the secondary data has been saturated. Access often drives data collection in the BC, so projects requiring the opinions of managers of North East based manufacturing SMEs will likely be qualitative. However, if the opinions of the consumers of electronic goods in the United Kingdom are required, a quantitative questionnaire will likely be very effective.

Ensure students are collecting suitable data. There is no use asking 18-25-year-old's their opinion about Age UK when they likely aren't their core demographic or carers. Sometimes students will interview/survey anyone they can out of desperation/excitement.

### **Week 6 - Data collection**

Some suggestions for sources of data collection that have proven successful in previous BC projects are noted below. These include but are not limited to:

- Finding businesses to survey
  - The FAME database is a powerful tool that can return the personal and contact details of UK-based staff in a variety of businesses. The ability to search by region, size and industry make the tool particularly powerful.
- Surveying the general public
  - Online groups & appropriate blogs – e.g. Facebook and appropriate forums are an extremely effective way to identify and target samples based on interests and demographics.
  - Distributing via family and friends - If these options fail, friends and family are an extremely effective approach as warm leads often convert at high levels.

### **Weeks 7 & 10 - Literature review**

University modules, and final year projects in particular, usually require a substantial academic component. As the consultancy project and report are intended for a professional audience the DEBC assignment also includes a literature review and reflective statement to ensure appropriate engagement with academic theory and frameworks. Further to the below, guidance on the literature review and reflective statement can be found in the assignment brief (Appendix I). Students should present the first draft in week 7 and the second draft in week 10 for review. When reviewing, consideration should be given to:

- Is title too broad/narrow?
- Are key terms defined?
- Is the work adhering to the agreed title and structure?
- Does the review consider multiple perspectives and contradictions in the literature?
- Is the review critical?
- Is referencing correct?
- Are sources of high quality?
- Do students use recent sources?

Does the scope of the review make sense or has the student arbitrarily decided to review 50 relationship marketing papers? This is extremely common. We cannot expect students to review thousands of relationship marketing papers, but there are some sensible ways to refine the scope. For example:

- Review all relationship marketing papers since the last literature review in 2018
- Review all relationship marketing papers within the SME context
- Review all relationship marketing papers within the top journals in the subject (students may be able to draw upon a methodology outlined in an earlier review for this)

### **Week 8 - Data analysis**

Whilst it is outside the scope of this guide to provide detailed guidance on data analysis, here is some short guidance based on our experience.

- Qualitative - Usually, students use thematic or content analysis to treat qualitative data. Braun & Clarke's (2006) paper entitled 'Using thematic analysis in psychology' provides a helpful systematic approach.
- Quantitative - Given clients read the findings we find descriptive (e.g. pie/bar charts and basic tables) more accessible than more advanced analyses.

### **Week 9 - Report write up**

At this stage, students will be developing client recommendations or finalising data analysis. Please remind students to refer back to their brief and agreed objectives during this stage to ensure alignment. Moreover, students should also be mindful of their client's strengths and weaknesses, from a resource and capabilities standpoint. Recommendations don't need to be just empirically justified, but also feasible to implement. Seriously consider:

- Short/medium/long-term objectives
- Comprehensive costing of recommendations - often given at three points (bronze, silver and gold)
- Expected ROI
- Risk assessment of recommendations can be helpful
- No reference to academic theory or literature should be made in the reports due to this being client facing

### **Week 11 - Report write up**

Students should now be finalising their assignments. Feel free to handout hard exemplars that have been previously approved by clients to be shared with subsequent student cohorts - a report exemplar can be found in Appendix J. All reports are confidential, so no electronic copies should be sent to students. In the past, students have used software tools like InDesign, Canva, Photoshop and MS FrontPage to design their reports. Free templates can be found online. Tutors aren't expected to provide guidance on using this software but are encouraged to use past reports to inspire a professional and stylish final product. Whilst Canva is the easiest, and thus a most popular tool to design reports it does, unfortunately, result in most documents looking the same. Moreover, this appears to stifle creativity and reduce the number of truly excellent report designs we encounter. Given our clients attest that report design and presentation is extremely important, we generally recommend avoiding Canva for report development.

### **Week 12 - Assignment write-up & submission**

Students should now be preparing to submit their assignments. Three printed reports are required for submission and individual assignments are submitted via Turn-It-In. Presentations are usually scheduled 1-2 weeks after submission and slides do not need to be submitted with the assignments. Students will ask about their presentation date well in advance, as many will wish to book flights home/abroad or will start new jobs. Thus, we recommend students keep their schedules open for 2 weeks after submission.

### **Guidance for students**

1. Convey you've really listened to the client and understand their business and needs. This is the most common praise amongst the top consultancy projects, and also the biggest criticism of poor ones.
2. Interact with clients regularly to ensure you are meeting their objectives and you understand their needs. Both clients and students will gain more from the experience with regular contact. Aim to speak to clients at least once a week, even if it's a simple email update. This was the biggest factor affecting success in our empirical review of 32 consultancy projects.
3. Take notes during client meetings to convey you are utilising their time effectively and are listening. This is also crucial to deliver tip 1.
4. Conduct thorough research on the client's organisation and industry in which they operate.
5. Ask clients questions as they are a valuable knowledge source and this will ensure students don't repeat work that may have already been completed.
6. Be prepared, organised and professional throughout - this may be part of a university programme, but the service provided is to real organisations and therefore students should meet client expectations and make a good impression.

## **Report writing & development**

Examples of report structures and writing styles are reviewed with the students. Exemplars, past completed consultancy reports are also studied. The importance of presenting the report to the highest possible professional standards whilst being appropriate for the particular client is made clear to the students. For example, reports are far more effective if written and presented taking into account the particular nature of the client (e.g. SMEs, Social Enterprises, Charities, Multi-Nationals etc.).

## Final client presentation & feedback

The client receives an electronic (PDF) approximately 2 weeks before the presentation and one paper copy (Appendix K). The students are required to email an electronic copy of their presentation before 8am on the day of their presentation or bring their presentation on a memory stick. Students are requested to arrive 10 minutes early where the team leader will report to a staff member in the office. Students are expected to be in business dress (as they would for a graduate job interview). The time slots are 45 minute in length which comprises of:

- 15-minute presentation.
- 15 minutes questions and answers - the client is encouraged to ask questions as a priority as this provides a steer on whether or not the students have met the objectives.
- 10 minutes of private discussion between BC tutors and client once the students have left the room - the clients' view as to how well the students have addressed the brief and their expectations are very important and make a major contribution to determining the assessment mark for the consultancy report.
- 5 minutes for change over for next client presentation.

The presentation is recorded on video for external examining purposes.

## Commonly occurring issues

This section outlines some commonly occurring issues that the Business Clinic team experienced within this proof of concept period.

### **Sample suitability**

Northumbria University's BC is positioned as a consultancy service for small, medium and large organisations across all sectors. Due to previous experiences, the BC does not typically service those businesses who identify as startups - the University has a dedicated service targeted specifically at startups. As this proof of concept is specifically targeted at low productivity SMEs, we maintained our best efforts to service this target market during this period. However, it is worth noting that our provision goes outside of this. The research findings presented throughout are applicable only to the organisations who fit the low productivity SME profile.



Gaining access to participants and collecting primary data is one of the most challenging parts of any university project. This can lead students to panic and rush this important phase, usually by surveying their friends and family via social media platforms like Facebook. Inappropriate samples were a common theme amongst poor DEBC projects because the subsequent results and analysis are inappropriate for the client's context. Those groups that regularly communicated with their clients understood their organisation and the wider industry, appreciated the type of participants required to inform an effective consultancy project.

### **Acquiring clients**

During the process of acquiring clients for student projects, there may be a small number of potential clients who will present with qualities that might not be suitable for work with students. For example, unrealistic expectations of what the students are expected to deliver, unreliable when attending meetings or lack of communication. Although the client is not required to comply with strict terms and conditions and the time spent with students can be flexible, it is important clients are responsive and engaged with the project.

### **Managing clients**

The consultancy project is often a student's first opportunity to deal with a professional business. This may bring with it challenges of how and how often to communicate with clients, organisation and time management skills that need to be fine-tuned throughout and unrealistic expectations of the client. These issues around managing clients are not uncommon and provide learning opportunities that prepare students for graduate work. It is the responsibility of the tutors to coach the students through these challenges. Clients are also reminded throughout the process to provide students with feedback. More serious concerns should be raised by the client to the BC team.

### **Movement in client expectations**

Businesses tend to move at a rapid pace and because of this it is possible for clients to attempt to change the objectives of the project or ask the students to work on additional tasks. This happens on rare occasions and clients are briefed early on in the process by the academic team that the approved objectives are what the student project will be based on.

### **Group working**

The consultancy project is undertaken by a group of students - usually three or four. This encourages the building of team working skills throughout the process. Although group work is common throughout university modules now, there may be some challenges with group work. This often involves balancing the share of work or bad timekeeping. Students are encouraged to work through issues as a team by communicating and working together to find solutions. The BC tutors are able to support this. We are fortunate that technology advances mean that group work between students has become easier - especially for those students who are unable to work together in the same physical location.

### **Lack of understanding with client objectives**

Although both clients and students are provided with copies of the project objectives, it is important to ensure both parties have the same understanding of these objectives. This links closely to communication as this is only achieved through students asking relevant questions and clients reiterating their expectations.

## **Other useful tools**

- Canva.com - This website offers free, professional report templates that are easy to edit. Students without formal design backgrounds find Canva.com an extremely effective tool. The website has a library of high-quality stock images suited for many industries. Warning: Canva.com can produce professional looking reports, but the truly exceptional documents usually come from approaching experienced graphic designers.
- Calendly.com - This free tool allows clients to book meetings from a selection of predefined slots. It reduces the administrative burden of scheduling dozens of meetings.
- Hubspot.com - This free Customer Relations Management (CRM) system helps manage large client recruitment initiatives. In addition to ensuring the DEBC adheres to the latest GDPR regulations, the tool can organise contacts into leads, warm leads and converted clients.
- Google Sheets - This online spreadsheet tool uses cloud technology to enable collaborative, remote working. It is an effective means of managing student consultancy documentation and scheduling mock presentations. The DEBC created a number of templates, see Appendix L, that students can populate as required, e.g. the Group Information Form & Mock Presentation Scheduling Tool. Google Sheets has significantly reduced the administrative burden of running the DEBC.

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- Google Docs - Similar to the above, this cloud-based alternative to Microsoft Word helps student teams work on their project and write their consultancy report collaboratively and remotely. The file history feature can be a useful source of evidence for peer review.
  - Otter - This tool is a free alternative to professional transcription. It uses artificial intelligence to record and transcribe conversations. This can be helpful when collecting qualitative data or capturing meeting minutes. Whilst the software is not 100% accurate, it still significantly reduces the time spent on transcription.
  - Doodle Poll - This tool is an alternative to calendly.com and helps schedule meetings.

# CONCLUSION

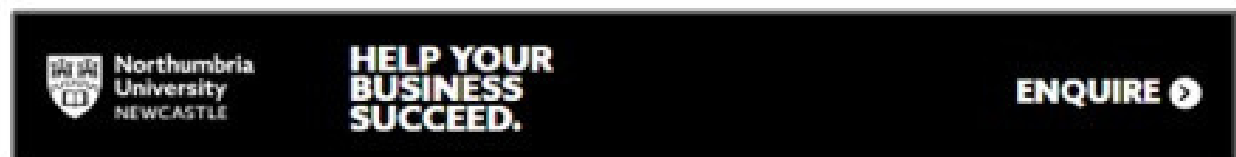
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This guide draws from six years worth of experience operating Northumbria University's Business Clinic and the new Digitally Enabled Business Clinic. The DEBC is a modern solution to reduced Government support for SMEs, an inexperienced pool of graduates and increasing university pressure to deliver impact. At its core, the DEBC is a digitally enabled enterprise that provides pro-bono consultancy to real organisations. This report outlines the DEBC process before providing detailed guidance on the curriculum, client management, assessment and the technology that makes the model feasible. Moreover, we present empirical evidence for the impact this model has on SME productivity.

# APPENDICES

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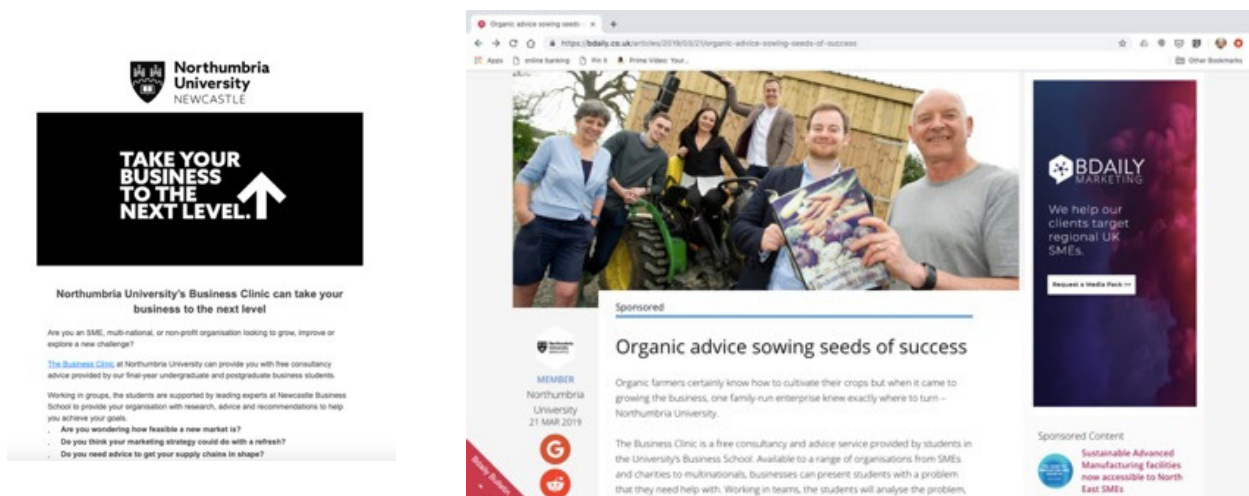
## Appendix A - Prospecting display creative



## Appendix B - Retargeting display creative




## Appendix C - Third-party content



Available at - <https://bdaily.co.uk/articles/2019/03/21/organic-advice-sowing-seeds-of-success>

## Appendix D - Digital marketing performance

Media Channel	Audience	Impressions	Clicks	CTR
Display - Prospecting	Third Party Business Audiences	2,426,510	3,039	0.14%
Display - Retargeting	Non-Converters	11,742	22	0.19%
Display - B Daily Third Party Emails	National E Shot - Email Marketing Subscribers	10,851 sends, 2,049 opens	502	5.62% 
	Bulletin Banner - News Subscribers	55,000	62	0.11%
	Featured Article & Social Sharing	5,017	0	N/A
Tracking	N/A	N/A	N/A	N/A
<b>Total</b>	N/A	2,500,318	3,625	0.14%

## Appendix E - Client brief exemplar

Available at - <https://drive.google.com/open?id=1z9p6C5WBCgTLaupe3eGPMGn4uc9v41dU>

## Appendix F - Group info form

Available at - <https://docs.google.com/spreadsheets/d/1mKNFhWwc435gf7fFpRq4YzFTWd63lMmYck5k30JR8tw/edit?usp=sharing>

## Appendix G - Teaching & Learning Plan

Available at - <https://drive.google.com/open?id=1UALhir8fH8goKhg4P3mmKGGUoTtF6FOo>

## Appendix H - Weekly journals & reflective statements

Available at - <https://drive.google.com/file/d/1sLCb9YkDT2K6cullAzOiomEai4tv8UFT/view?usp=sharing>

Available at - <https://drive.google.com/file/d/1VqXic5bBOZAlvZnmyKvPfJ5IIMR19w2A/view?usp=sharing>

## Appendix I - Assignment brief

Available at - [https://drive.google.com/open?id=1gsMI5pP8OWaY2HR\\_u7-T8k1y17Vo-SFe](https://drive.google.com/open?id=1gsMI5pP8OWaY2HR_u7-T8k1y17Vo-SFe)

## Appendix J - Client report

Available at - [https://drive.google.com/open?id=12q0hIQMua-8Y2RttZCc\\_iSRkAn6HwOAC](https://drive.google.com/open?id=12q0hIQMua-8Y2RttZCc_iSRkAn6HwOAC)

## Appendix K- Client presentation exemplar

Available at - <https://drive.google.com/open?id=1gCRcFpLLiQtQOIbdqWbj9MuDJ52CYXJT>

## Appendix L - Mock presentation schedule

Available at

- [https://docs.google.com/spreadsheets/d/1j8sldTZhMvIGDf\\_LQg1ZfPZByCOV70FpUQSb695o92A/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1j8sldTZhMvIGDf_LQg1ZfPZByCOV70FpUQSb695o92A/edit?usp=sharing)

## Appendix M - Module descriptor

Available at - <https://drive.google.com/open?id=1X1Md4lyj08xp2N85q6FrQoNRZtqfeaF>



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## Appendix N - Follow up email exemplar

Dear Client,

Thank you very much for your enquiry.

As you may already know The Business Clinic has been established since 2013 and since then, we have provided over 220 organisations with consultancy advice provided by our students.

We would be delighted to organise a meeting to discuss your business and potential project in further detail. Please let me know your availability between 10th -14th of July.

If the project is suitable, we will then begin to draft a brief which a group of our talented students would work on between October and May.

Thank you for taking the time to get in touch and we hope to hear from you very soon.

Best Wishes,  
The Business Clinic