In this lecture you will learn to

- Describe how organizations produce formal reports and proposals
- Prepare all necessary parts of a formal report
- Select and prepare the visual aids to support the text of your report
- Assemble all the parts of a formal report in the proper order and use an appropriate format
- Prepare and assemble all the parts of a formal proposal
- Critique formal reports prepared by someone else

Report Production

- Planning formal reports and proposals, conducting the necessary research, organizing the ideas, developing visual aids, and drafting the text are demanding and time consuming tasks.
- After careful editing and rewriting, you still need to produce a polished version.
- How to produce your report also depends on the equipment you have available.
- Personal reports automatically handle many of the mechanical aspects of report preparation.
- Be sure to schedule enough time to turn out a document that looks professional.

Composing a formal Report

- A professional report conveys the impression that the subject is important.
- The three basic divisions of a formal report:
  - Prefatory parts
  - Text
  - Supplementary parts

Prefatory Parts

- Prefatory parts may be written after the text has been completed.
- Many of these parts such as table of contents, list of illustrations, and synopsis are easier to prepare after the text has been written.
- Other parts can be completed any time.
Cover
- Many companies have standard covers for reports, made of heavy paper and imprinted with company’s name and logo.
- Put the title on the cover that is informative but not too long.
- You don’t want to intimidate your audience with a title that is too long, awkward and unwieldy.

Title fly and Title Page
- The title fly is a plane sheet with only the title of the report on it.
- The title report includes four blocks of information
  - The title of the report
  - The name, title and address of the person that authorized the report
  - The name, title and address of the person that prepared the report
  - The date on which the report was submitted

Letter of Authorization and Letter of Acceptance
- If you received a written letter of authorization to prepare the report or proposal, you may want to include that in your report.
- A letter of authorization usually follows the direct-request plan.
- Use good-news plan for a letter of acceptance.

Letter of Transmittal
- The letter of transmittal conveys your report to your audience.
- Use a less formal style for the letter of transmittal than for the report itself.
- Generally the letter of transmittal appears right before the table of contents.
- The letter of transmittal follows the routine and good-news plan as described in earlier lectures.

Table of Contents
- The table of contents indicates in outline form the coverage, sequence, and relative importance of the information in the report.
- The table of contents is prepared after other parts of the report have been typed, so that the beginning page numbers of each heading can be shown.

List of Illustrations
- For simplicity sake, some report refer to all the visual aids as illustrations or exhibits.
- Put the list of illustrations on a separate page, if it won’t all fit on one page with the table of contents; start the list of figures and list of tables on a separate page if they won’t both fit on one page.
Synopsis or Executive Summary

• A synopsis is a quick overview of the report’s important points, designed to give readers a quick preview of the contents.
• Because it is a concise representation of the whole report it may be distributed separately to a wide audience.
• The phrasing of a synopsis can be either informative or descriptive, depending on whether the report is in direct or indirect order.
• An informative synopsis summarizes the main ideas; a descriptive synopsis describes what the report is about.
• Informative synopsis
  – Sales of super premium ice-cream make up 11% of the total ice-cream market.
• Descriptive synopsis
  – This report contain information about super premium ice-cream and its share of the market.
• Use a descriptive synopsis for a skeptical or hostile audience, an informative synopsis for most other situations.
• An executive summary is a fully-developed ‘mini’ version of the report itself, intended for readers who lack time or motivation to read the complete text.
• Put enough information in an executive summary so that an executive can make without reading the complete text.

Text of the Report

• You will need to make the decisions about the design and layout of the report.
• Aids to understanding the text of the report include
  – Headings
  – Visual aids
  – Preview and summary statements

Text of the Report

• You will need to make the decisions about the design and layout of the report.
• Aids to understanding the text of the report include
  – Headings
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  – Preview and summary statements
• Headings are most powerful format tool available to you.
• By skimming along from heading to heading the readers should be able to pick up the structure or outline of the report.
• This process is easier if the headings are phrased and typed in a consistent way.
Text of the Report

- Visual aids are also useful tools for calling attention to key points and helping readers grasp the flow of ideas.
- Eye-catching graphics dramatize the high points of the message, and informative captions explain their meaning.
- It is also useful to preview summary points at the beginning of each major section or chapter and to sum them up at the end.
  - Tell them what you are going to tell them
  - Tell them
  - Tell them what you told them

Introduction

- The introduction to a report serves a number of important function
  - Putting the report in a broader context by tying it to a problem or a assignment
  - Telling the readers the report’s purpose
  - Previewing the report’s contents and organization
  - Establishing the tone of the report and the writer’s relationship with the audience
- Authorization
  - When, how and by whom was the report authorized; who wrote it; and when it was submitted.
- Problem/purpose
  - The reason for report’s existence what is to be accomplished as a result of the report being written.
- Scope
  - What is and what isn’t going to be covered in the report. The scope indicates the report’s size and complexity.
- Background
  - The historic events and conditions that have led up to the report.
- Sources and methods
  - The secondary sources of information used and the primary sources such as interviews, surveys, experiments and observations.
- Definitions
  - A brief introductory statement leading into a column of terms used in the report and their definitions.
- Limitations
  - Factors indicating the quality if the report, such as the budget too small to do all the work that should have been done, time constraints and other events beyond your control.
- Report organization
  - An organization of the report, along with the rationale for following this plan.
Body

- The body of the report follows the introduction.
- It consists of major sections or chapters that analyze, present and interpret the material gathered as a result of your investigation.
- One of the decisions to make when writing the body of your report is how much detail to include.
- In general provide only enough information in the body to support your conclusions and recommendations.
- Another decision to make is whether to put the conclusions in the body, in a separate section for it or in both.

Summary, Conclusions and Recommendations

- The final section in the text report tells readers ‘what you have told them.’
- Summary
  - The key findings of your report, paraphrased from the body and stated or listed in the key order in which they appear in the body.
- Conclusions
  - The writer’s analysis of what the findings mean. These are the answers to the questions that lead to the report.
- Recommendations
  - Opinions, based on reason and logic, about the course of action that should be taken.
- If the report is organized in the direct order, the summary, conclusions and recommendations are presented before the body, and are reviewed only briefly at the end.
- In action-oriented reports put all the recommendations in a a separate section and spell out precisely what they mean.

Notes

- When you are writing the text of your report, you decide to acknowledge your sources.
- Give credit where credit is due.
- Plagiarism occurs when one person misappropriate without permission, any ideas, facts or words that were originated by others
- In general you have flirted with plagiarism when your business documents fail to alert your audience that you have
  - Repeated someone else’s information word for word
  - Paraphrased another’s material too closely
  - Lifted a series of phrases and put them together with your own words
  - Borrowed a unique term that originated elsewhere
Plagiarism

• Although your company may have more specific guidelines, here are a few general tips on how to handle situation that commonly arise

• Repeating information from another company document
  – If you reuse information appearing another report, your audience may believe that you have independently verified material and eliminated any errors in the original report.

• Using same sources as another Document
  – Consulting someone else’s sources for further information is perfectly acceptable.
  – Plagiarism deals with the way information is reported, not with whether you access the sources used by someone else.

• Repeating information protected by Copyright
  – If you repeat information from books, published articles and other copyright materials, be sure to avoid infringing on the originators’ legal rights.
  – To be safe talk to your company’s management before you repeat information protected by copyrights.

Example

• One approach, especially for internal reports, is simply to mention a source in the text:
  – According to Dr. Aftab of Ganga Ram Hospital, hip replacement operations account for 7% of all surgery performed on women aged 65 and above.
  – If your report is to be distributed to outsiders, you should include extra information on where you obtained the data.

Visual Aids

• When illustrating the text of any report you face the problem of choosing any specific form that best suits your message.
• Moreover good business ethics demand you chose a form of visual aid that will not mislead your audience.

• Tables
  – When your have to present detailed, specific information, choose a table, a systematic arrangement of data in rows and columns.
  – Use tables to help you audience understand detailed information.
Most tables have the same standard parts, as illustrated in the previous slide.

Although formal tables set apart from the text necessary for conveying complex information, some data can be presented more simply within the text.

Tabular information can be introduced within the text without a formal title.

**Line and Surface Charts**

- A line chart illustrates the trend over time and plots the interaction of two variables.
- Use line charts to
  - Indicate change over time
  - Plot the interaction of two variables
- A surface chart is a kind of line chart with a cumulative effect; all the lines add up to the top line, which represents the total.
- This form of chart is useful when you want to illustrate the changes in the composition of something over time.

**Example of a Line Chart**

*Car size plotted against the gain or loss of market share*
Bar Charts

- A bar chart is a chart in which amounts are visually portrayed by the height or length of rectangular bars.
- They are valuable when you want to
  - Compare the size of several items at once
  - Show changes in one item over time
  - Indicate composition of several items over time
  - Show relevant size of a component of a whole

**Performance of different departments during the four quarters in a Software company**

Pie Charts

- In a pie chart numbers are represented as slices of a complete circle, or pie.
- Although they are less versatile, but are nevertheless valuable in your inventory of visual aids.
- When composing a pie chart, try to limit the number of slices in a pie to no more than seven.

**Market Share of Fast Food franchises**

Pizza Hut

- Macdonalds 44%
- KFC 22%
- Burger King 17%
- Freddy's Cafe 11%
- 6%
Organization Charts and Flow Charts

- Use organization charts to depict the interrelationships among the parts of an organization
- Use flow charts to
  - Show a series of steps from beginning to end
  - Show relationship

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Board of Trustees

President

Vice President Operations

Vice President Marketing

Vice President Research
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Conclude the text of proposals and reports with a summary, and if appropriate a conclusion and recommendation

- In a summary, recap the findings and explanations already presented.
- Place conclusions and recommendations in their order of logic or importance, preferably in list format.
- To induce action, explain in recommendations section who should do what, where, when and how.
- If appropriate point up the benefits if action, to leave readers with the motivation to follow recommendations.
Feasibility Analysis
of a Career
in Technical Marketing

for
Professor J. M. Lannon
Technical Writing Instructor
University of Massachusetts
North Dartmouth, Massachusetts

by
Richard B. Larkin, Jr.
English 266 Student

May 1, 20XX
Letter of Transmittal

165 Hammond Way
Hyannis, MA 02457
April 29, 20XX

John Fitton
Placement Director
University of Massachusetts
North Dartmouth, MA 02747

Dear Mr. Fitton:

Here is my analysis of the feasibility of a career in technical marketing and sales. In preparing my report, I've learned a great deal about the requirements and modes of access to this career, and I believe my information will help other students as well.

Although committed to their specialities, some technical and science graduates seem interested in careers in which they can apply their technical knowledge to customer and business problems. Technical marketing may be an attractive choice of career for those who know their field, who can relate to different personalities, and who are good communicators.

Technical marketing is competitive and demanding, but highly rewarding. In fact, it is an excellent route to upper-management and executive positions. Specifically, marketing work enables one to develop a sound technical knowledge of a company's products, to understand how these products fit into the marketplace, and to perfect sales techniques and interpersonal skills. This is precisely the kind of background that paves the way to top-level jobs.

I've enjoyed my work on this project, and would be happy to answer any questions.

Sincerely,

[Signature]

Richard B. Larkin, Jr.
Table of Contents

CONTENTS

page
LETTER OF TRANSMITTAL ................................................................. ii
FIGURES AND TABLES ........................................................................ iv
ABSTRACT ......................................................................................... v
INTRODUCTION .................................................................................. 1
COLLECTED DATA ............................................................................ 2
    Key Factors in Technical Marketing as a Career ................................ 2
        The Technical Marketing Process ............................................... 2
        Employment Outlook and Requirements ....................................... 3
        Advantages of the Career ........................................................... 5
        Drawbacks of the Career ............................................................. 5
    A Comparison of Entry Options .................................................... 6
        Option 1: Entry-Level Marketing with On-the-job Training ........ 6
        Option 2: Marketing and Sales Training Program ....................... 6
        Option 3: Prior Experience in One’s Technical Specialty ............ 6
        Option 4: Graduate Program ..................................................... 7
        An Overall Comparison by Relative Advantages ......................... 7
CONCLUSION .................................................................................... 8
    Summary of Findings ..................................................................... 8
    Interpretation of Findings ............................................................. 8
    Recommendations ......................................................................... 8
REFERENCES .................................................................................... 8

A List of Tables and Figures

TABLES AND FIGURES

Figure 1 The Technical Marketing Process ........................................ 2
Figure 2 The Employment Outlook for Technical Marketing ............. 3
Figure 3 Requirements for a Technical Marketing Career .................. 4
Table 1 Relative Advantages among Four Technical-Marketing Entry Options ......................................................... 7
The feasibility of technical marketing as a career is based on a college graduate’s interests, abilities, and expectations, as well as on possible entry options.

Technical marketing is a feasible career for anyone who is motivated, who can communicate well, and who knows how to get along. Although this career offers job diversity and excellent potential for income, it entails almost constant travel, competition, and stress.

College graduates enter technical marketing through one of four options: entry-level positions that offer hands-on experience, formal training programs in large companies, prior experience in one’s specialty, or graduate programs. The relative advantages and disadvantages of each option can be measured in resulting immediacy of income, rapidity of advancement, and long-term potential.

Anyone considering a technical marketing career should follow these recommendations:

• Speak with people who work in the field.
• Weigh the implications of each entry option carefully.
• Consider combining two or more options.
• Choose options for personal as well as professional benefits.
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