

Writing a Formal Report

A formal report provides information and presents recommendations based on that information. Examples include feasibility studies, position papers, research reports and problem solving reports. Each type of report has its own specific requirements for effective preparation, but general guidelines can be applied to all formal reports, and we offer an overview here.

Components of the Formal Report

The following components are found in most formal reports. They can be omitted or included as required:

1. Front Matter:

- Letter to introduce the report to the person who requested it and/or to whom the report is being sent
- Brief summary of the entire report
- Title page
- Table of contents
- List of figures
- List of tables

2. Body:

- Introduction: The purpose, problem statement, background information, research methods, limitations and preview of the report
- Discussion: Data, findings and results
- Conclusion: Summary of purpose, problem statement, relevant background, research methods and findings, recommendations to the reader on the best course of action

3. Back Matter:

- Appendix or appendices
- Bibliography or references
- Glossary

Procedures for Writing a Formal Report

A successful formal report requires task analysis, data collection, organization, structure, drafts and revisions. A suggested procedure includes:

1. Analyze the job: What is the purpose of the report? What are the nature, extent and causes of the problems addressed in the report? What needs to be done to produce it? Who are the readers and what are their needs? What are the best possible solutions?
2. Set a schedule: What tasks will be required to complete the report? How much time will each task take? How much time will the entire report take?
3. Make a basic outline: What are the main points and sub-points in the report? What are the relationships between the points and sub-points?
4. Gather Information: What kinds of information will you need? Where will you get it? Will you use primary or secondary sources or both?
5. Make a detailed outline: How will you organize information to make it easy for the reader to find the answers to the problem(s)? Will the organizational pattern be chronological, reverse chronological, topical,

advantage/disadvantage, problem/solution, cause/effect or something entirely different? Which pattern will work best for your needs?

6. Plan the use of tables and figures: Will you use tables and figures in your report? If so, which would be most useful? Will they be in the body of the text, at the end of the report or both?
7. Write a first draft: What will you write and how will you present it?
8. Revise: What is missing from the report? Are there repetitions or irrelevant data? Is your original problem statement addressed? Is the writing clear, concise and to the point?

Steps to Successful Report Writing

- Choose a title that gains your readers' attention.
- Use headings to divide your report into main blocks of information or sections.
- Make headings brief and understandable without references to the body of the report.
- Use action headings that refer specifically to the information provided below them.
- Format headings in the same way throughout the paper
- Use the correct format for reference citations and bibliography.
- Think of questions the reader wants answered and answer them. Also make recommendations about those answers.
- Organize your data in a logical and accessible manner.
- Double check the needs of your audience and/or instructor and make sure they have been met.
- Use peer editors to help revise and edit your final draft.
- Correct typos, misspellings and grammar and punctuation errors before submitting the report.

References:

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Penrose, John M., Rasberry, Robert W. and Myers, Robert J. (1993) *Advanced Business Communication*. Balmont, California: Wadsworth Publishing Company.