Report Writing

Business and Technical Reports Made Easy

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Writing for your readers

1

What is written without effort is, in general, read without pleasure.

Samuel Johnson, 1709–84

Rationale

- It's far easier to inform or persuade your readers if you understand *who* they are, *why* they want your report, *what* they already know, *how much* they want and *when* they want it.
- If you just guess at this information, you're likely to write for the wrong people, provide the wrong information and/or pitch it at the wrong level.
- It follows that it's sensible to spend time researching your readers' identities and needs *before* you try writing for them.
- Taking the trouble to write a *good* report, not just a mediocre one, generates benefits for all parties: you, your readers, your organisation and your organisation's clients.

Outcomes

You will be able to complete these tasks:

- Explain the importance of identifying your readers and their needs.
- Identify how much detail your readers need and will understand.
- Interview readers in a style that encourages them to identify their needs.
- Create a who-needs-what table to organise your writing.
- Describe a strategy for providing information to diverse groups of readers with different needs.
- Describe a strategy for dealing with conflicting needs.

1.1 What do I need to know to write a report?

So you've been asked to write a report, and perhaps you're feeling a bit lost. The good news is that the process of report writing is one that can be easily learned. Let's start with a definition that we'll discuss further in Section 1.12:

> A report provides **detailed information** about a subject **in order to answer a set of questions** of interest to its readers. Sometimes these questions are provided for you up front; sometimes you have to work hard to uncover them. Reports often include conclusions and recommendations.

Okay then. You'll be answering questions that are important to your readers and perhaps offering opinions and advice. Before you can start to write a successful report, though, it's essential to do the necessary preparation. At a minimum, this requires taking the time and effort to get good answers to the following questions. Do this *before* you open up Microsoft Word and start feverishly typing:

1. *Who* will read my report?
2. *What questions* do my readers want answered?
3. *What level of language* will my readers understand?

The 'big three' questions

4. *How much* do my readers want?
5. *When* is my report due?

Let's consider these separately.

1.2 Q1. Who will read my report?

Why should my audience affect what I write?

Let's say that your manager asks you to write a short report detailing the strengths and weaknesses of various e-commerce products that your company might purchase. He leaves your office before telling you who the audience for the report is. Consider the possible readership that such a report may be destined to have:

1. The report may be for your manager only.
2. The report may also be for the CEO.
3. It may also be put on your intranet so that your colleagues can read it.
4. It may also be put on your web site so that your customers can read it.

Would you write the same report in each of these cases? Surely not. The different readers will have different questions that they want answered. For example:

- Your manager may want to know how your current system compares to the alternatives.
- Your CEO may want to know about the impact on profitability in the current quarter.
- Your colleagues may want to know which product will be easiest to learn and use.
- Your customers may want to know if their information will be stored securely.

1.12 Report or proposal: readers first or writer first?

Business writing can be divided into two significantly different styles: You can write primarily to serve the needs of your *readers* or the needs of the *writer*. I contend that you must choose one or the other before you begin:

- **Reports** are written as an act of service in which you seek to satisfy the needs of your readers by answering their questions. Reports aim primarily to *inform* your readers.
- **Proposals** start with your own self-interest (or that of your department, company etc.). Proposals aim primarily to *persuade* your readers to do, want or believe something.

Given how different these objectives are, it is not surprising that reports and proposals are written in very different styles. It is thus *essential* that you decide which type of document you intend to write before you begin planning or writing.[4]

Let's consider an example. Your manager summons you to her office and tells you that she needs you to evaluate products A, B and C in terms of cost, quality and speed, each to be scored out of ten. Once done, you're to send her your findings along with a recommendation regarding which product you should use.

Here's the key question: Should this document be written as a report or a proposal?

If we accept the definitions provided above, this document is clearly a report. Why? Reports are primarily about answering your readers' questions. Here the questions (or *goals* of the report) could be phrased as:

For products A, B and C:

- How does each product rate on cost?
- How does each product rate on quality?
- How does each product rate on speed?

The primary purpose of this document is thus to answer those questions. Yes, there'll be recommendations at the end and, yes, they may be quite persuasive. The bulk of the document, though, would seem to involve providing (and justifying) answers to the questions above. Once that's done, the recommendations will be obvious; they'll follow naturally.

If, on the other hand, you were trying to persuade your manager to change from product X to product Y in order to improve profitability, you'd probably write a proposal. In it, you'd be less intent on answering questions and more intent on providing *benefits* associated with the change or describing *risks* associated with not changing. It would be a clear attempt at persuasion. Yes, it would also answer questions in an informative way. The bulk of the document, though, would be dedicated to building a persuasive argument.

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[4] This manual discusses report writing. For more information on proposal writing, see *Business Proposal Writing Made Easy* available here: www.scribe.com.au/ebooks.html.

So, how do you decide whether to write a report or a proposal? Ask yourself this question: *Who is the major beneficiary of this document: my readers or me?*

- If you're primarily seeking to altruistically serve the needs of your readers by answering all of their questions, approach the task as a report.
- If your writing starts by identifying your *own* needs (or that of your department, company etc.), approach it as a proposal.

Discussion

Does this distinction between reports and proposals seem reasonable?

1.13 What about objectives?

It's worth mentioning that many sources of advice on report writing talk about identifying your *objectives* for your report. In this chapter, I've suggested that you concentrate on identifying *readers' needs* instead.

Setting objectives may cause you to think in terms of what *you* need from the report. (*My* objectives are …). Whereas, concentrating on your readers' needs helps you to focus on what *they* need.

1.14 Checklist: getting started

Here is a checklist of steps to follow when you're first planning a new report:

Step	Done?
1. Be sure to identify when the report is due. Adjust your timeline accordingly.	❑
2. Identify the individuals or groups who will read your report	❑
3. For each of them, identify what questions they want answered.	❑
4. For each of them, identify a suitable level of technical detail.	❑
5. For each of them, identify how much they want from you.	❑
6. Identify if any of these needs are unachievable or are in conflict. If so, seek agreement on a more achievable set of needs.	❑
7. Congratulate yourself! You now have a clear idea of who your report is for, what each person or group needs, what level of language they'll understand and how much they want. This is a great start to any report.	❑

Why write an outline?

2

Writing is easy. All you do is stare at a blank sheet of paper until drops of blood form on your forehead.

Gene Fowler, 1890–1960

Rationale

- Without preparation, it is difficult to write a good report.
- Without feedback early in the writing process, you may waste time and effort.

Outcomes

You will be able to complete these tasks:

- Explain why it is essential to prepare an outline (a table of contents) before proceeding.
- Use your who-needs-what table to generate an outline.

would like the finance and engineering information centralised? If so, use the left-hand structure.

Or are they project managers who would prefer to have all of the information about each project together? If so, use the right-hand structure. Always let your readers' needs guide you.

2.4 I have an outline. What now?

Creating an outline before beginning the main writing task makes it easier for you to decide *what* needs to be written and in what *order* it should be presented.

Outlines provide other benefits as well. Let's say that you have three days to write a new report. You spend all of day one doing a thorough who-needs-what investigation. On the morning of day two, you take your outline (little more than a table of contents) and show it to a colleague. She suggests that you need to also cover topic X. You also take it back to one or two of the readers that you consulted during the who-needs-what process. One of them suddenly remembers that they'd also like you to write about topic Y. You make the necessary changes to the outline.

This early feedback will bring many benefits:

- Your report will be **more likely to be accepted** by those readers who have seen or commented on the outline.

  A 1998 study described a restaurant where 30% of customers who booked tables didn't show up. The owner dropped this no-show rate to 10% simply by having the receptionist change her request from 'Please call if you have to change your plans' to '*Will you* please call if you have to change your plans?'

  Why did this increase compliance so much? By waiting for the customer to reply, the receptionist *forced them to make a public commitment* to call if they changed their plans. Even a minor public commitment such as this influences people's future actions.

  If you can get your readers to approve an outline ('Yeah that looks good.') they're more likely to accept the final report than if they receive it without having pre-approved it in some way.

- You'll spend **less time writing** second (and subsequent) drafts as you're more likely to get it right with your first draft. Even when you factor in the time spent on the who-needs-what investigation, you'll probably come out ahead.
- You'll have **more free time** to spend on the part of your job that doesn't involve writing reports.
- You'll find the writing process to be **less stressful** as you'll be confident that you're doing the right thing.
- You'll **develop a reputation** as someone who gets it right the first time. This can be a real benefit to your career.

What Should be included? 3

Je n'ai fait celle-ci plus longue que parce que je n'ai pas eu le loisir de la faire plus courte.
(I have made this longer than usual because I have not had time to make it shorter.)

Blaise Pascal, "Lettres Provinciales" 1857.

Rationale

- Reports are expected to conform to certain structural conventions. If they don't, they may be rejected by your readers and/or viewed as amateurish.
- Conversely, reports that conform to people's expectations are more likely to be described as 'professional' and will be taken more seriously.

Outcomes

You will be able to complete these tasks:

- Structure your report so that it includes commonly expected headings.
- Include suitable and informative content under each heading.
- Explain why the executive summary is vital to the success of your report.
- Write an executive summary that conveys all the essential information and encourages readers to read the rest of the report.
- Write a background section that provides the necessary context for readers.
- Write effective conclusions and recommendations.
- Decide what information should be confined to appendices.
- Explain the importance of including references within your reports.

Guideline one: Identify the report's goals

Your executive summary should usually start with an explicit list of the *goals* of your report. (This explicitly answers the question: *What* is this report about?) Identifying your report's goals won't be difficult, as the goals will have been given to you during your who-needs-what investigation.[6] They will have come from the needs of your readers. Alternately, your goals may have been written for you by a manager or a client.

Listing the goals of your report identifies the areas to which the report pertains. It also helps to identify its audience by telling readers if their areas of interest will be covered.

The report's goals are best presented in a bulleted or numbered list as this draws attention to them. Key words and phrases can also be hyperlinked to further draw the reader's attention. For example:

> The goals of this report are as follows:
>
> 1. Identify the cause (or causes) of the recent generator failure.
> 2. Describe ways to avoid such failures in future.

Writing clear goals is so important that it's discussed separately in the next section.

Guideline two: Identify why the content is important to the reader

Saying why the content of the report is important gives the reader greater motivation to read on. For example, any of the following *bait statements* in an executive summary may make a reader more likely to continue reading:

> Page four of the report identifies ways to lower monthly costs by 8–10%.
>
> Risks associated with our current choices are discussed in Section two.
>
> Opportunities for highly profitable expansion are discussed in Section 3.1.
>
> The possible consequences of not acting promptly are described on page eight.

Note how the examples above all contain hyperlinks and/or references to a location within the report ('page four', Section two'). This makes it easy for the reader to turn to the appropriate page and continue reading.

Tell people why your report is important to them, and tell them early. Don't make them guess.

Consider this opening from the executive summary of a consultant's report:

[6] See sections 1.8 and 2.2.

How do I present my report? 4

Style is a magic wand, and turns everything to gold that it touches.

Logan Pearsall Smith, AFTERTHOUGHTS, *1931.*

Rationale

- Documents that are neatly and consistently formatted look professional and credible. Documents that aren't can appear amateurish.
- Documents that appear amateurish may not be taken seriously even if they contain good content.
- There are accepted (if vague) conventions for formatting headings, captions and tables. If you're unaware of these, your work can look amateurish.
- Tables of information can be difficult to read if not formatted neatly. Conversely, neat formatting can make the information presented in them more readable.

Outcomes

You will be able to complete these tasks:

- Create suitable heading hierarchies.
- Format headings in a credible and consistent style.
- Choose a font that maximises legibility.
- Choose and apply a line spacing that maximises the legibility of your work.
- Explain why business email should be written professionally, not informally.
- Correctly place and format captions.
- Format tables in a neat style.

Avoid single subheadings

Consider this outline for a document:

Chapter 2: Background

2.1 Situation

Several paragraphs of text

2.2 Solution

Several paragraphs of text

Chapter 3: Analysis

3.1 Data

Several paragraphs of text

Chapter 1 is subdivided into two parts by its two level-2 headings (‘Situation’ and ‘Solution’). This is a reasonable structure.

Chapter 2, though, has only a single subheading (‘Data’) that spans the entire chapter. This subheading seems unnecessary as it spans the same text as the level-1 heading (‘Analysis’).

It may be preferable to remove the subheading so that the chapter has no level-2 heading. Alternately, one or more additional level-2 headings could be created; for example:

Chapter 3: Analysis

3.1 Historical data

Several paragraphs of text

3.2 Current data

Several paragraphs of text

If a chapter contains level-2 headings there should be a minimum of two of them. Similarly for level-3 and deeper headings.

Be consistent with heading levels

Consider the following extract from a table of contents:

Chapter 7: SWOT analysis

7.1 Introduction

7.2 Strengths

7.2.1 Weaknesses

7.3 Opportunities

7.4 Threats

Essential punctuation

5

"I should probably feed my sisters cats."

artifice401.blogspot.com/2009/06/importance-of-punctuation.html

Rationale

- Properly used, punctuation can aid the clarity of what we write. Omitted, our writing can be ambiguous.
- There are accepted conventions for how to punctuate. If we are unaware of these, our writing can look less professional.
- In legal documents and technical specifications, poor punctuation can have serious ramifications.

Outcomes

After completing this chapter, you'll be able to:

- Employ widely followed conventions for correct punctuation.
- Use punctuation to avoid ambiguity.

Further reading

The Style Manual for Authors, Editors and Printers (6th edn, 2002), John Wiley and Sons.

5.1 Why should I care about punctuation?

Punctuation is used to make our meaning clearer. Without punctuation — or with incorrect punctuation — the meaning of what we write can be unclear to our readers. This may cause problems for everyone.

Reason to care about punctuation #1:

Imagine that you use your phone to send the following short (and lamentably unpunctuated) message to a loved one during your lunch break:

> You know I'm sorry I still love you

You may be expecting to go home to a cooked meal and a bit of a cuddle because *you* think that you sent the heartfelt apology:

> You know I'm sorry. I still love you.

To your surprise, you come home to find your clothes on fire in the middle of the lawn! Unfortunately, your partner read the same message as bitter statement of regret:

> You know, I'm sorry I still love you.

It's to avoid disastrous confusion like this that we need to know how to punctuate.

Reason to care about punctuation: #2:

Here's another example that also shows how punctuation can change the meaning of a sentence. In this case, though, the change in meaning is quite subtle:

> The house which Jack built is over here.[18]

> The house, which Jack built, is over here.

The first sentence implies that Jack has built only one house. The second doesn't. You can see that we need to punctuate well in order to avoid subtle distinctions like this.

Reason to care about punctuation #3 (the scary one):

In business, missing or improper punctuation (for example, in a contract, tender or specification) has given rise to serious legal and financial problems. For example:

> A contract dispute in Canada centers on what's being called a million-dollar comma. Canada's telecommunications regulator has decided that a misplaced comma in a contract concerning telephone poles will allow a company to save an estimated $2 million (Canadian).
>
> www.npr.org/templates/story/story.php?storyId=6383383

---

18 Readers with a sound knowledge of grammar will note that the *subject* of the first sentence (underlined) is different from the subject of the second.

Table 5.1: A summary of the five ways to join small sentences.

	Joining words	Punctuation	Example
1.	[none]	Sentence**.** Sentence**.**	Today is Friday. Tomorrow is Saturday.
2.	[none]	Sentence**;** sentence**.**	Today is Friday; tomorrow is Saturday.
3.	accordingly consequently for example furthermore however moreover namely nevertheless otherwise therefore that is thus	Sentence**;** [joining-word]**,** sentence**.**	Group three succeeded; however, group four did not. I like it; nevertheless, I won't be buying it. It's very expensive; nevertheless, it's worth it.
4.	for and nor but or yet so	Sentence**,** [joining-word] sentence**.**	Group three finished, but they took a long time. I like it very much, and I think you will too.
5.	because as if then	Sentence [joining-word] sentence**.**	Complete this work then email it to me. He is happy because he got a promotion.

Exercises

Punctuate these sentences:

1. I like this and would like to buy it.
2. I like this and I would like to buy it.
3. Johnson is a good team member but he may lack initiative.
4. Johnson is a good team member but lacks initiative.
5. Finish this work then meet me down at the bar.
6. I admire her because she's a hard worker.

Capitalisation

6

Capitalisation is the difference between "I had to help my Uncle Jack off a horse" and "I had to help my uncle jack off a horse".

UrbanDictionary.com

Rationale

- There are accepted conventions for when to use (and not to use) a capital letter at the start of a word. If we are unaware of these, our writing can look less professional.
- Contemporary usage employs fewer capital letters than in the past.
- As the quotation above demonstrates, incorrect capitalisation can even change the meaning of a sentence.

Outcomes

After completing this chapter, you'll be able to:

- Explain why it is unwise to overuse full capitals.
- Choose a suitable style for capitalising headings and titles.
- Identify when to use an initial capital letter and when not to.

Further reading

The Style Manual for Authors, Editors and Printers (6th edn, 2002), John Wiley and Sons.

6.5 Headings and titles

Ways of capitalising headings and titles

Four capitalisation styles are in common use:

1. THIS LINE IS IN *FULL CAPITALS.*
2. This Line Has A Capital For Every Word.
3. This Line is in *Title Case.*
4. This line is in *sentence case*.

There is no clear agreement on how to capitalise headings and titles within a document. Some authors consistently use their preferred style. A considerable number use several, often in the same document.

The use of full capitals for headings and titles is inadvisable as this can be associated with a loss of readability as outlined in the previous section. Similarly, using a capital letter for every word has traditionally been frowned upon. This leaves us with two common choices.

In *sentence case* one uses a capital for the first word of a heading or title. Other words start with a lower-case letter unless they would normally receive a capital; for example, a person's name. The biggest advantage of sentence case is simplicity. Authors don't have to ponder which words to capitalise and which not to.

In *title case* most words are written with an initial capital. Certain small words are not capitalised, though. While title case is commonly used, its biggest drawback is that most authors are unsure as to which words should not be capitalised. This leads to inconsistency.

If you decide to use title case, it is common not to capitalise these classes of words:

- conjunctions (*and, or, but*);
- prepositions (*in, of, by, for)*;
- articles (*a, an, the)*; and
- any form of the verb *to be* (*is, are, am*).

It should be noted that Microsoft Word's *Change Case* command doesn't have a setting that correctly implements title case as it is defined here, so you have to do this manually. Wouldn't it just be easier to use sentence case?

There has been a trend throughout the twentieth century towards the use of fewer capital letters than was the case in previous centuries. The use of sentence case is consistent with this long-term trend, though this is not cause to reject title case if you prefer it.

Discussion

- What are your preferences in this regard?
- Does your organisation have a style sheet that specifies a capitalisation style to be followed? If not, are you in a place to create such a style sheet? (Who is?)

Shortened forms

7

The good writing of any age has always been the product of someone's neurosis, and we'd have a mighty dull literature if all the writers that came along were a bunch of happy chuckleheads.

William Styron, WRITERS AT WORK, *1958.*

Rationale

- There are accepted conventions for how to use abbreviations, contractions, acronyms and symbols correctly. If we are unaware of these, our writing can look less professional.
- The correct use of the metric system of units is the subject of much confusion.
- The overuse of acronyms can lead to a loss of clarity.

Outcomes

After completing this chapter, you'll be able to:

- Distinguish between abbreviations, contractions, acronyms and symbols.
- Know when to use capital letters and full stops in these shortened forms and when not to.
- Correctly write numbers and units using the metric system.
- Employ strategies to prevent the overuse of acronyms.

Further reading

THE STYLE MANUAL FOR AUTHORS, EDITORS AND PRINTERS (6th edn, 2002), John Wiley and Sons.

Bulleted and numbered lists 8

I have a little list.

Gilbert and Sullivan, The Mikado, *1885.*

Rationale

- Bulleted and numbered lists can be confusing if worded poorly.
- There are accepted conventions for how to present bulleted and numbered lists. If we are unaware of these, our writing can look less professional.

Outcomes

After completing this chapter, you'll be able to:

- Format bulleted and numbered lists for maximum clarity.
- Punctuate bulleted and numbered lists correctly.
- Employ what is known as *parallel structure*.
- Decide when to use bullets and when to use numbers.

Further reading

The Style Manual for Authors, Editors and Printers (6th edn, 2002), John Wiley and Sons.

8.1 How should I punctuate a list?

Type 1: Lists of fragments

If the elements of a bulleted or numbered list do not form complete sentences then a commonly seen contemporary style is to punctuate them as follows:

Training contributes to organisational effectiveness through:

- correcting skill deficiencies
- developing a flexible and adaptable workforce
- increasing employee commitment and job satisfaction
- increasing productivity
- increasing adaptability
- providing competitive advantage.

Notice the colon after the introduction and the full stop after the final item. The individual fragments all start with lower-case letters

A more traditional style includes semicolons (;) at the end of the fragments and the word *and* between the final two:

Training contributes to organisational effectiveness through:

- correcting skill deficiencies;
- developing a flexible and adaptable workforce;
- increasing employee commitment and job satisfaction;
- increasing productivity;
- increasing adaptability; and
- providing competitive advantage.

Whichever your preferred style, remember to be consistent.

The punctuation of the examples above becomes clearer when you realise that the entire list is a *single sentence.* It has a single capital letter at the start (*Training* …) and a single full stop at the end.

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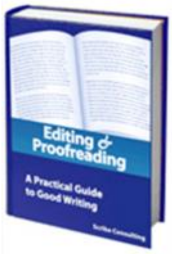

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