Writing Short Reports

In this lecture you will learn to

• Identify the qualities of good reports and proposals.
• Choose the proper length and format of your report.
• Decide when to use direct versus indirect order.
• Organize informational and analytical reports.
• Establish an appropriate degree of formality in the in a report.
• Use headings, lists, transitions, openings and summaries to guide readers through th report.

What makes a good report?

• Reports are essentially a management tool. Even the most capable managers rely on other people to collect information for them.
• You may be surprised that a variety of documents qualify as reports.
• The word report covers everything from preprinted forms to brief, informal letters and memos to three-volume manuscripts.
• The goal of developing a report is to make information as clear and convenient as possible.
• Good reports have three things in common
  – The information is accurate.
  – The content shows writer’s good judgment.
  – The format, style, and organization respond to reader’s needs.

Accuracy

• The first thing a business report must learn to do is to tell the truth.
• To ensure accuracy
  – Check the facts
  – Reduce distortion

Describe facts and Events in concrete terms

• It’s better to say
  – Sales have increased from Rs. 400,000 to Rs. 450,000 in two months
• Rather than
  – Sales have sky rocketed.
Report all relevant facts

• Regardless of whether these facts will support your thesis or please your readers, they are included.
• Readers will be misled if you hesitate to be the bearer of bad news and leave out unpleasant information.

Put the facts in perspective

• If you tell your reader
  – The value of stock has doubled in three weeks
• You are only giving a partial picture, they will have a much better understanding if you say
  – The value of stock has doubled in three weeks rising from Rs. 2 to Rs. 4 per share on the rumor of a potential merger.

Give plenty of evidence for your conclusions

• Statements like
  – We have to recognize the sales force or we are bound to lose market share
• May or may not be true. Readers have no way of knowing unless you provide sufficient data to support your claim.

Present only objective evidence and verifiable conclusions

• Try to avoid drawing conclusions from too less information.
• Also don’t assume that a preceding event is a cause of what follows.
• Example
  – If the sales decreased after a new advertising agency was contracted, it doesn’t mean that the agency is to blame. Other factors may have a role to play in this as well.

Keep your personal biases in check

• Even if you have a personal bias in the subject of the report, try to keep your feelings from influencing your choice of words.
• Such biases not only offend but also obscure the facts and provoke emotional responses.

Good judgment

• Do not include anything in your report that might jeopardize you or your company.
• Keep “politics” out of your report; provide a clear, direct accounting of facts.
• Five points must be kept in mind. (next slide)
1. Getting the main idea at the beginning of the report.
2. Seeing the facts.
3. Receiving the whole story.
4. Reading language they can understand.
5. Learning something that will make their jobs easier.

Responsive format, style and organization

- Before you write decide
  - Whether to use a letter, memo, or manuscript format
  - Whether to group your ideas one way or another
  - Whether to employ or an informal style.

- When making decisions about the format, style, organization of a report, consider its
  - Origin
  - Subject
  - Timing
  - Distribution
  - Purpose
  - Probable reception

Who initiated the report?

- Voluntary reports which were prepared on your own initiative require more detail and support
  as compared to authorized reports, which are prepared at the request of another person.
- When you write a voluntary report, you give more background on the subject and explain your
  purpose more carefully.

What subject does the report cover?

- The subject of a business report affects its format and vocabulary.
- Example
  - An audit report would contain a lot more numbers, often in the forms of tables.

When is the report prepared?

- Routine reports are submitted on a recurring basis (daily, weekly, monthly, yearly) and require
  a lot less background and introductory material.
- Special reports deal with unique situations.
- Routine reports are often prepared on a preprinted format.
Why is the report being sent?

- Internal reports (used within the organization) are generally less formal.
- External reports (sent to people outside the organization) are usually more formal.
- Internal reports are usually under 10 pages, whereas, external reports may exceed this limit.

Why is the report being prepared?

- Informational reports focus on facts.
- Analysis reports include
  - Analysis
  - Interpretation
  - Conclusions
  - Recommendations

Planning Short Reports

- When planning short reports be sure to follow the report-writing customs your audience expects.
- Following three elements influence length and format of your report
  - Audience
  - Purpose
  - Subject matter

Deciding on Format and Length

- Decisions about the format and length may be made for you by the people who request the document.
- Generally speaking, the more routine the report the less flexibility you have in deciding the length and format.

You may perceive the report in one of the following formats

- Preprinted form
  - Basically for ‘fill-in-the-blanks’ reports, deal with routine information, often mainly numerical.
- Letter
  - For reports of five or fewer pages that are directed to outsiders. They follow the normal letter format.
You may perceive the report in one of the following formats

- **Memo**
  - The most common format for short informal reports within an organization. Memos have four headings: To, From, Date and Subject.
- **Manuscript**
  - For a formal approach, manuscripts range from a few pages to several hundred pages.

**Establishing a Basic Structure**

- **Choice of a structure involves three decisions**
  - What to say?
  - Direct or indirect?
  - Topical or logical organization?

**Key points to cover**

- Your report should answer audience's key questions.
  - What ideas would you include?
    - When deciding the content of your report the first step is to put yourself in the audience position.
  - What major questions do you think your audience has about the subject?
    - Your objective is answer all those questions in the order that makes more sense.

- The question and answer chain clarifies the main idea of your report and establishes the main flow of ideas from the general to the specific.
- Business communication tends to be concerned with details: facts, figures and hard data.
Example

Q: Why are we losing money?
A: Production costs exceed prices.

Q: Why are the production costs high?
A: Overhead is spread over low sales volume.

Q: Why are the prices low?
A: Competitors establish the base that we must meet.

Q: Why is the overhead high?
A: We have higher research and development expenses than our competitors.

Q: Why is volume low?
A: We distribute it only in three states.

Q: How can competitors charge less?
A: They have lower costs and higher sales volume.

Q: Are the consumers really concerned about price?
A: They appear to be, although the other factors enter into the decision to buy.

Direct versus Indirect Order

- The direct order gives readers the main idea first, saving time and making the report easier to understand.
- The indirect order withholds the main order until later in the report, helping overcome resistance.

Organizing short Reports

- Regardless of whether you use the direct or indirect order in your report, you must still deal with the question of how your idea will be subdivided and developed.
- The key is to decide first whether the purpose of your report is provide information or analysis.

Organizing Informational Memos and Reports

- The purpose of informational report is to explain.
- When writing informational reports you do not have to worry too much about reader reaction.
- Make clarity the main objective of informational report.
• When structuring an informational report you can let the nature of whatever you are describing be the point of departure.
• For example, if you are describing the company’s sales, you can describe the results for a country as a whole and then for each geographic region.
• Some informational reports are organized according to instructions supplied by the person requesting the information.
• Informational reports takes many forms. The examples that follow will give you an idea of typical organization and tone.

Interim Progress Reports
• Interim progress reports give the customer an idea of the work that has been completed to date.
• The style of such reports is more formal than internal reports.
• When writing about interim reports be honest about the problems as well as the accomplishments.

Personal Activity Reports
• Personal activity reports are often in the form of brief memos and describe the facts and decisions that emerge during conventions, trips and business meetings.
• Personal activity reports are ordinarily written in memo format.
• Because they are non-recurring documents they require more of an introduction than interim reports.

Organizing Analytical Reports
• The purpose of an analytical report is to convince the reader that the conclusions and recommendations developed in the text are valid.
• Analytical reports are generally written to respond to social circumstances.
• They are designed to guide the reader towards a decision.
• Regardless of which type of analytical report you are writing, organize your ideas so that they will convince readers of the soundness of your thinking.
• In the examples that follow we describe the format and style of analytical reports which will give you an idea of how such reports are organized in the professional environment.
Justification Report

- Justification Reports are internal reports used to convince top management to approve an investment of a project, allocate resources to a new project etc.
- A common format followed is use of recommendations to organize the report.
- The structure is extremely efficient because it focuses the reader’s attention immediately on what needs to be done.

New Business Proposal to an Outside Client

- Proposals to outside clients attempt to get products, plans, or projects accepted by outside businesses or government clients.
- A simple formula followed by many professionals is
  - here’s my problem
  - here’s the solution
  - here’s what it will cost

Troubleshooting Reports

- Whenever a problem exits someone must investigate it and propose a solution.
- By using reasons as main divisions in your outline, you can gradually build a case for your conclusions and recommendations.
- You support each of these reasons with evidence that you have collected during your analysis.

Remember

- Organizing analytical reports around a list of reasons that collectively support your main conclusions or recommendations is a natural approach to take.
- However some analytical reports are organized to highlight the pros and cons of a decision.
Making Reports and Proposals Readable

• When the time comes to write a report, you face the challenge of communicating your message in the most effective way to your audience.
• Decisions about formality and structure affect the way your message will be received and understood by readers.

Choosing the Proper Degree of Formality

• The issue of formality is closely related to considerations of format, length and organization.
• If you know your readers reasonably well and if your memo or report is likely to meet with their approval, you can generally adopt an informal tone.
• Write informal reports in an informal style using ‘I’ and ‘you’.
• Longer reports dealing with controversial or complex information are traditionally handled in a more formal manner.
• Being formal means putting your readers at a distance and establishing an objective, businesslike relationship.
• Although the impersonal style has disadvantages, use it if your readers expect it.

Developing Structural Class

• As you begin to write, remember that readers have no idea of how various pieces of your report are linked with each other.
• Readers see the report one page at a time. As you begin, give the readers a roadmap of the report structure so they can see how parts of your reports are related to each other.
• In short reports there is little danger of your readers getting lost.
• As the length of report increases, however, so do the opportunities for readers to become confused and lose track of relationship among ideas.
• Four tools are particularly essential for giving readers an overall structure of your document and for keeping them on track when they read:
  – the opening
  – headings and lists
  – smooth transitions
  – the ending
The Opening

- A good opening accomplishes at least three things:
  - Introduces the subject of your report
  - Indicates why the subject is important
  - Gives the readers a preview of main ideas and the order in which they will be covered.

Headings and Lists

- A heading is a brief title at the start of your report, alternating readers to the content of the section that follow.
- A list is a scheme of words, names, or items arranged in a specific order.
- Using headings gives the readers a gist of you report.

Transitions

- Such phrases so as to continue the analysis, on the other hand, and additional concept are another type of structural clue.
- Additional Details - moreover, furthermore, in addition, besides etc.
- Casual Relationship - therefore, because, accordingly, thus, hence etc
- Condition - though, if
- Comparison - similarly, here again, likewise, in comparison, still
- illustration - for example, in particular, in this case
- Summary - in brief, in short, to sum up
- Repetition - that is, in other words, as has been stated

The Ending

- Reemphasize the main ideas in the ending.
- Research shows that the ending, the final section of the report, leaves a strong and lasting impression.
- Ending provides a final opportunity to emphasize the wholeness of your message.
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