

## Part 1

At some point during your academic or professional career, you may be required to write a report. Reports serve several functions. They may be used to communicate information within an organization upwards to senior management, downwards to staff, or externally to government regulators. They can also serve a persuasive role to get management motivated to take a desired action, support a project, or approve an investment decision. This handout will provide you with an outlined structure for writing reports. After reading this handout you should be able to

- Identify the purpose of a report and the needs of your audience
- Distinguish between informational and analytical reports
- Develop an effective report structure
- Decide on what language and level of detail is appropriate for your target audience
- Apply an appropriate degree of formality to your report
- Determine if the direct or indirect method is appropriate for your target audience
- Create headings, transitions, and graphics to enhance your report's readability

## Preparing and Planning: the Audience and the Purpose

The first thing you must do when writing a report is determine why and for whom you are writing. You may be trying to relay requested information to your boss, or you may make an unsolicited proposal to a financial officer for an investment that will reduce cost. You may be asked to investigate an on-the-job accident, or you may have to explain why a project has fallen behind schedule. The purpose and audience of your report will determine the use of language, the degree of formality, the method of delivery, the structure, and the type of report.

For now, let's focus on the different types of reports. The most common types include

**Periodic reports** – communicate the activities of an ongoing operation at equal and regular intervals. For example, someone might write a quarterly sales report at a retail store.

**Trip and conference reports** – communicate experiences, details, and knowledge gained from attending activities outside of an organization. For example, an employee that spends a weekend attending a training seminar may be asked to communicate the experience to peers in an effort to share knowledge.

**Progress reports** - update management or a supervisor on the progress of a project or a process. Examples include reports that communicate the development of a building site or steps that are being taken to adhere to regulation.

**Investigative reports** – seek to find answers to predetermined questions. A sample report found in a separate handout, for example, answers the question “what is the relationship between the TSX Composite Index and the energy sector?”