

COMPREHENSIVE TRAINING ON MS EXCEL &
REPORT WRITING TRAINING



Business Report Writing Techniques



Marvy Okoro
Facilitator

Powered by:



In partnership with:



contents

SESSION 1

❖ Learning Objective

❖ Getting Started

- Introduction
- Purpose of Business reports
- Features of a good business report
- Classification of Business reports
- Types of Business Report
- Business Report Writing Process
- Business Report writing Approach

❖ Planning

- Report Structure and Components

❖ Researching

- Business Report Research Method
- Business Re

SESSION 2

❖ The Writing

- Writing Techniques & styles

❖ Learning Objective

- Drafting the Business report
- Revising and editing

SESSION 3

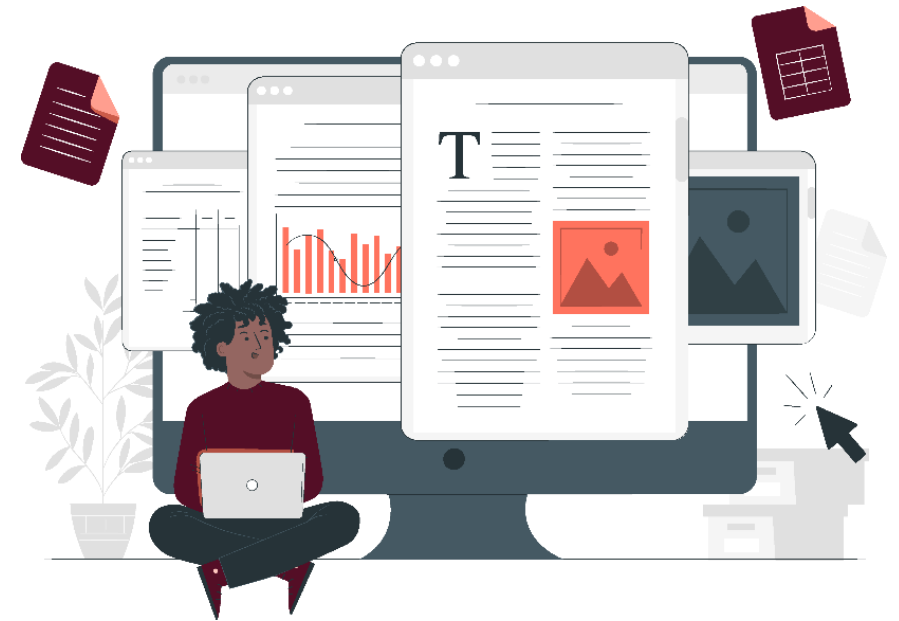
❖ Practical Exercises

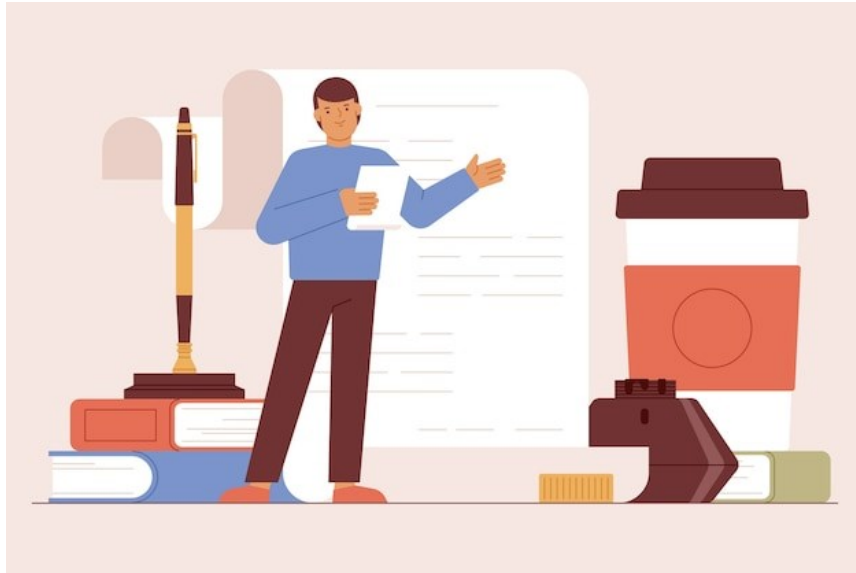
- Analyzing sample business reports
- Individual Assignments
- Writing short business report on a given topic
- Group writing activities
- Collaborative report writing
- simulating real world business scenarios
- Receiving and incorporating feedback

Learning objectives

After the session, you should be able to:

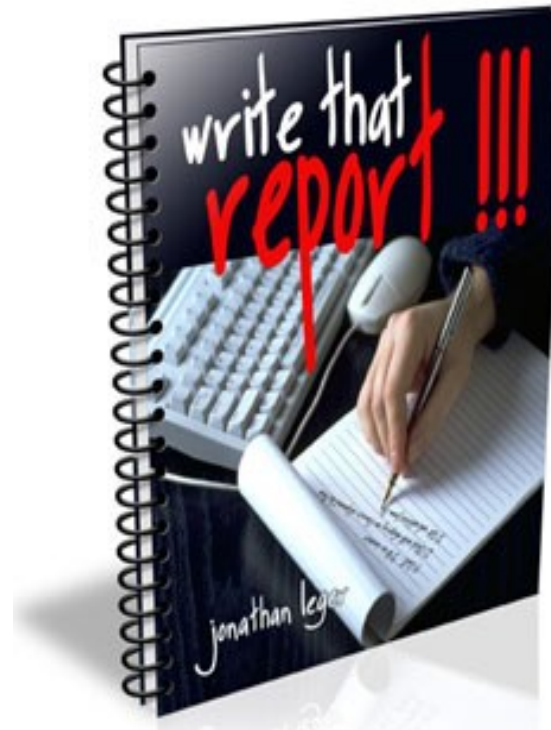
- ❖ Understand the purpose of business report and impacts
- ❖ Understand the fundamentals and best practice writing principles
- ❖ Know the types of business reports
- ❖ Understand the structure and components of business report
- ❖ Understand practical approach to report writing
- ❖ Understand how to research and plan a report
- ❖ Collect information for report
- ❖ Organize your information
- ❖ Use an appropriate writing techniques and style of writing
- ❖ Present data effectively
- ❖ Understand how to lay out information in an appropriate way





Getting Started

Does this look familiar?



INTRODUCTION

WHAT IS A REPORT?

A report is a statement of the results of an investigation or of any matter on which definite information is required. (Oxford English Dictionary)

A report is a piece of factual writing based on evidence containing organized information on a particular topic.

A report is a Presentation of facts for the purpose of: Evaluation by others, Decision Making, Informing Others

WHAT IS REPORT WRITING?

Report writing, therefore, is writing information to someone for his /her use.

WHAT IS A BUSINESS REPORT?

Business report is a **presentation of information**, usually in **written form**, **directed to** a particular reader or readers, to **achieve a specific purpose**.

Business Reports support actions we believe Management/our readers should take.

PURPOSE OF BUSINESS REPORTS



- ❖ Report provide Information update
- ❖ Report discloses unknown information.
- ❖ Report make recommendation
- ❖ Report give an analysis of facts
- ❖ Report as a means of internal communication.
- ❖ Report facilitates decision making and planning

FEATURES OF GOOD BUSINESS REPORT

6 Cs of GOOD REPORTS



- **Clear:** message is clear, relevant, specific, no jargon, logical flow of information, not too many points at once, main point up front, easy to understand, no ambiguities.
- **Concise:** short to the point, no waffling or padding, short words, sentences and paragraphs this increases impact.
- **Complete:** identify what is main, supporting, or irrelevant information, include everything the receiver needs to know, think ahead and anticipate what the receiver will need or want to know.
- **Correct:** facts, language, communication fits receivers' needs and wants.
- **Courteous:** people do business with people they like, be polite, friendly, especially in difficult situations.
- **Coherent:** facts, language, communication fits receivers' needs and wants.

FEATURES OF GOOD BUSINESS REPORT

READERSHIP ANALYSIS – (A-B-C)



Technical/Subject matter expert needs: **ACCURACY** A report must be accurate and factual.

Approving Authority (Non-technical) needs: **BREVITY** A good report must not be too long. A writer should not explain the same point more than once, not being sure that the meaning was clear at the first attempt.

Implementer/functionary needs:

CLARITY The information contained in a report should be direct and straight forward and should be able to capture the message intended.

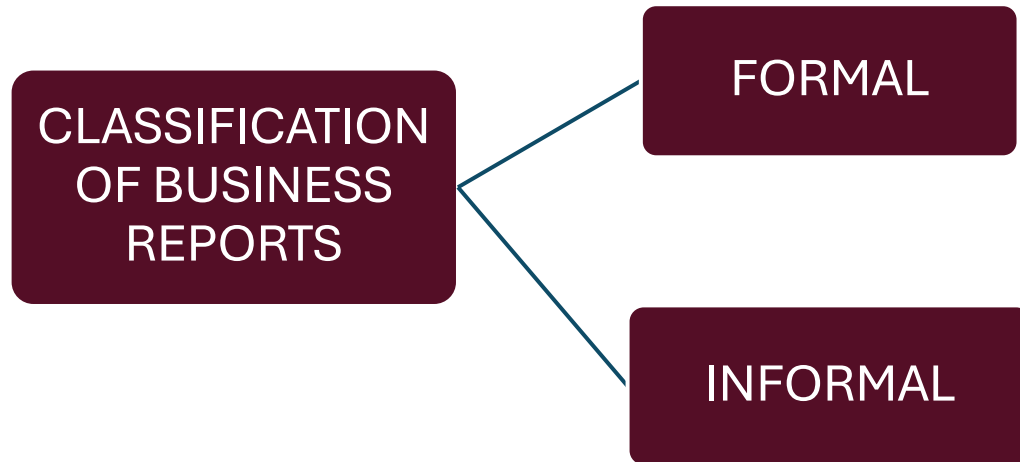


Exercise

You were in charge of organizing your departmental week as the president of your departmental union.

You recorded a lot of progress during the week and encountered a lot of problems too. Write a report on the departmental week stating the progress, problems and recommendations for improvement.

CLASSIFICATION BUSINESS REPORTS

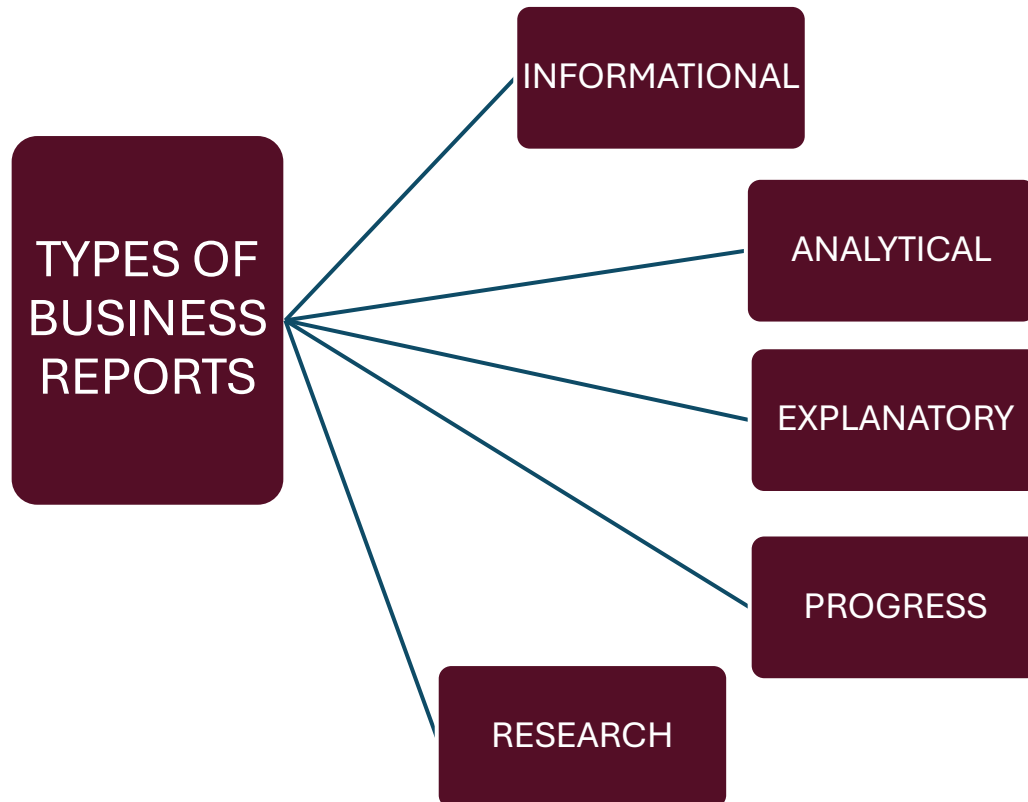


Both of these are further broken down by the type of information they contain

Formal report is usually the result of a thorough investigation a problem , condition or situation . Formal reports are comparatively longer and need to elaborate description and discussions .The length of report – A few pages to hundreds of pages. *E.g. Feasibility study, proposals, investigation and evaluation*

Informal report is generally brief and direct and can be delivered in email or memo format. It is be used to share important information with one person or a small group of people. It is written to provide introductory information about a routine affair .

TYPES OF BUSINESS REPORTS



Informational Reports: They are functional reports that presents facts , data , feedback and other type of information without any analysis , interpretation or recommendation. The function of the writer is to collect , compile and organize facts for the reader. e.g. conference reports , seminar reports , trip reports etc. (It's a telling report)

Analytical Report: Analytical report provides data , facts , feedback and other type of information with analysis , interpretation or recommendation. Recommendation is the biggest difference between informational and analytical report. E.g., project report , market research report , feasibility report etc. (It's a selling report)

Research Report: Research Report is a written document that presents the results of a research project or study, including the research question, methodology, results, and conclusions, in a clear and objective manner.

Explanatory Report: An explanatory report is a type of report that explains an individual project to the entire team¹. It showcases the facts, lists the findings, and determines the conclusion of the research

Progress Report: A progress report is a vital tool in project management, designed to keep various stakeholders informed about the ongoing status of a project. It's a concise document highlighting current achievements, challenges, and goals, allowing the project manager to track progress and make necessary adjustments.

BUSINESS REPORT WRITING APPROACH

Business report is a **presentation of information**, usually in **written for**, **directed to** a particular reader or readers, to **achieve a specific purpose**.

A. PRESENTATION OF INFORMATION

1. Informing - so that reader “knows”
2. Convincing - so that reader “believes”
3. Motivating - so that reader acts in the desired way

B. DIRECTED TO A PARTICULAR READER/READERS.

1. The Audience/recipient must be known

C. TO ACHIEVE A SPECIFIC PURPOSE.

1. State the purpose of the report
2. Include what the report will recommend

Use Case I

Bosun has spent two weeks examining his company's methods for ordering, receiving, storing, and issuing parts for the electronic equipment the company services. He has discovered that the inventory control system is inefficient and has investigated alternative methods and devised a better system. Now he is ready to write a report describing his findings and suggestions.

He is having trouble getting started. When he sits down to write, he just can't seem to find the right words. He writes a few sentences, and sometimes several paragraphs, yet each time he discards them. He is frustrated because he is unable to bring his message into focus. Bosun's problem is not unusual. It stems from a simple omission: he has neglected to give sufficient thought either to his reader or to the message he has to convey. He needs to answer 4 critical questions before he picks up his pen or places his fingers on the computer keyboard.

BUSINESS REPORT WRITING APPROACH

1. WHO IS MY READER? (IDENTIFYING THE READER)


It is the person (or people) who will probably use or act upon the information you provide. A few questions to note:

1. What does the reader want, expect, or need to hear from me
2. How much does the reader know already?
3. What effect do I want my report to have on the reader?
4. Are other people likely to read my report?

2. WHAT DO I MOST WANT TO TELL MY READER? (IDENTIFYING THE MESSAGE)

His aim should be to find key information that will spark readers interest so they will want to know more.

1. The company's supply system is out of date and inefficient?
2. Other businesses Bosun has investigated have better supply systems?
3. There are several ways the company's supply system can be improved?
4. Improvements to the company's supply system will increase efficiency?
5. Changes to the supply system will save time and money



In business reports readers want to find the Main Message at the beginning!

Use Case I ...ctnd

Bosun had figured that that his primary reader is Madam Evelyn, who is Manager of Purchasing and Supply. He also recognizes that Evelyn may circulate his report to other managers like the MD. He also needs to consider these secondary readers. He must examine the results of his investigation and decide which results will be most useful to Evelyn and other readers . His aim should be to find key information that will spark her interest so she will want to know more.

Bosun reasons that Evelyn will be most interested in knowing how to save the department time and money. As increased efficiency is the key to these savings, so he decides what his **Main Message will be:**
“Improvements to our inventory control system will increase efficiency and save time and money”

BUSINESS REPORT WRITING APPROACH

3. WHAT WILL THE READER DO WITH THE INFORMATION?

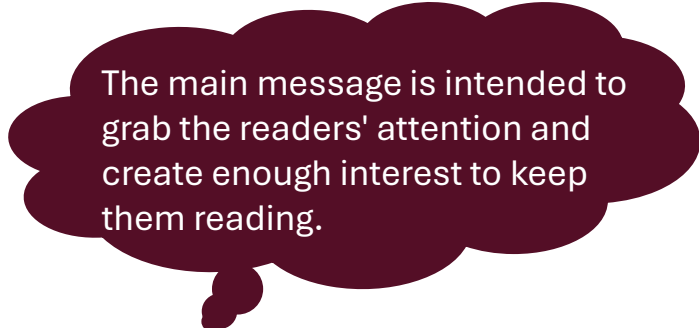
In developing the details, you need to know Say to yourself: If I were the intended reader, which questions would I ask after I had read only the Summary Statement?

- Why (is it necessary to increase efficiency)?
- How (can we improve efficiency)?
- What (will be the effect or result of improved efficiency)?
- When (should the improvements be implemented)?
- Who (will be affected by them)?
- How (much will it cost)?
- Where ? – For this scenario; where is not relevant

4. WHAT IS THE DEADLINE DATE FOR THE REPORT AND FOR TENTATIVE IMPLEMENTATION OF THE REPORT SOLUTION

Use Case I ...ctnd

Because Bosun recognizes that Evelyn may circulate his report to other managers or to the vice president of the division, he uses a language that is appropriate to these secondary audiences. For example, he includes information to help managers understand the situation and make decisions but leaves out many of the technical details and findings. They would be used to justify or prove his recommendation and could be presented as attachments. He will also need to add details, evidence and facts to his report to help the readers reach a conclusion of decision



The main message is intended to grab the readers' attention and create enough interest to keep them reading.

BUSINESS REPORT WRITING APPROACH

1. WHO IS MY READER? (IDENTIFYING THE READER)

It is the person (or people) who will probably use or act upon the information you provide. A few questions to note:

1. What does the reader want, expect, or need to hear from me
2. How much does the reader know already?
3. What effect do I want my report to have on the reader?
4. Are other people likely to read my report?

2. WHAT DO I MOST WANT TO TELL MY READER? (IDENTIFYING THE MESSAGE)

His aim should be to find key information that will spark readers interest so they will want to know more.

1. The company's supply system is out of date and inefficient?
2. Other businesses Dave has investigated have better supply systems?
3. There are several ways the company's supply system can be improved?
4. Improvements to the company's supply system will increase efficiency?
5. Changes to the supply system will save time and money

Use Case II

Recently, Kevin drove to a warehouse to determine the condition of some new equipment damaged in a traffic accident and found that most of it was beyond repair.

He has also Identified who will be reading the reports and the recommendation to make and the decision he hopes will be taken as an outcome of the report.

In the Summary Statement of the report Kevin told her readers what they most needed to know: **Main Message:** (1 want to tell you that...) Our inspection shows that only three of the 16 computers in LP Computer Systems' shipment No. 367 can be repaired. The remainder will have to be scrapped.

He the goes ahead to apply the report writers pyramid model to build the details of his report.

BUSINESS REPORT WRITING APPROACH

3. WHAT WILL THE READER DO WITH THE INFORMATION?

In developing the details, you need to know Say to yourself: If I were the intended reader, which questions would I ask after I had read only the Summary Statement?

- Who (was involved)? *Bisade and Abubakar*
- Why (were you involved)? *We had to inspect damaged computers. (Authority: Arlington Insurance Corporation)*
- Where (did you go)? *To LP Storage warehouse*
- When (did this happen)? *On August 18*
- What (did you find out)? *Three repairable computers, 13 damaged beyond repair*
- How (were they damaged)? *In a semitrailer involved in a highway accident*

4. WHAT IS THE DEADLINE DATE FOR THE REPORT AND FOR TENTATIVE IMPLEMENTATION OF THE REPORT SOLUTION

Use Case II ...ctnd

Finally, Kevin took these bare facts and shaped and expanded them into two Detail paragraphs.

Details:

Why?	We were requested by Arlington Insurance Corporation to examine the condition of 16 CANFRED computers manufactured by Calvin Computer Systems of Austin, Texas. They were damaged when the semitrailer in which they were shipped overturned and burned on a curve near Jackson, Mississippi, on June 11. Patrick and I drove to Jackson on June 18, where we were met by Arlington Insurance Corporation representative Kevin Cairns.
How?	
Where?	
When?	
Who?	
What?	He escorted us to the LP Storage warehouse. We found that the fire that resulted from the accident has irreparably damaged 13 computers. Three others suffered smoke damage but seem to be electronically sound. They carry serial numbers 106287, 106291, and 106294. We estimate that these computers will cost an average of \$350.00 each to repair, for a total repair cost of \$1050.00.

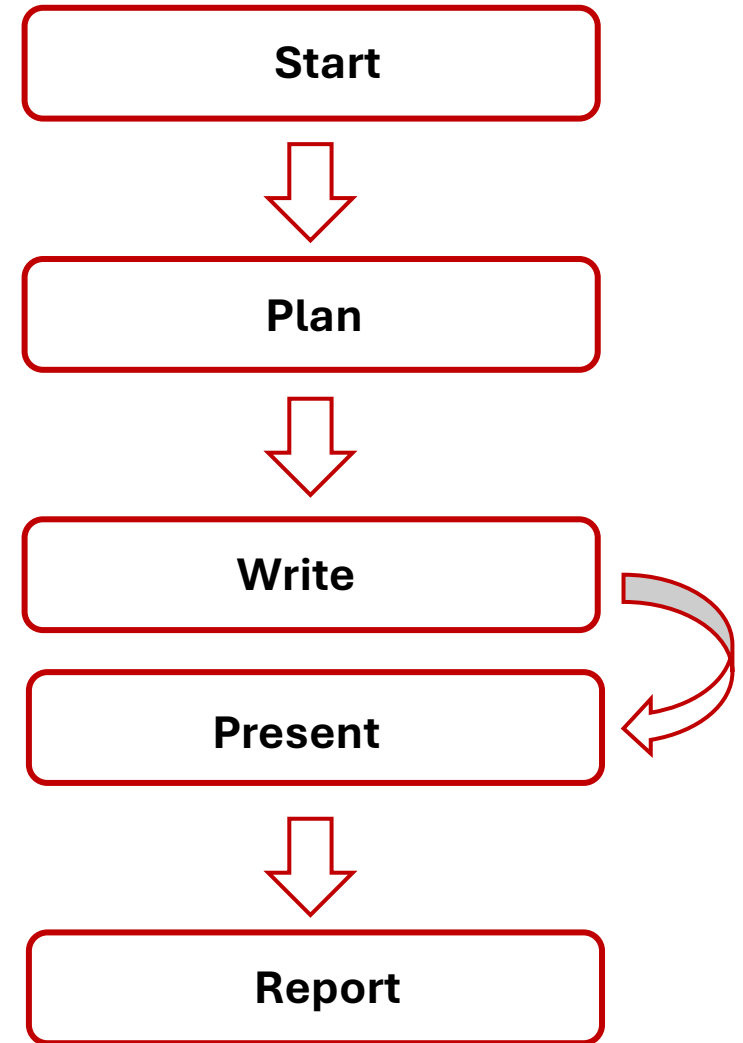
BUSINESS REPORT WRITING STAGES

- Step 1:** Planning
- Step 2:** Researching
- Step 3:** Organization

Thinking (80%)

- Step 4:** Writing the first draft
- Step 5:** Quality Assurance
- Step 6:** Submit final draft for approval and adoption

Inking (20%)



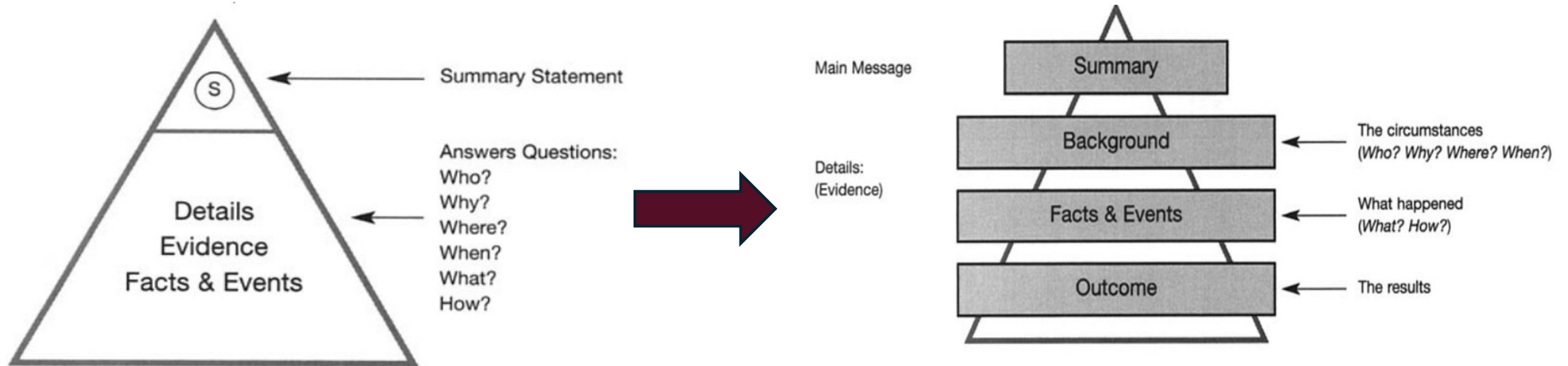
BUSINESS REPORT
WRITING STAGES

**STEP 1:
PLANNING**



BUSINESS REPORT STRUCTURE & COMPONENT

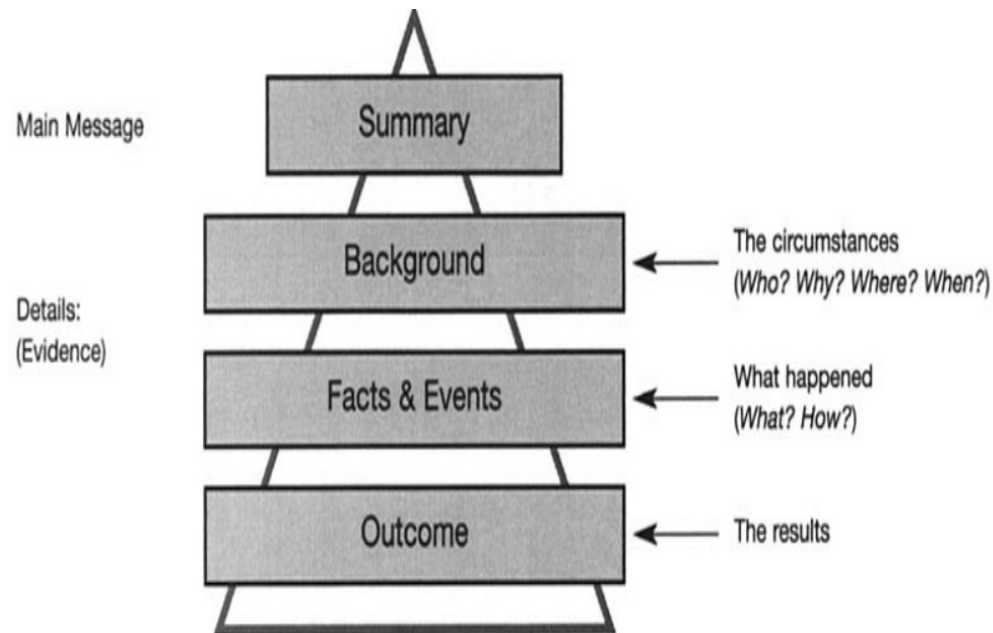
THE REPORT WRITERS PYRAMID



- **A Background** compartment, which describes the circumstances leading up to the situation or event. (It answers the questions: who?, why?, where?, and when?)
- **A Facts & Events compartment**, which describes in detail what happened, or what you found out during your project. (It answers the last two questions: what? and how?)
- **An Outcome compartment**, which describes the results of the event or project, and sometimes suggests what action needs to be taken. (It also can answer the questions what? and how?)

BUSINESS REPORT STRUCTURE & COMPONENT

THE 4 COMPARTMENTS SUMMARY



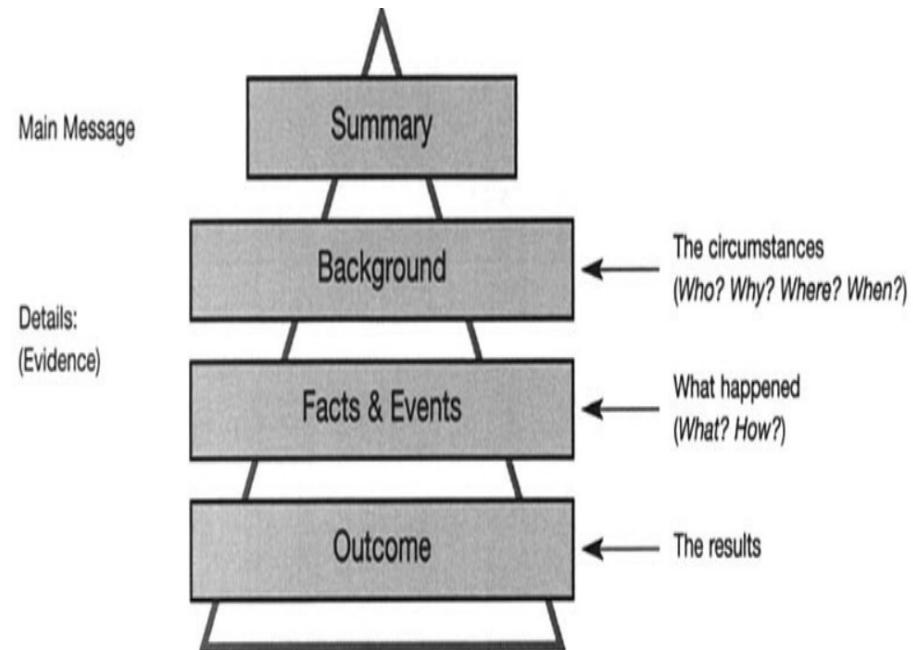
Summary, Background Facts & Events Outcome provide the basic framework for every report you are likely to write. You will be able to identify them in every report although often you will find the compartments are relabeled to suit particular situations.

In longer reports the compartments are also subdivided to accommodate more information and to improve internal organization. These subdivisions occur mostly in the Facts & Events compartment.

In a long report, the different sections within the report can also be structured as individual pyramids, so that smaller pyramids are nested within the overall pyramid

BUSINESS REPORT STRUCTURE & COMPONENT

THE REPORT WRITERS PYRAMID - NOTES



The base of the report writer's pyramid answers readers' questions.

- You can arrange the answers in any sequence you like, balancing your personal preference against the reader's needs and the most suitable way to present your information.
- Only the appropriate questions need to be answered (i.e. the questions that are pertinent to each reporting situation).
- The first four questions in the list (who?, why?, where?, and when?) require straightforward answers. The last two questions (what? and how?) can have widely varying answers, depending on the event or situation you are reporting.
- Consequently, there is ample scope for originality and ingenuity on your part.

BUSINESS REPORT WRITING STAGES

STEP 2: RESEARCHING



BUSINESS REPORT RESEARCH PROCESS

STEP 1: DEVELOP A DATA COLLECTION PLAN/STRATEGY

STEP 2: DATA COLLECTION

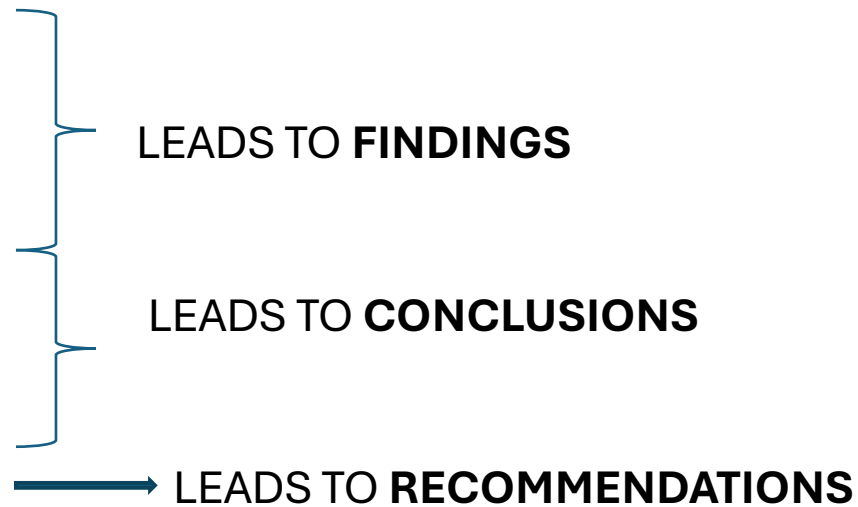
STEP 3: DATA COLLATION

STEP 4: DATA ANALYSIS

STEP 5: DATA INTERPRETATION

STEP 6: VERIFICATION

STEP 7: PUBLICATION



BUSINESS REPORT RESEARCH METHODS

QUANTITATIVE – NUMERIC E.G. STATISTICS

QUALITATIVE – SUBJECTIVE E.G. SURVEYS AND FOCUS GROUPS

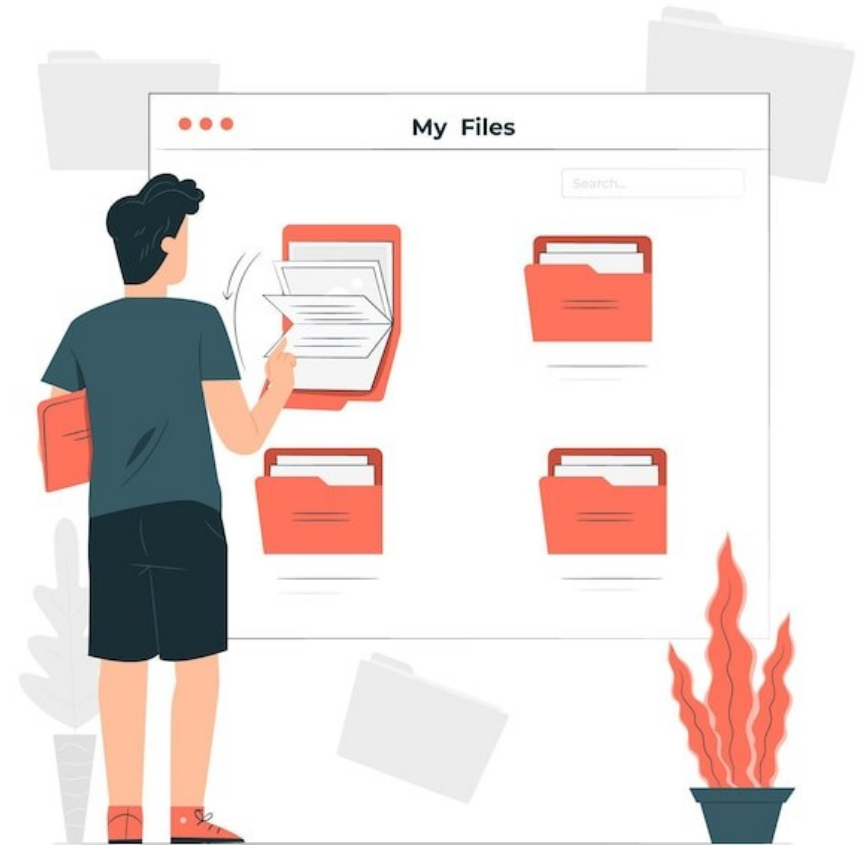
SOURCES OF DATA:

- ✓ *ELECTRONIC*
- ✓ *DOCUMENTARY*
- ✓ *EXPERIMENTAL*
- ✓ *HUMAN*



BUSINESS REPORT WRITING STAGES

STEP 3: ORGANISING



THE ICEBERG



PRESENTATION

5 %

SEA LEVEL

**INVISIBLE
BELOW SEA LEVEL**

RESEARCH

95 %



**KNOWLEDGE
&
SKILLS**

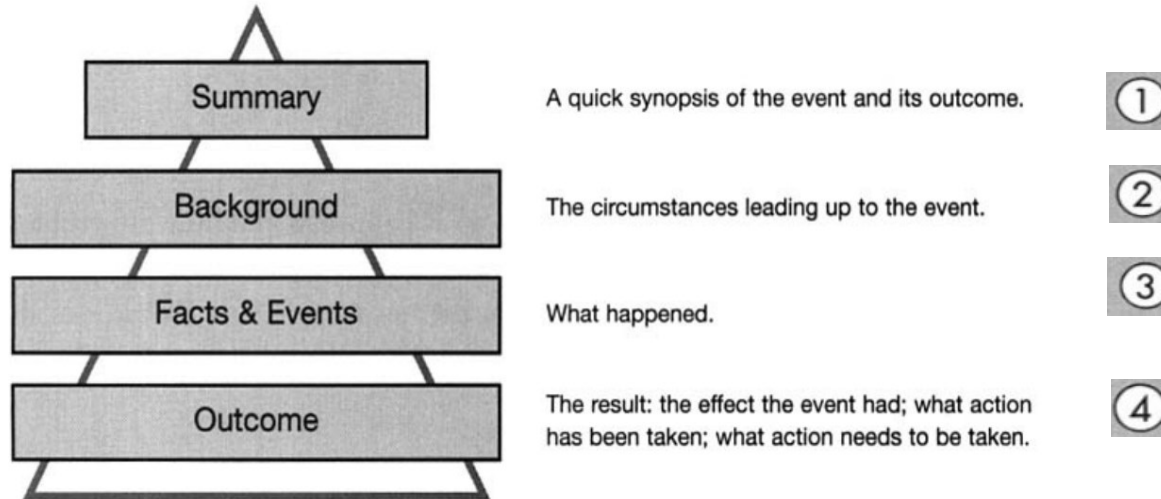
ORGANISING



ATTITUDE

BUSINESS REPORT WRITING TECHNIQUE -STRUCTURE

INFORMAL REPORTS – Incident Reports



Examples Type 1

- Incident reports (occurrence or accident report) eg. reporting a project delay
- Field Trip reports
- Inspection Reports

Examples Type 2:

- Progress Reports
- Project Completion Reports
- Short Investigation Reports

Use Case I – Incident Report

INTEROFFICE MEMORANDUM

TO: Dwight Murray DATE: October 13, 2002
FROM: Mark Kagle SUBJECT: Effect of Power Outage on Project Taurus

① An electrical blackout last night interrupted the Project Taurus data transmission tests. This will increase project costs by \$2380 and delay the project completion date a further 48 hours.

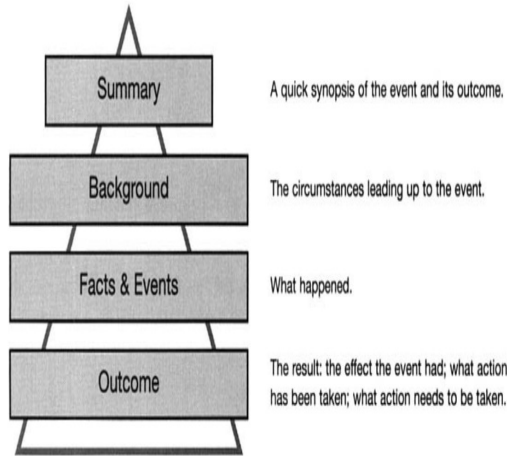
② The tests require continuous transmission of data at 56,000 baud for 24-hour periods over fiberoptic transmission lines ranging in length from 5.6 to 224.3 miles. The tests are being performed for the Waverly Power Commission under contract WTS1771, and were to be completed by October 15, 2002.

③ The power outage was caused by lightning that disabled three transformers at Wickens Peak power station at 21:17 on October 12. The outage lasted for 3 hours 18 minutes. The lightning strike also created a momentary power surge which damaged two Vancourt 1800 computers we were using for the tests.

④ I have arranged for two replacement computers to be delivered tomorrow morning, October 14, and will be bringing in additional shift technicians—both here and at the eight receiving points—to work the nights of October 15 and 16. I have also informed Waverly Power Commission that Project Taurus will not be complete until October 17.

BUSINESS REPORT WRITING TECHNIQUE -STRUCTURE

INFORMAL REPORTS – Field trip



Summary ①

Assignment Details:

Purpose

Authority ②

Personnel

Location

Duration of Trip

(Background)

Who went where why and when?

Assigned Work Completed ④

Problems Encountered ⑤

Additional Work Done ⑥

(Trip Activities) ③

What? -Installations, modifications, repair work

Results Achieved ⑦

Follow-up Action Required ⑧

(Outcome)

Use Case II – Field trip

Frank Crane is a field service representative for Vancourt Business Systems Inc. He is reporting an installation he has just completed to his company's R&D Manager, Dale Rogerson.

Vancourt Business Systems Inc.

TO: Dale Rogerson, Manager
Research and Development

DATE: October 23, 2002

FROM: Frank Crane, Field Service Rep.

SUBJECT: Installation of Prototype Modification Kit MCR-1

① An MCR-1 multi-account readout display and control box have been installed on a model 261 Processor, where they will be field-tested for three months.

② I was assigned by Work Order M97 to install the prototype kit on a processor owned by Arrow Industries at Westland, Ohio, where arrangements have been made for it to be field-evaluated. Modification kit MCR-1 permits raw data on individual accounts stored in Vancourt 261 Processors to be made instantly available on a miniature display unit mounted beside the processor. I drove to Westland on October 19 and returned on October 22.

③ The circuit and control box were installed without difficulty. However, a locally manufactured equipment rack on which the 261 Processor has been mounted prevented me from installing the miniature display beside the processor, as directed in step 29 of the installation specification.

④ I arranged for the mounting tray to be modified by Corwin Metals in Westland, so that it could be mounted on top of the processor as shown on the attached diagram. Corwin Metals's invoice for \$246.25 is attached.

⑤ During post-installation tests I detected and corrected two minor display faults. I then tested the installation operationally for three hours, but detected no further faults.

⑥ During this period I trained three employees of Arrow Industries to use the equipment.

⑦ Their contact employee is Lara Carter (one of the three persons I trained), with whom I have left evaluation and serviceability status report forms. She will mail these to you weekly.

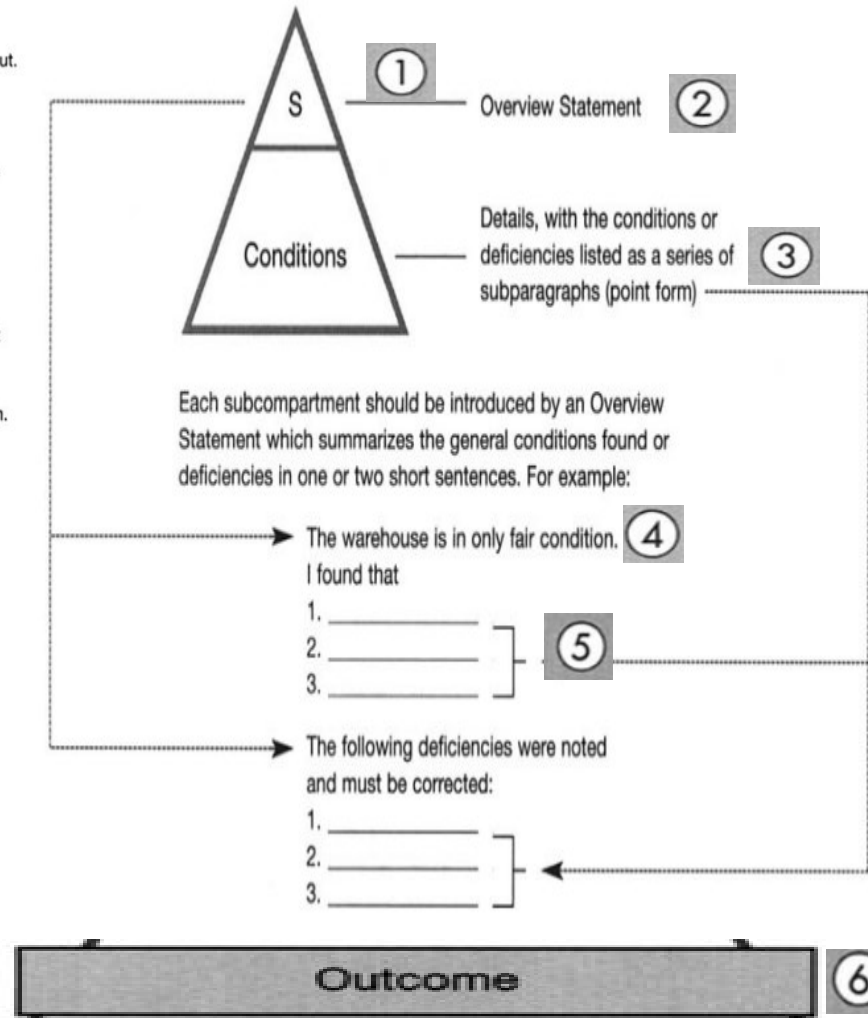
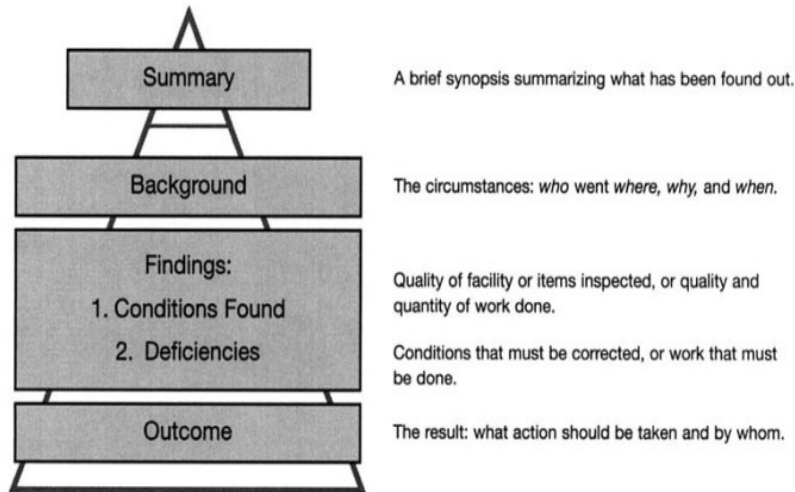
⑧ Field Services will have to arrange for a technician to return to Westland between January 20 and 24, 2003, to disconnect and remove the modification kit.

Frank

c: Gerry Morganski, Field Service Manager

BUSINESS REPORT WRITING TECHNIQUE -STRUCTURE

INFORMAL REPORTS – Inspection report



Use Case III – Inspection

Paul is writing an inspection report on the work done after the alteration to redecorate the new technical publication departments office

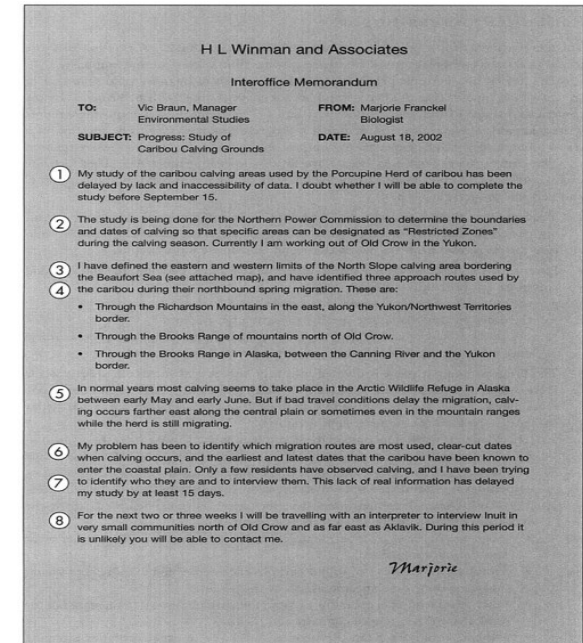
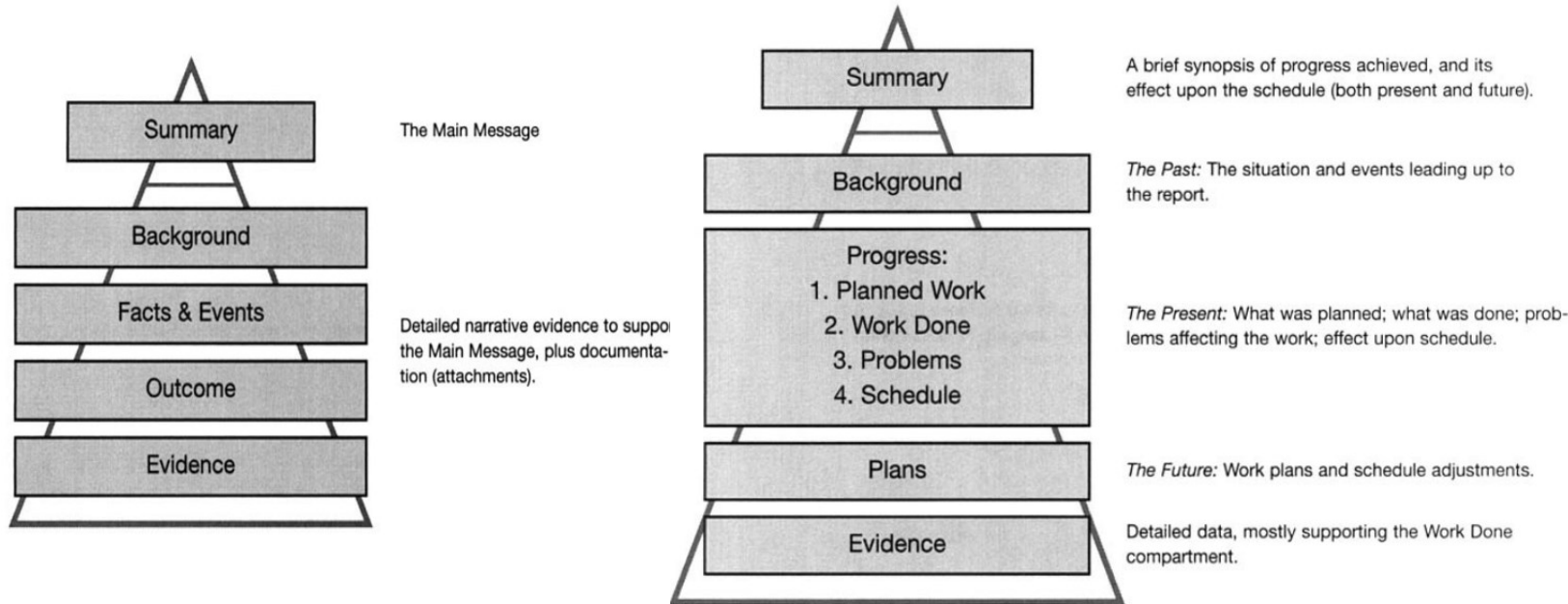
INSPECTION REPORT
Alterations to and Redecoration of New Offices
for the Technical Publications Department

- (1)
- (2) Except for some minor deficiencies, the repair and renovation work is complete. The offices can be occupied on November 1, as scheduled.
- (3) These offices were previously occupied by Nor-West Distributors, who vacated them on September 30, 2001. A contract for renovating and redecorating the premises was let to Craven Builders Inc on October 2; it specified the work to be done and a completion date of October 30, 2001. The contractor notified us on October 26 that the work was complete and I inspected the premises on October 27.
- (4) The contractor has done a generally good job. There are no signs that the previous temporary walls existed or have been removed, and the new temporary walls look like permanent structures. Decorating quality is good.
- (5) I noticed the following deficiencies, which the contractor must correct.
 1. The rubber underlay needs to be relaid under parts of the fitted carpet in the northeast corner of the main office. Currently it is bunched in seven or eight places.
 2. The pelmets over all four windows need to be extended to the specified 78-inch width. Currently they are only 64 inches wide.
 3. The door to the manager's office needs to be rehung so that it closes fully and the lock engages.
 4. Four of the lighting fixtures need to be realigned so that all are at the same level.
 5. The cove needs to be installed at the foot of all walls.
- (6) These deficiencies will not prevent the Technical Publications Department from occupying the offices on November 1, although I suggest that furniture should not be placed in the northeast section of the main office until the carpet underlay has been relaid. All other deficiencies can be corrected without interfering with the department's operations.
I suggest that a second inspection be scheduled before contractor payment is approved.

Paul Thorvaldson
Paul Thorvaldson, PE
October 27, 2001

BUSINESS REPORT WRITING TECHNIQUE -STRUCTURE

INFORMAL REPORTS – PROGRESS REPORT



There are two types of progress reports:

1. Occasional progress reports are written at random intervals and usually concern shorter-length projects.
2. Periodic progress reports are written at regular intervals (usually weekly, biweekly, or monthly) and concern projects spanning several months or years.

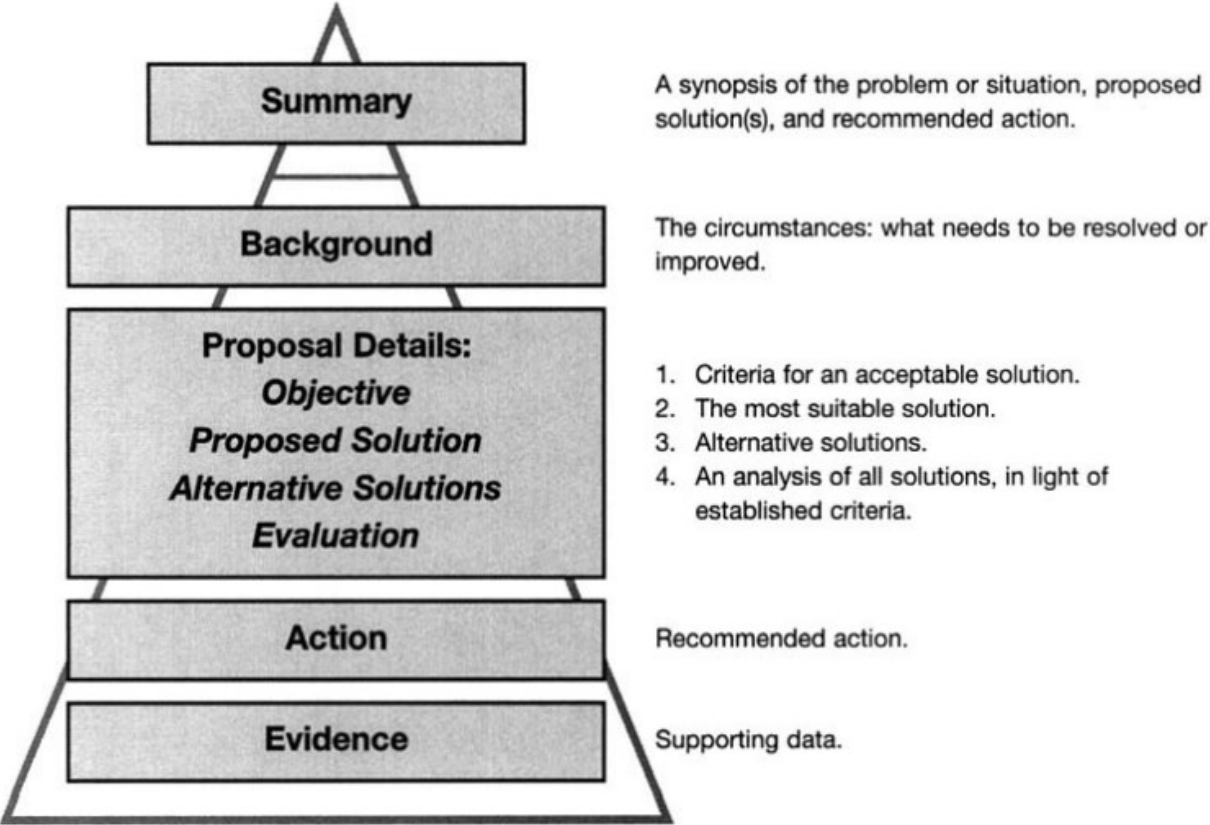
Progress replaces the basic **Facts & Events** compartment and is subdivided into four smaller compartments, which describe planned work, work done, problems encountered, adherence to schedule.

Plans replaces the original **Outcome** compartment. There is also an optional Evidence compartment, for assembling forms and statistical data pertinent to the project.

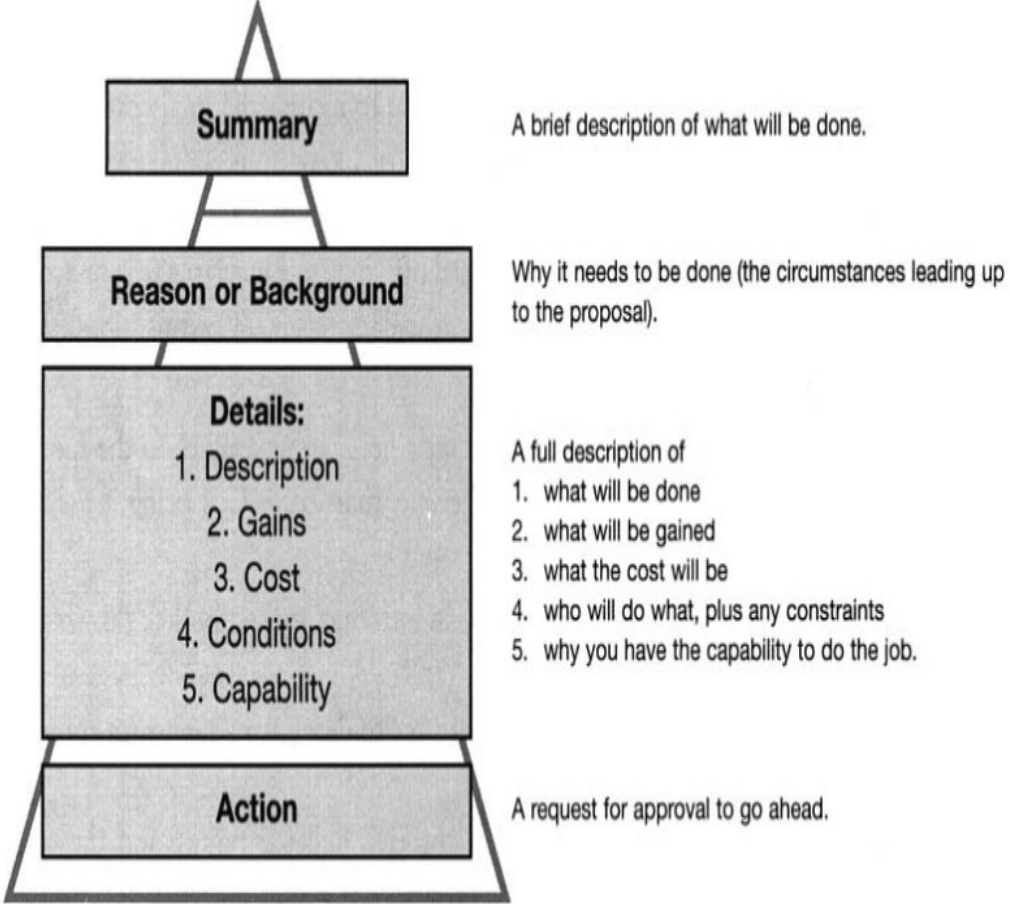
BUSINESS REPORT WRITING TECHINQUE -STRUCTURE

SEMIFORMAL REPORTS – PROPOSALS

Writing plan for a semiformal proposal that presents an idea



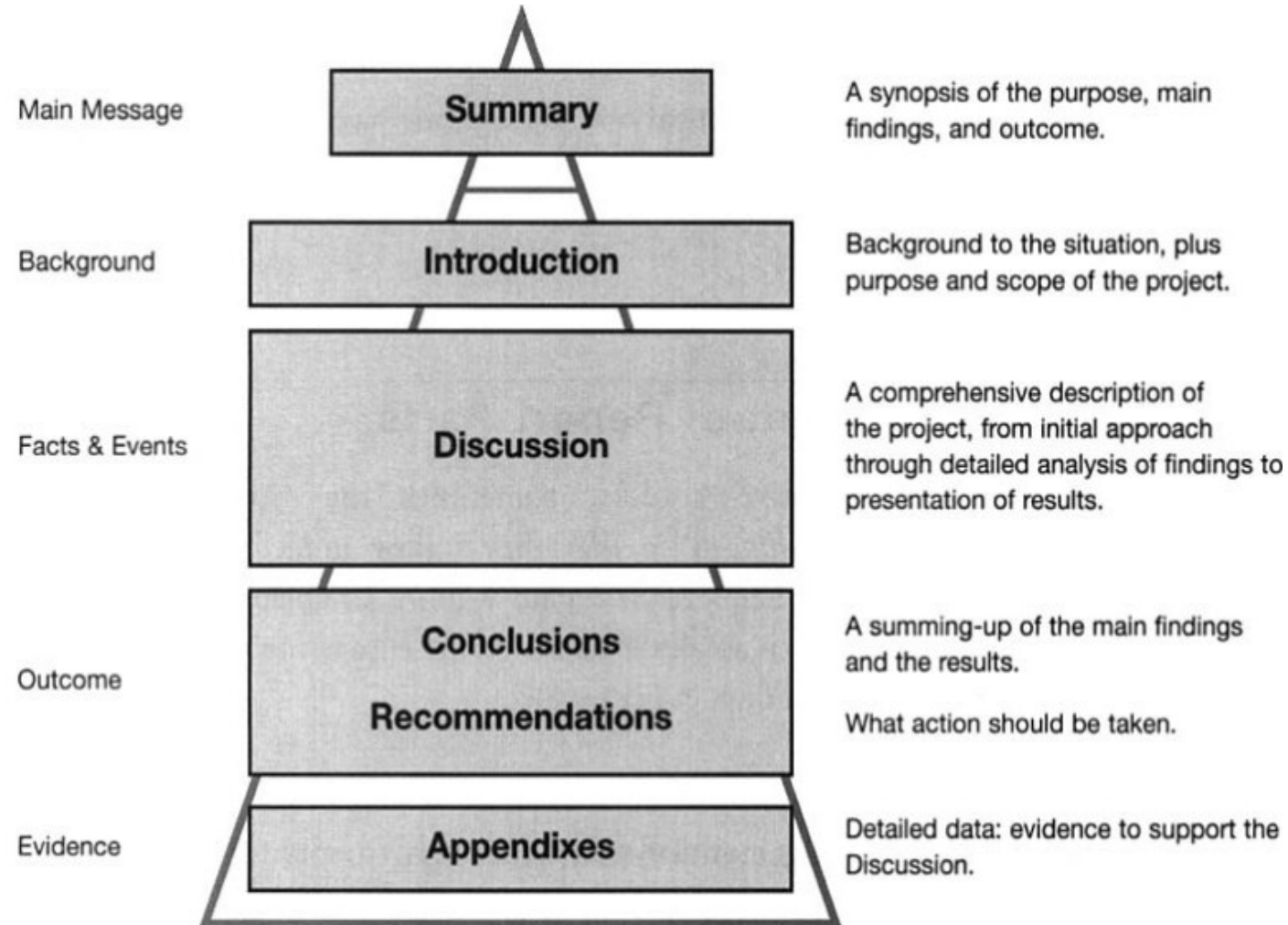
Writing plan for a semiformal proposal that offers a service



BUSINESS REPORT WRITING TECHNIQUE -STRUCTURE

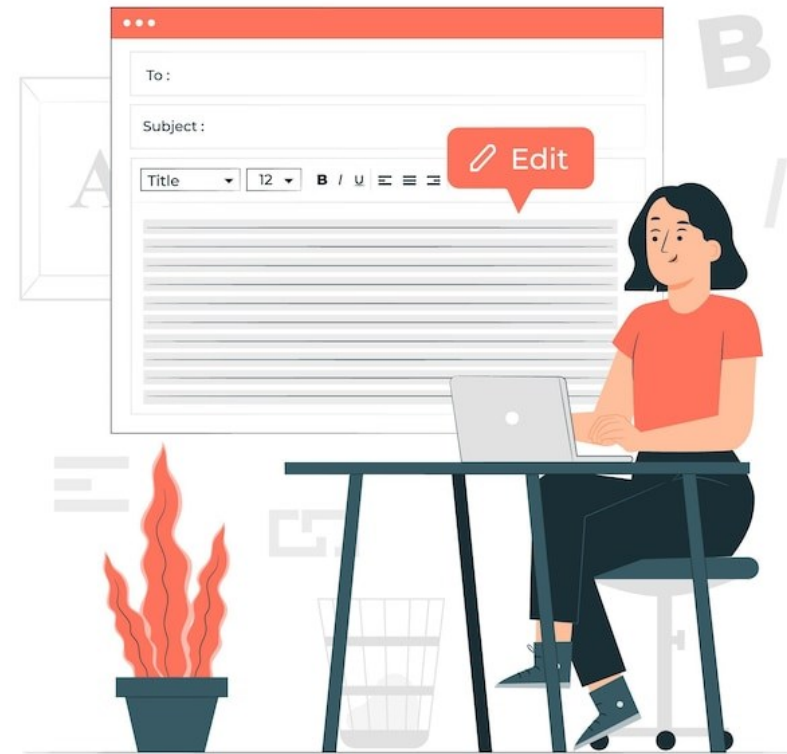
FORMAL REPORTS

Writing plan for a traditional formal report.



BUSINESS REPORT
WRITING STAGES

STEP 4:
WRITING THE
FIRST DRAFT



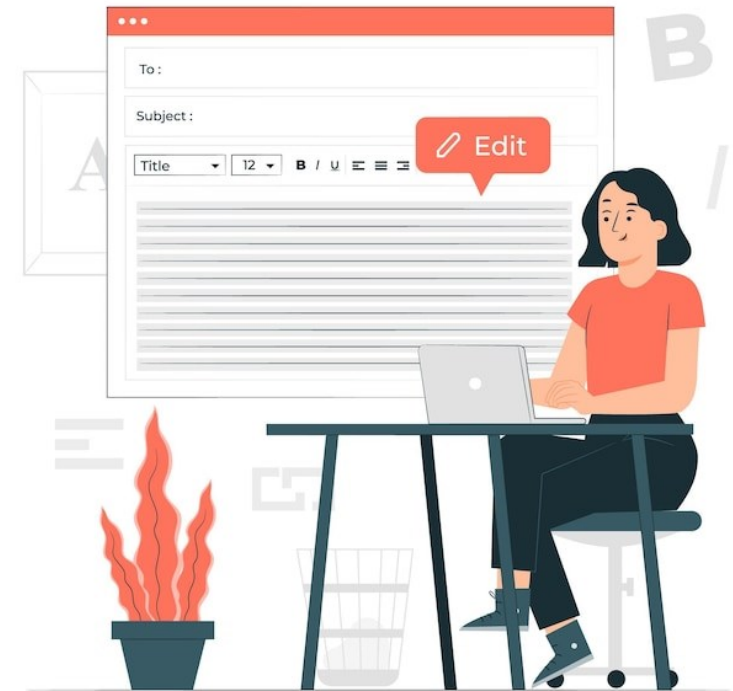
BUSINESS REPORT WRITING TONE

TONE IS REGARDED AS THE WRITER'S **ATTITUDE** – DIRECTED AT **READER AND SUBJECT MATTER**

- TONE SHOULD BE:
 - ✓ **RESPECTFUL** (NOT PATRONIZING)
 - ✓ **PROFESSIONAL**
 - ✓ **ASSERTIVE** (NOT PASSIVE OR AGGRESSIVE)

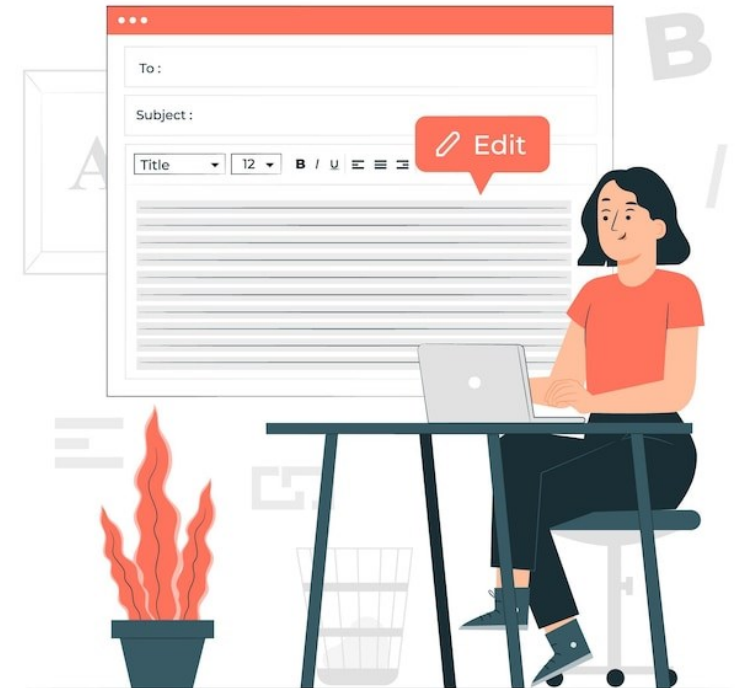
DO NOT:

- Use slangs and casual languages
- clutter
- Give your own opinion



BUSINESS REPORT WRITING STYLE

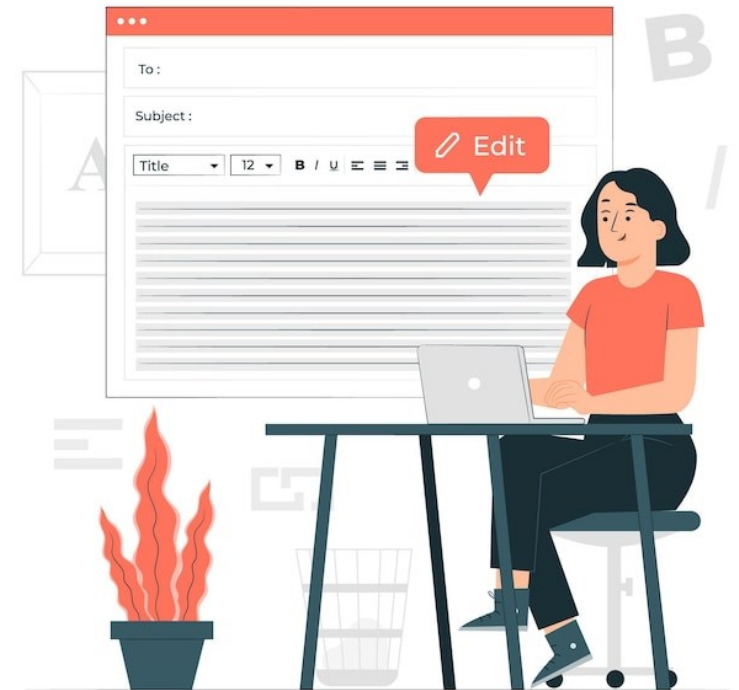
- STYLE IS REGARDED AS THE **DEGREE OF FORMALITY**
- THE APPROPRIATE STYLE IS:
 - ✓ **FORMAL** (NOT INFORMAL)
 - ✓ **FACTUAL** (NOT OPINION-BASED)
 - ✓ **RATIONAL** (NOT EMOTIONAL) – “Connect intellectually with your reader, disconnect your emotions and personal feelings.”
 - ✓ **OBJECTIVE** (NOT SUBJECTIVE)



MECHANICS OF WRITING A REPORT

Size And Physical Design:

- Unruled paper of standard size
- If it is in handwritten then use black or blue ink.
- Margin:
 - Right side: half inches.
 - Left side: One or One and half inches.
- Header and Footer:
 - One inches from the sides spaced should be left.



VISUAL ELEMENTS

- **Headings and subheadings:** You can use headings and subheadings throughout your report to identify the various topics and break the text into manageable chunks.
- Choosing a Font
 - Generally, a serif font is preferred for long documents, whereas a sans-serif font is suitable for short documents and notices. Many people prefer the sans-serif font because it is clean and uncluttered, yet tests have shown that a serif font is easier on the eye
 - No more than two font size or 2 font color.
- To show emphasis, use bold, italic, or larger characters (this is particularly useful for showing the different levels of headings).
- Avoid All Caps
- **Lists:** Use lists whenever possible to break information into easy-to-understand points. Lists can either be numbered or bulleted.
- Very little use of symbols such as *,!!!@,### as they lack seriousness or professionalism
- Using Tables to Display Information

Air Travel	<ul style="list-style-type: none"> • Book with Haynes Travel Services • Charge to Account A78641 	<ul style="list-style-type: none"> • Haynes's invoice • Ticket stub
Accommodation	<ul style="list-style-type: none"> • Request corporate rate (quote file 2120) • Pay with company Visa card 	<ul style="list-style-type: none"> • Hotel/motel receipt
Meals	<ul style="list-style-type: none"> • Per diem rate is \$30 	<ul style="list-style-type: none"> • Receipt not required unless meal cost is over \$25 (excluding tip)

GRAMMER – AVOID:

GENDER SPECIFIC LANGUAGES

Our society has reached a point where more opportunities and career paths are open to all individuals regardless of their gender. Unfortunately, our language has not kept pace. Because we can unknowingly offend our readers, we need to alter our thinking and our writing style to avoid these misunderstandings

if you are tempted to write:

- actor; actress → actor (for both sexes)
- chairman → chairperson or chair
- cowboy → cattle rancher
- Fireman → Firefighter
- Foreman → Supervisor
- policeman; policewoman → police officer
- postman letter (or mail) → Carrier
- Repairman → service technician
- salesman → sales representative
- spokesman → spokesperson
- Workman → worker or employee
- waiter; waitress → server (or waiter for both sexes)

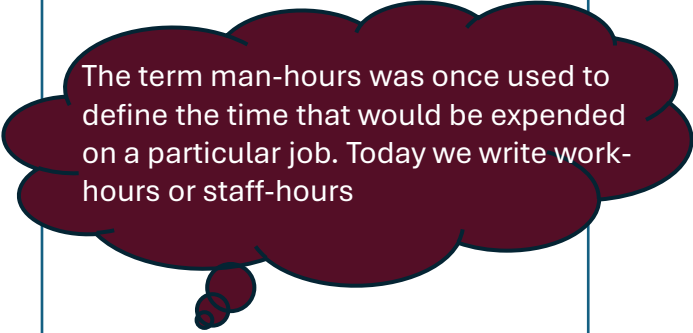
Consider using:

ABBREVIATIONS

- bk., book
- art., article
- ch., chapter
- ed., editor
- ex., example
- ill., illustration
- MS., Manuscripts
- pp page

CONTRACTIONS

- DON'T → DO NOT
- CAN'T → CANNOT
- SHOULDN'T → SHOULD NOT
- COULDN'T → COULD NOT
- WOULDN'T → WOULD NOT
- ISN'T → IS NOT
- HAVEN'T → HAVE NOT



The term man-hours was once used to define the time that would be expended on a particular job. Today we write work-hours or staff-hours

GRAMMER – AVOID:

WORD OF LOW INFORMATION CONTENT (LIC)

actually (X)	bring to a conclusion (conclude)	for the reason that, for this reason (because)
in number, in size (X)	in all probability (probably)	due to the fact that (because)
in fact, in point of fact (X)	in an area where (where)	during the course of (during)
as a means of (for, to)	a majority of (most)	during the time that (while)
as necessary (X)	a number of (many, several)	end result (result)
at present (X)	in an effort to (to)	exhibit a tendency to (tend to)
at this time (X)	in close proximity to (close to, near)	for a period of (for)
in the light of (X)	in color, in length, in connection with (about)	for the purpose of (for, to)
at the rate of (at)	in such a manner as to (to)	it can be seen that (thus, so)
at the same time	in the neighborhood of, in the vicinity of	it is considered desirable (I or we want to)
as a result (so)	(about, approximately, near)	it will be necessary to (I, you, or we must)
as (while)	involves the use of (employs, uses)	of considerable magnitude (large)
in terms of (in, for)	involve the necessity of (demand, require)	on account of (because)
in the course of (during)	is designed to be (is)	on the part of (X)
in the direction of (toward)	communicate with (talk to, email, telephone, write to)	previous to, prior to (before)
in the event that (if)	connected together (connected)	subsequent to (after)
in the form of (as)	contact (talk to, email, telephone, write to)	with the aid of (with)
by means of (by)		with the result that (so, therefore)
by the use of (by)		
in order to (to)		

GRAMMER – AVOID:

OVER WORKED EXPRESSIONS

Overworked expressions can create an even more noticeable negative effect than LIC words because they make the writing seem wordy or insincere and sometimes pompous or evasive.

- a matter of concern
- in the long run
- and/or
- all things being equal
- as a last resort
- last but not least
- as a matter of fact
- many and diverse
- as per
- needless to say
- on the right track
- at this point in time
- conspicuous by its absence
- pursuant to your request
- easier said than done
- regarding the matter of
- enclosed herewith
- slowly but surely
- for your information (as an introductory this will acknowledge phrase)
- we are pleased to advise
- if and when
- we wish to state
- in reference to
- with reference to
- in short supply
- you are hereby advised
- please feel free to
- by no means
- in the matter of

GRAMMER - TO USE

USE ACTIVE VOICE INSTEAD OF PASSIVE VOICE

Active = Carl Dunstan investigated the problem. (*in which the person or object performing the action is stated first*)

Passive = The problem was investigated by Carl Dunstan. (*in which the person or object performing the action is stated after the verb*)

Active = The French won the war

Passive = The war was won by the French

WRITE IN THE FIRST PERSON

I recommend that

We recommend that.....

Not....It is recommended that....

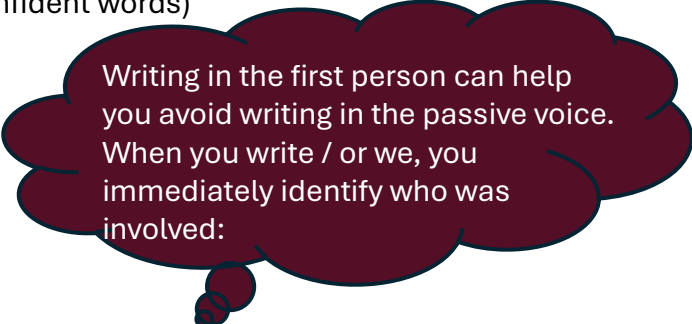
Write in the first person (i.e. to use I, we, me, and my) When you write a report to your manager, to someone in another department, or to someone outside your own organization, you should try to write from person to person. Insert **I** if you are writing for yourself, and **we** if you are reporting for a group of people, your department, or your company.

Primarily Passive Voice:

A study of electricity costs was conducted in three stages over a twelve-month period. First, a survey was taken and a list made of all apartment dwellers in the area. Then a table was constructed in which family size was compared against apartment size. Finally, an analysis was made of apartment dwellers' lifestyles and their major appliance ownership (it was assumed that a stove, refrigerator, and air conditioner were installed as standard equipment in each apartment). (77 unassertive words)

Primarily Active Voice:

We studied electricity costs in three stages over a twelve-month period. First, we surveyed and listed all apartment dwellers in the area, and then constructed a chart comparing family size against apartment size. Finally, we analysed apartment dwellers' lifestyles and their major appliance ownership (we assumed that each apartment was equipped with a stove, refrigerator, and air conditioner as standard equipment). (62 confident words)



Writing in the first person can help you avoid writing in the passive voice. When you write **I** or **we**, you immediately identify who was involved:

GRAMMER & PUNCTIONS TO USE

USE STRONG VERBS AND NOT WEAK VERBS

1) WEAK VERB: He gave assistance to my friend.

STRONG VERB: He assisted my friend.

2) WEAK VERB: She conducted an investigation.

STRONG VERB: She investigated.

USE SIMPLE WORDS

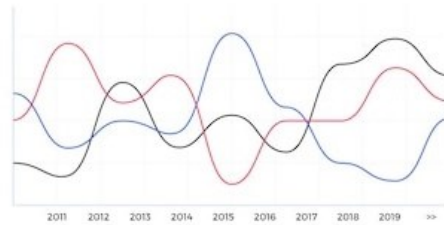
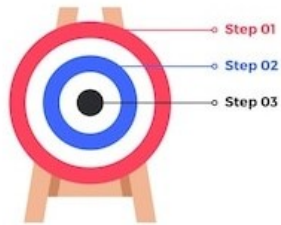
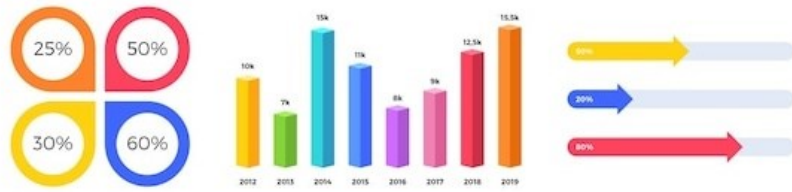
Compare the following two sentences:

A. An aberration of considerable magnitude significantly influenced the character readout.

B. A large deviation seriously affected the character readout

GENERAL GUIDELINES ON ADDING ILLUSTRATING YOUR REPORT

Table, Graph, Bar chart, Flow diagram,
Photograph



Illustrations appear mostly in longer, more formal reports, such as analyses, feasibility studies, proposals, and investigation or evaluation report.

1. Which kind of illustration (e.g. table, graph, bar chart, flow diagram, photograph, etc) will best illustrate the particular feature or characteristic I want my readers to comprehend?
2. Will readers be using the illustration simply to gain a visual impression of an aspect being discussed, or will they be expected to extract information from it?
3. Will the illustration be referred to only once, to amplify or explain a point, or will it be referred to several times in the report narrative? (If it will be referred to frequently, its position needs to be carefully considered.)

ADDING ILLUSTRATIONS TO YOUR REPORT

Tables

Tables document information in tabular form, such as results of tests, quantities of items manufactured, daily receipts, etc.

Guidelines for preparing tables are:

1. Keep the table simple, using as few columns as possible.
2. Limit the amount of data by omitting any details readers will not need.
3. Insert a clear, simple, but fully understandable title at the head of each column.
4. Insert a unit of measurement at the head of a column rather than repeat the unit after each entry within the column. (See how this has been done for % in the table.)
5. Insert the table number and an informative title, and center them immediately above the table.
6. Decide whether the table is to be open or closed (without ruled lines separating the columns or with)
7. Ensure that the report narrative tells readers what they should learn from the table, so that its relevance is clear.

Quality Control Inspection Report: Warrendale Plant

Production Tests: November 1, 2000 — January 31, 2001

<i>Chip No.</i>	<i>No. Chips Manufactured</i>	<i>No. Chips Tested</i>	<i>% of Production Run</i>	<i>No. Chips Failed Test</i>	<i>Failure Rate (%)</i>
AR-17	13 318	480	3.90	9	1.87
CM-20	11 406	300	2.63	2	0.66
FL-06	23 061	460	1.99	3	0.65
RG-14	19 800	375	1.89	1	0.27
RL-08	13 200	260	1.97	5	1.92
RL-21	118 600	1 820	0.69	7	0.38
VX-07	14 087	260	1.85	2	0.52
WR-01*	5 000	330	6.60	12	3.63

*New Product: Production run started December 15, 2000.

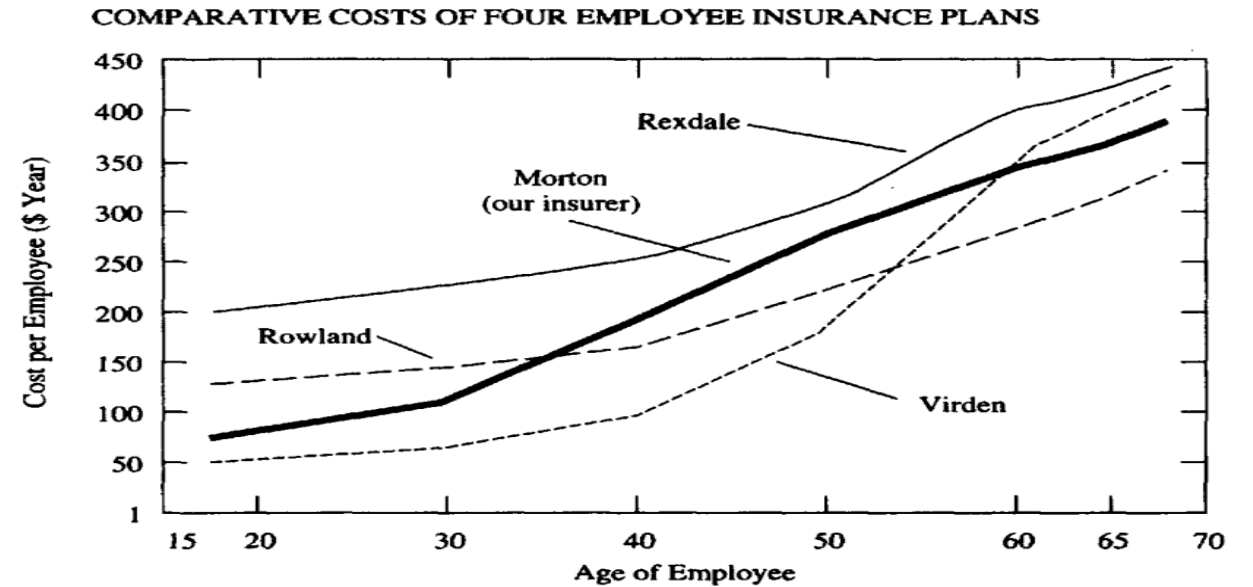
ADDING ILLUSTRATIONS TO YOUR REPORT

Graphs

Graphs offer a simple way to illustrate how one factor affects or is affected by another. They have the advantage that the changes they depict can be readily visualized and understood by most readers

Guidelines for preparing Graphs are:

1. Limit the number of curves on a graph to three if the curves cross one another, or to four if they do not intersect or there is only a simple intersection.
2. Position the curves so they are reasonably centered within the frame provided by the graph's axes. If necessary, adjust the starting point of the scale(s) to move an off-center curve to a more central position.
3. Omit all plot points, to provide a clean, uncluttered illustration.
4. Keep all lettering clear, brief, and horizontal.
5. Omit a grid unless you expect your readers will want to extract their own figures from the graph.



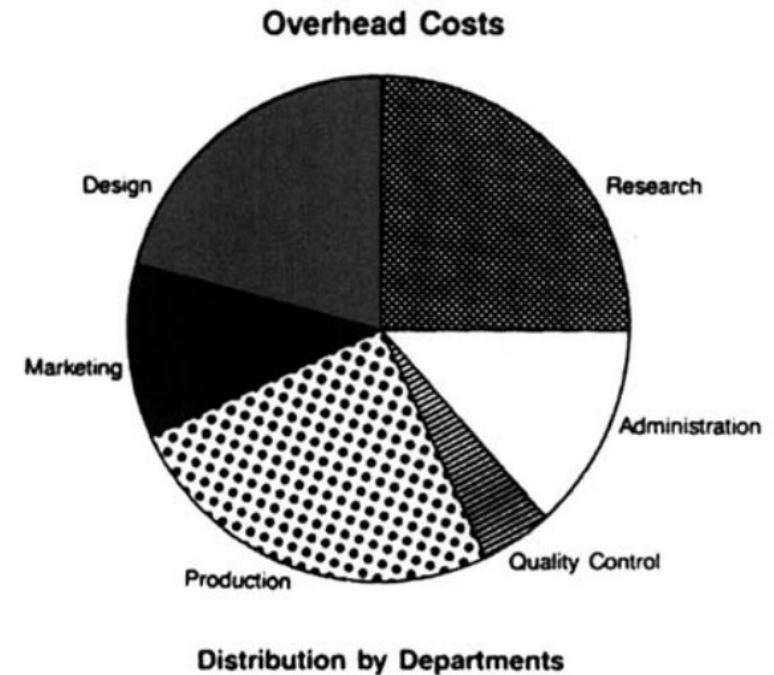
ADDING ILLUSTRATIONS TO YOUR REPORT

Pie Charts

A pie chart is one of the simplest forms of illustration. It is dividing a circle (a "pie") into segments of varying size to illustrate composition

Guidelines for preparing bar/pie charts are:

1. Always make the segments of a pie chart add up to 1, 100%.
2. Check that the segments are visually accurate—i.e. that they are in the correct proportions for the quantities they depict.
3. Ensure that one of the dividing lines between segments is vertical, running from the center of the pie to the top (12 o'clock position).
4. If, in addition to the major segments, there are several very small segments to depict, combine them into one segment and label it "Miscellaneous" (or use a more descriptive term). If it is important for readers to know the composition of this segment, provide a list beside the illustration or in a caption below the chart.



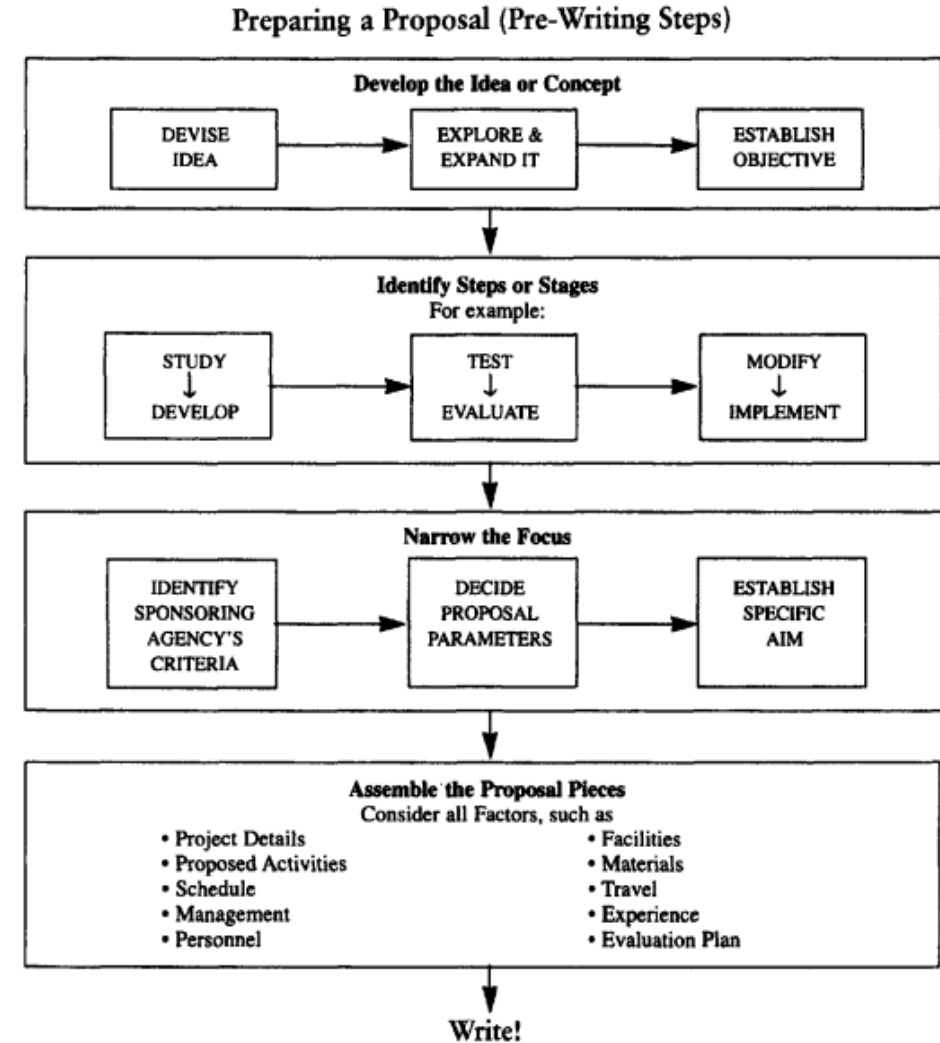
ADDING ILLUSTRATIONS TO YOUR REPORT

Flowcharts, Site Plans, and Line Diagrams

A **flowchart** provides a visual description of a procedure, process, plan, or system. A **site plan** depicts the more significant features of a building site or small area of a town, whereas a **line diagram** can encompass anything that needs to be illustrated (e.g. layout of an office)

Guidelines for preparing flowcharts, site plans and Line Diagrams are:

1. Be as simple as possible
2. Clarify the accompanying written description
3. Contain only the essential elements (which means firmly eliminating unessential elements)
4. Be easy to follow
5. Be readily understood without the written description.
6. Be drawn in clear black ink, and
7. Contain neatly lettered, clear but brief explanatory words



ADDING ILLUSTRATIONS TO YOUR REPORT

Bar Charts

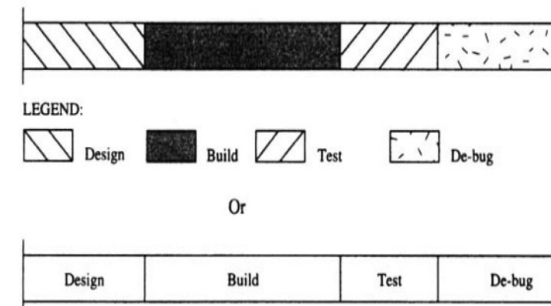
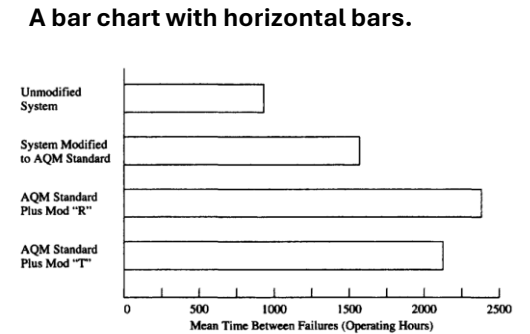
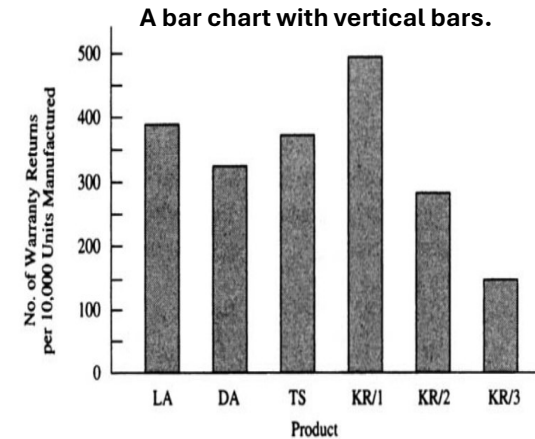
They are simpler to read and understand than graphs and so are particularly useful as illustrations for nonspecialist or lay readers. Normally they provide only a general indication of results, quantity, time, etc.

Guidelines for preparing bar charts are:

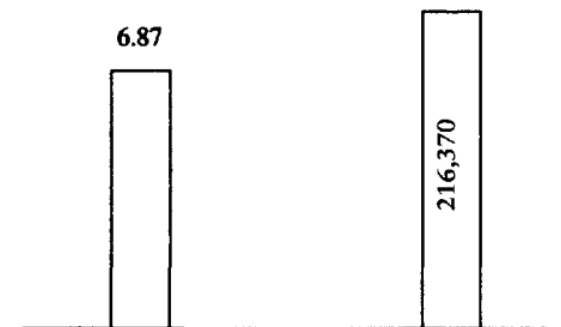
1. Position the bars so they are spaced one-half to one full bar-width apart.
2. Arrange the bars vertically when you are portraying growth factors, such as weight, quantity, cost, or units produced. Insert a clear, simple, but fully understandable title at the head of each column.
3. Arrange the bars horizontally when you are portraying elapsed time or factors in which time is a significant element
4. Shade the bars if you need to make them stand out.
5. If it is important for readers to know the exact total each bar represents, show the totals either immediately above the tops of the bars
6. If the bars are composed of several segments, either identify the segments by various types of shading (and provide a legend beside or below the chart)

Photographs

Photographs are an ideal, accurate way to show readers either close-up details or "the whole picture,"



Bars can be divided into segments either by shading or by lettering



Numbers placed above or within bars show exact figures

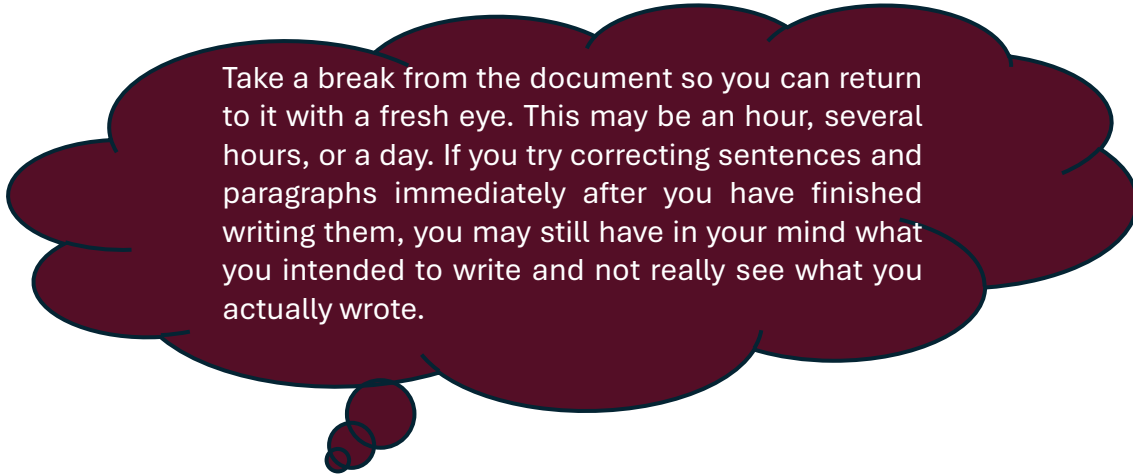
BUSINESS REPORT
WRITING STAGES

STEP 5: QUALITY ASSURANCE



QUALITY ASSURANCE

- **PROOF-READ AND EDIT THE REPORT:**
- PERFORM A **SPELLING AND PUNCTUATION CHECK**
- **CONSULT** WITH LANGUAGE AND SUBJECT MATTER EXPERTS AND RECEIVE FEEDBACK
- MAKE THE NECESSARY **REVISIONS**
- REFER TO THE **EVALUATION CHECKLIST**



Take a break from the document so you can return to it with a fresh eye. This may be an hour, several hours, or a day. If you try correcting sentences and paragraphs immediately after you have finished writing them, you may still have in your mind what you intended to write and not really see what you actually wrote.

FINAL DRAFT

Revising and rewriting the rough draft of the report should be done with great care before writing the final draft. For the purpose, the researcher should put to himself questions like:

- a) **Are the sentences written in the report clear ?**
- b) **Are they grammatically, correct ?**
- c) **Do they say what is meant ?**
- d) **Do the various points incorporated in report fit logically ?**

On these questions we do final drafting

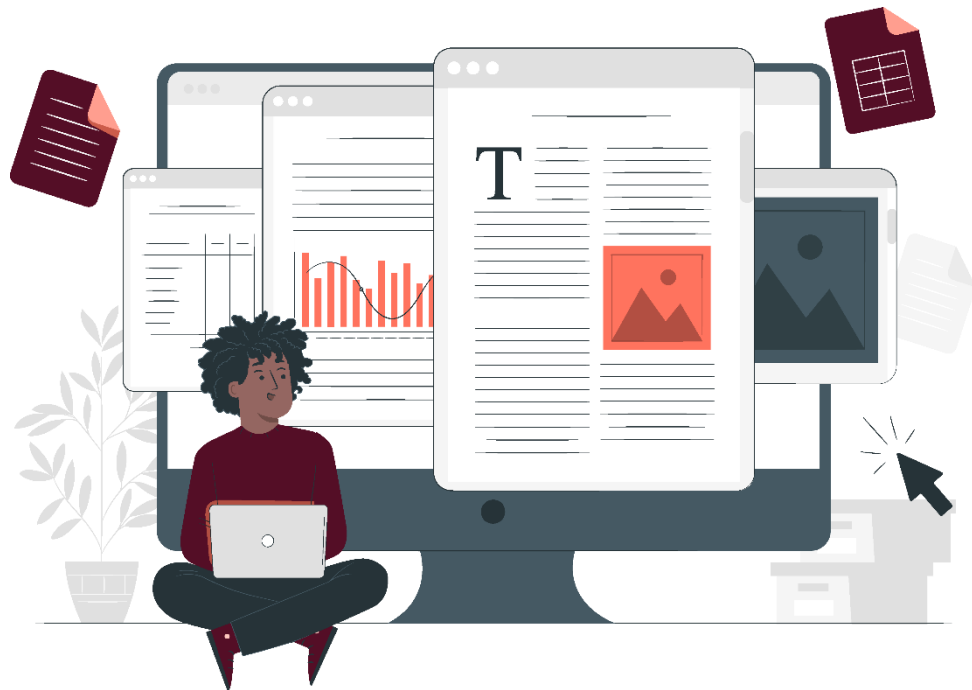


BUSINESS REPORT WRITING STAGES

STEP 6: SUBMISSION AND APPROVAL OF FINAL DRAFT

- **MAKE THE NECESSARY AMENDMENTS AND WRITE THE FINAL DRAFT**
- When asking a reviewer to give you an opinion, explain why the report needs to be reviewed, who the ultimate reader will be, what impact or effect you want the report to have on the reader, what aspects of the report particularly need the reviewer's attention (you don't want the reviewer to think he or she is being asked to proofread the report, when what you really want is an opinion on the report's persuasiveness or tone), and how soon you need the reviewer's comments.
- **SUBMIT TO HIGHER MANAGEMENT TO AUTHORIZE, APPROVE AND ADOPT THE REPORT FINDINGS AND RECOMMENDATIONS**

QUIZ – What are Common Problems with Reports



- Doesn't answer the brief/terms of reference
- Badly (poor or confusing) structured
- Inappropriate writing style
- Poor grammar and punctuation
- Incorrect or inadequate referencing
- Too much/too little/irrelevant material
- Expression not clear
- Doesn't relate results to purpose
- Unnecessary use of jargon

Questions?



Thank you for your attention

