

Chapter 12

Informal Business Reports

**Business
Communication:
Process and Product, 6e**

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Informal Business Reports

Devices for
Analyzing Data

Drawing Report
Conclusions

Report
Recommendation
s

Organization
and Structure

Informational
Reports

Analytical Report

Types of Reports

- Informational
- Analytical

Informational Report Content

Introduction

- Identify the report and its purpose.
- Present a brief overview of the report's organization, especially for longer reports.
- When readers are unfamiliar with the topic, briefly fill in the background details.



Informational Report Content

Body

- Group facts or findings into three to five roughly equal segments that do not overlap.
- Organize by time, component, importance, criteria, convention, or some other method.
- Supply functional or talking heads (at least one per page) to describe each section.

Informational Report Content

Body

- Use an informal, conversational writing style unless a formal tone is expected.
- Use bullets, numbered and lettered lists, headings, underlined items, and white space to enhance readability.

Informational Report Content

Summary/Conclusion

- When necessary, briefly review the main points and discuss what action will follow.
- If relevant, express appreciation or describe your willingness to provide further information.

Typical Informational Reports

Periodic or activity reports

Describe production, sales, shipping, service, and other recurring activities.

Trip, convention, conference reports

Describe an event, summarize three to five main points of interest, itemize expenses, and analyze the event's value.

Typical Informational Reports

Progress and interim reports

Explain continuing projects including work completed, work in progress, future activities, and completion date.

Investigative reports

Examine problems and supply facts; provide little analysis.



Analytical Report Content

Introduction

- Explain why the report is being written. For research studies, include the significance, scope, limitations, and methodology of the investigation.
- Preview the report's organization.
- Summarize the conclusions and recommendations for receptive audiences.



Analytical Report Content

Findings

- Discuss the pros and cons of each alternative. For receptive audiences, consider placing the recommended alternative last.
- Establish criteria to evaluate alternatives. In “yardstick” studies create criteria to use in measuring each alternative consistently.

Analytical Report Content

Findings

- Support the findings with evidence: facts, statistics, expert opinion, survey data, and other proof.
- Use headings, enumerations, lists, tables, and graphics to focus emphasis.

Analytical Report Content

Conclusions/Recommendations

- Develop reasonable conclusions that answer the research question. Justify the conclusions with highlights from the findings.
- Make recommendations, if asked. Use action verbs. Explain needed action.

Typical Short Analytical Reports

Justification/recommendation reports

Make recommendations to management; provide data to solve problems and make decisions.

Feasibility reports

Analyze problems and predict whether alternatives will be practical or advisable.

Yardstick reports

Establish criteria and evaluate alternatives by measuring against the “yardstick” criteria.



Helping the Reader

- Organizing Information
- Using Headings
- Interpreting Data

Organizing Information

Reader comprehension, not writer convenience, should govern report organization. Possible methods:

Time

Arrange data by chronology: e.g., 2006, 2007, 2008.

Component

Arrange data by classifications: location, geography, division, product, or part. A report discussing company profits could be organized by each product.



Organizing Information

Importance

Order data from most important to least important, or vice versa.

Criteria

Arrange data by evaluative categories. In a report comparing fax equipment, organize by such areas as price, warranty, speed, print quality, etc.

Convention

Organize data according to prescribed categories. Proposals, for example, are organized by staff, budget, schedule, and so forth.

Structural Cues for Reports

Introductions

- Discuss purpose and significance of report.
- Preview main points and order of development.

Transitions

however
on the contrary

therefore
moreover

Structural Cues for Reports

Headings

- Write short but clear headings.
- Experiment with wording that tells who, what, when, where, and why.
- Include at least one heading per report page.

Structural Cues for Reports

Headings

Balance headings within levels. All headings at a given level should be grammatically similar. For example:

Creating Team Motivation

Treating Employees Like Customers

(not Employees Should Be Treated Like Customers)

Structural Cues for Reports

Headings

Integrate heading gracefully. Try not to repeat the exact wording from the heading in the following sentence. Also avoid using the heading as an antecedent to a pronoun.

For example, avoid:

CUSTOMER SURVEYS. These are...

REPORT, CHAPTER, AND PART TITLES

The title of a report, chapter heading, or major part should be centered in all caps.

First-Level Subheading

Headings indicating the first level of division are centered and bolded. Whether a report is single-spaced or double-spaced, most writers triple-space (leaving two blank lines) before and double-space (leaving one blank line) after a first-level heading.

Second-Level Subheading

Headings that divide topics introduced by first-level subheadings are bolded and begin at the left margin.

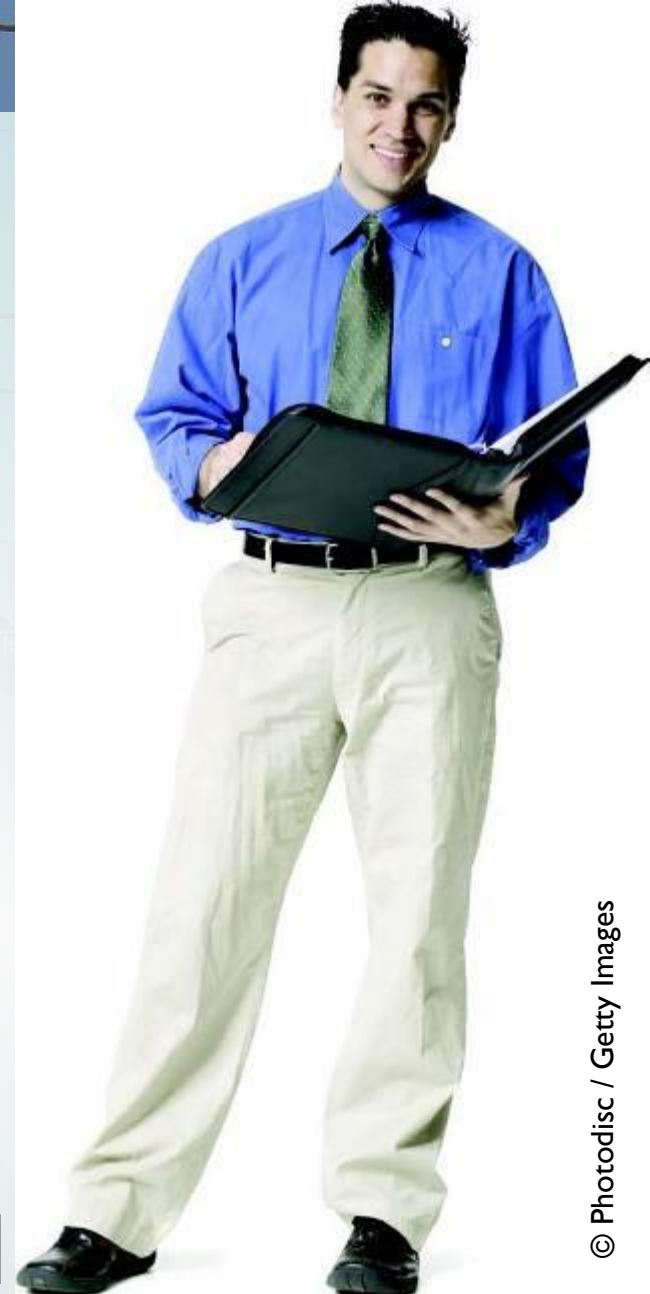
Third-level subheading. Because it is part of the paragraph that follows, a third-level subheading is also called a paragraph subheading. It should appear in boldface print.



Interpreting Data

You are looking for

- ▶ Meanings
- ▶ Relationships
- ▶ Answers!



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Interpreting Data

Devices for tabulating and analyzing data

- **Table** - systematic columns and rows

- **The Three Ms**

Mean - arithmetic average

Median - middle point in a range of values

Mode - most frequent value



Interpreting Data

- **Correlation** - relationships between variables
- **Grid** - boxes of rows and columns to sort data
- **Decision matrix** – grid that allows comparison among weighted criteria



Mean, Median, Mode

Mean: Average value

Median: Middle point in range of values

Mode: Most frequent value



**Shoe
Sizes**

14
12
12
12
12
12
12
11
11
11
11
10
10
9
8
8
7
6
6
6

200

Mean, Median, Mode



The Athletic Department is collecting data on shoe sizes for male and female players. Here are the shoe sizes for 20 people:

What is the mean?

What is the median?

What is the mode?

**How can such statistical values
be important to report writers?**

Shoe Sizes

14
12
12
12
12
12
12
11
11
11
11
10
10
9
8
8
7
6
6
6

200

Mean, Median, Mode



The Athletic Department is collecting data on shoe sizes for male and female players. Here are the shoe sizes for 20 people:

**How can such statistical values
be important to report writers?**

Mean = 10; Median = 11; Mode = 12



Tips for

- Conclusions
- Recommendations

Tips for Drawing Report Conclusions

1

Interpret and summarize the findings.

Tell what your findings (collected data) mean.

2

Relate the conclusions to the report problem.

Focus only on conclusions that help solve the original problem.



Tips for Drawing Report Conclusions

3

Limit the conclusions to the data presented.

Do not introduce new material.

4

Be objective.

Avoid exaggerating or manipulating the data to prove a point.

Tips for Drawing Report Conclusions

5

Use consistent criteria.

In evaluating options, use the same criteria for each alternative.

6

Enumerate each conclusion.

Number and list each item. Present each conclusion in parallel form.



Tips for Making Report Recommendations

1

Suggest actions.

What specific procedures can help solve the report problem?

2

Focus on recommendations that are practical and agreeable.

Suggest feasible actions that would be acceptable to this audience.



Tips for Making Report Recommendations

3

Present recommendations separately.

Enumerate each in a statement beginning with a verb.

Invest two thirds of the income in growth funds.

4

If requested, describe how the recommendations may be implemented.

Some writers present detailed plans for

executing the recommendations.

Conclusions and Recommendations

Conclusion:

Survey results show that the biggest student complaint centered on long registration lines.

Recommendation:

Begin a registration reservation system in which students sign up for specific registration time slots.



DATE: January 2, 2007

TO: Cheryl Bryant, Director
OAS Recycling Program

FROM: Alan Christopher
OAS Business Senator



SUBJECT: Progress of Recycling Study at South Bay College

This report describes the progress of my project with OAS to study the Sun Coast University recycling program and to make recommendations for increasing participation.

Background

Although results from the campus recycling program are satisfactory, OAS feels the participation could be increased. As a result, I was asked by OAS to spearhead a campaign to learn more about campus attitudes toward recycling

Student Progress Report (Continued)

and to suggest ways to improve our program. I agreed to collect secondary data by reading periodicals about recycling efforts in other parts of the country. More importantly, I agreed to collect primary data by conducting a campus survey.

Work Completed

Thus far I have completed the secondary research, which included using the library and databases to find current articles about recycling programs in other areas. Several references had particularly relevant data that will be useful as I write my report. To collect data from the campus population, my business communication class and I worked out a pilot questionnaire. We

tried it out on 28 people and then revised it. Then we administered our revised questionnaire to a convenience sample of 220 individuals.

Work to Be Completed

The questionnaire data must now be tabulated. I plan to work with a committee of three other students in counting questionnaire responses. After making tables and analyzing the data, I will discuss the findings with my class. We will draw conclusions from the findings and discuss ways to improve participation in the recycling program. I think a group discussion is a good way to brainstorm for ideas to improve the program. Because no problems are anticipated, I should be able to integrate the findings, conclusions, and recommendations into a final report to be submitted to you by our January 18 deadline.



End

