

Business Report Writing for the Workplace



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Overview

- **Different Types of Reports**
- **Purpose of a Business Report**
- **Before writing – how to start**
- **Sections**
- **Writing Style**

What's the Difference?

- **Different types of reports & report writing**
 - academic, critical, analytical, etc
- **Research reports**
 - Aim, method, results, conclusion
- **Technical reports**
- **Creative**
- **Business**

What's the Difference?

- **Key difference?**
 - **Business/workplace reports – cold hard facts.**
 - **No frills**
 - **Clear & Concise**
 - **Systematic attempts to answer questions & solve problems**

What You Should Know

- **Everyone writes reports**
- **Most business reports are informal**
- **The writer is the readers servant**

Purpose of a Business Report

- **Conveys information**
- **Assist in decision-making**
 - **Actual solution**
 - **Past information – future planning**
 - **Business concept**
 - **Management model**
 - **etc**

The 'Art' of Business Report Writing

- **Many report templates**
 - **What's the application?**
 - **What's the best fit?**

From the Start

- **Target audience & readers**
 - **Audience is everything**
 - **Format your write up accordingly**

From the Start

- **Target audience & readers**
- **Scope / purpose of the report**
 - **What exactly does the 'client/reader' want?**
 - **Report/project objective**

From the Start

- **Target audience & readers**
- **Scope / purpose of the report**
- **Gather & organise supporting information**

From the Start

- **Target audience & readers**
- **Scope / purpose of the report**
- **Gather & organise supporting information**
- **Analyse supporting information**

Report Audience

- **Write persuasively**
- **Organise your thoughts**

Report Audience

- **Who are the intended readers?**
 - **Primary:**
 - People making decision the report
 - **Secondary:**
 - People affected by the decisions
 - **Immediate:**
 - People responsible for examining report, viability, distribution of recommendations etc

Report Audience

- **What are the audience expectations?**
- **How much background is needed?**
- **Definition of terms used?**
 - *'Explanation of Terms or Glossary' in appendices*
- **Technical complexity?**
- **Visual presentation of information?**
 - **Graph/Diagram heavy? Word heavy?**

Report Audience

Are your readers

- **Informed?**
- **Supportive?**
- **Eager to have results?**

Or

- **Needing further education on the subject**
- **Need to be persuaded**
- **Disappointed or hostile**

Setting an Objective

- **A few minutes = saving hours of unproductive work.**
- **Clear objective is a single sentence**
 - Expresses what intend to achieve
 - Keep focused and measure your research
- **Intended recipients – Same Question – Different Focus ...**
 - i.e., a report for a Marketing Director very different for the Financial Controller
- **Ask yourself**
 - Why report is required
 - What recipients need to know

Objectives

Example 1:

Help XYZ Organisation evaluate best practice options from other organisations for potential future implementation

Objectives

Need to be

Specific

Measurable

Attainable

Realistic

Time-limited

Objectives

Example 1: Help XYZ Organisation evaluate best practice options from other organisations for potential future implementation

Example 2:

Evaluate best practice examples of engagement initiatives with local community agencies and present XYZ Organisation with recommendations for possible 12month implementation plan during 2012. For Group evaluation by end November 2011.

The Report!

Sections

- **Title Page**
- **Contents**
- **Executive Summary**
- **Introduction**
- **Main Body/Findings/Discussions**
- **Conclusions**
- **Recommendations**
- **References/Sources**
- **Appendices**

Table of Contents

- **Consistently laid out**
- **Include Titles & sub titles & page numbers**

Table of Contents

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Executive Summary

- **Summary of all of the key points**
 - **Purpose**
 - **Scope**
 - **Main points**
 - **Conclusions**
 - **Recommendations**

Executive Summary

- **Summary of all of the key points**
- **Can be read on its own**
 - **if appears logical & inline with expectations, recommendations can be followed without need to read further**
- **Should include summary of all parts *including* recommendations**
- **Most important part of the report & written last**

Introduction

- **States**
 - Purpose & scope
 - Main points
 - Structure of the Report
- **Why the report is being written (objective).**
 - Solve a business problem
 - Recommend alternative approach
 - Increase profits

Main Body of Report

- **State how it is organised up front**
- **Headings clearly identify content**
- **Presented in an order that leads logically towards conclusion/recommendations**

Main Body of Report

For example:

- Research
- Analysis
- Assumptions
- Evaluation
- Findings
- Graphs
- Diagrams

Conclusion

- **Summarise the main body**
 - **do not include diagrams or graphs**
- **Should be short**
- **Clearly follow order of findings**
 - **lead naturally into recommendations.**

Recommendations

- **ALL include recommendations (or at least suggestions).**
- **At least an indicator of what benefits/results of implementation**
 - **Return on Investment etc.**

Recommendations

Couple of approaches:

- ***Decision:***
 - **Decision has positive & negative**
 - Show likely benefits, costs, risks etc
 - Present your suggested 'best' option first
- ***Suggestion:***
 - **Suggest ideas that should be considered**
- ***Benefit:***
 - **Strongly advocate idea to be implemented**

Final Components

References/Sources

Appendices

- Survey examples
- Transcripts
- Detailed documentation
- Other reports of relevance/related

The KEY Components

- **Executive Summary**
- **Recommendations**

Order to Write the Report

Section	Order Written	Order Read
Executive Summary	6	Always
Contents	7	n/a
Introduction	1	Sometimes
Main Body/Findings	3	If interested
Conclusions	4	If surprised
Recommendations	5	Nearly always
References/Sources	2 (write as you go)	If report shows areas for extra investigation
Appendices	Anytime you find extra information/information to included/refer to	Rarely

Writing Style

- **Never use a long word where a short one will do**
- **If it is possible to cut a word out, always cut it out**
- **Never use the passive where you can use the active**
- **Never use a foreign phrase, a scientific word or a jargon word if you can think of an everyday English equivalent.**

Writing Style

- **Make the writing visually easy to read**
- **Place information where it will be seen:**
 - **First & last paragraphs**
 - **Start of the paragraph**
- **Keep paragraphs simple:**
 - **Short paragraphs**
 - **Each paragraph contains one main point**

Writing Style

Paragraphs:

- Important way to organise information
- Enables people to skim through & quickly find information

Writing Style

Visual ease:

- Full paragraph,
- Dot point summary, or
- Visual representation

Writing Style

Be clear & efficient

Writing Style

Example

This is Council's first attempt to promote Indian woolen products in the Chinese market. Though difficult to compete with China in mass production, some products of high quality (shawls, scarves, mufflers) have good potential. These products should be explored in a bid to make their presence in this market.

Writing Style

Example

The underlying structure of the Program is based on all components of the Flinders Graduate Qualities. The Program has also incorporated evaluations sort from Graduate employers as well as the broader categories of career development learning which are: being aware of ones self, being aware of opportunity, being able to make decisions and understanding the nature and what is involved in transition.

Writing Style

OR

The underlying structure of the Program includes:

- the Flinders Graduate Qualities
- Graduate employer evaluations
- the broader categories of career development learning
 - self awareness, opportunity awareness, decision making and transition.

Visual / Graphics

When to use:

- Clarify data
- Create visual interest
- Condense & simplify data
- Make numerical data meaningful

Visual / Graphics

What to use when:

- **Table**
 - To show exact figures & values
- **Bar chart**
 - To compare one item with others
- **Line chart**
 - To demonstrate changes in data over time
- **Pie chart**
 - Visualise a whole unit & proportion of its components

Visual / Graphics

What to use when:

- **Flow chart**
 - Display a process or procedure
- **Organisation chart**
 - Define a hierarch of elements
- **Photos, maps, illustrations**
 - Create authenticity
 - spotlight a location
 - show an item in use

In Summary

- **Think about who you report ‘audience’**
- **Be clear on what is to be addressed**
- **Be concise**
- **Executive summary key to report**
- **What is the best way to present the information**
- **Proof read!**



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