

Learning Objectives

After studying this chapter, you will know how to

- LO 15-1** Identify varieties of reports.
- LO 15-2** Define report problems.
- LO 15-3** Employ various research strategies.
- LO 15-4** Choose information for reports.
- LO 15-5** Organize reports.
- LO 15-6** Present information effectively in reports.
- LO 15-7** Document sources correctly.
- LO 15-8** Write progress reports.
- LO 15-9** Prepare the different components of formal reports.

Careful analysis, smooth writing, and effective document design work together to make effective reports, whether you're writing a 2½-page memo report or a 250-page formal report complete with all the report components. Reports typically depend on research. The research may be as simple as pulling up data with a computer program or as complicated as calling many different people, conducting focus groups and surveys, or even conducting experiments. Care in planning and researching proposals and reports is needed to produce effective documents.

In writing reports, there are four basic steps:

1. Define the problem.
2. Research and analyze data and information.
3. Organize the information.
4. Write the report.

Varieties of Reports

LO 15-1

Many kinds of documents are called reports. In some organizations, a report is a long document or one that contains numerical data. In others, one- and two-page memos are called reports. In still others, reports consist of PowerPoint slides delivered orally or printed and bound together. A short report to a client may use letter format or even be delivered via email. **Formal reports** contain elements such as a title page, a transmittal, a table of contents, an executive summary, and a list of illustrations. **Informal reports** may be letters and emails or even computer printouts of production or sales figures. But all reports, whatever their length or degree of formality, provide the information that people in organizations need to make plans and solve problems.

Reports can provide just information, both information and analysis alone, or information and analysis to support a recommendation (see Figure 15.1). Reports can be called **information reports** if they collect data for the reader, **analytical reports** if they interpret data but do not recommend action, and **recommendation reports** if they recommend action or a solution.

Figure 15.1 Variety of Information Reports Can Provide

Information only
Sales reports (sales figures for the week or month).
Quarterly reports (figures showing a plant's productivity and profits for the quarter).
Information plus analysis
Annual reports (financial data and an organization's accomplishments during the past year).
Audit reports (interpretations of the facts revealed during an audit).
Make-good or payback reports (calculations of the point at which a new capital investment will pay for itself).
Information plus analysis plus a recommendation
Recommendation reports evaluate two or more alternatives and recommend which alternative the organization should choose.
Feasibility reports evaluate a proposed action and show whether or not it will work.
Justification reports justify the need for a purchase, an investment, a new personnel line, or a change in procedure.
Problem-solving reports identify the causes of an organizational problem and recommend a solution.

The following reports can be information, analytical, or recommendation reports, depending on what they provide:

- **Accident reports** list the nature and causes of accidents in a factory or office. These reports also can analyze the data and recommend ways to make conditions safer.
- **Credit reports** summarize an applicant's income and other credit obligations. These reports also can evaluate the applicant's collateral and creditworthiness and recommend whether or not to provide credit.
- **Progress and interim reports** record the work done so far and the work remaining on a project. These reports also can analyze the quality of the work and recommend that a project be stopped, continued, or restructured.
- **Trip reports** share what the author learned at a conference or during a visit to a customer or supplier. These reports also can recommend action based on that information.
- **Closure reports** document the causes of a failure or possible products that are not economically or technically feasible under current conditions. They also can recommend action to prevent such failures in the future.
- **White paper reports** explain a problem and then may advocate for a solution to the problem. These reports can be written to inform a general audience. Sometimes companies use white paper reports for marketing purposes.
- **Return on investment (ROI) reports** correlate how money companies spend on advertising relates to sales or increased traffic. Marketing firms routinely compose these reports for clients.

Report Problems

LO 15-2

Good reports grow out of real problems: disjunctions between reality and the ideal, choices that must be made. When you write a report as part of your job, the organization may define the problem. To brainstorm problems for class reports, think about issues that face your college or university; housing units on campus; social, religious, and professional groups on campus and in your city; local businesses; and city, county, state, and federal governments and their agencies.

A good report problem in business meets the following criteria:

1. The problem is
 - Real.
 - Important enough to be worth solving.
 - Narrow but challenging.
2. The audience for the report is
 - Real.
 - Able to implement the recommended action.
3. The data, evidence, and facts are
 - Sufficient to document the severity of the problem.
 - Sufficient to prove that the recommendation will solve the problem.
 - Available to *you*.
 - Comprehensible to *you*.

Often, problems need to be narrowed. For example, “improving the college experiences of international students studying in the United States” is far too broad. First, choose one college or university. Second, identify the specific problem. Do you want to increase the social interaction between U.S. and international students? Help international students find housing? Increase the number of ethnic grocery stores and restaurants? Third, identify the specific audience that would have the power to implement your recommendations. Depending on the specific topic, the audience might be the Office of International Studies, the residence hall counselors, a service organization on campus or in town, a store, or a group of investors.

Some problems are more easily researched than others. If you have easy access to the Chinese Student Association, you can survey its members about their experiences at the local Chinese grocery. However, if you want to recommend ways to keep the Chinese grocery in business, but you do not have access to the store’s financial records, you will have a much more difficult time solving the problem. Even if you have access, if the records are written in Chinese, you will have problems unless you read the language or have a willing translator.

Pick a problem you can solve in the time available. Six months of full-time (and overtime) work and a team of colleagues might allow you to look at all the ways to make a store more profitable. If you’re doing a report in 6 to 12 weeks for a class that is only one of your responsibilities, limit the topic. Depending on your interests and knowledge, you could choose to examine the prices and brands carried, its inventory procedures, its overhead costs, its layout and decor, or its advertising budget.

Look at the following examples of report problems in the category of technology use:

- | | |
|---------------------|--|
| Too broad: | Texting in class and its effects on college students. |
| Too time-consuming: | What are the effects of in-class texting on college students? |
| Better: | What are texting habits of students in XYZ University’s Business School? |
| Better: | How can texting be integrated in XYZ University’s business courses? |

The first problem is too broad because it covers all college students. The second one is too time-consuming. Scholars are only starting to study the effects, and for you to do a report on this topic, you would need to do your own longitudinal project (i.e., a study of

students' in-class texting habits over time). The third and fourth problems both would be possibilities. You would select one over the other depending on whether you wanted to focus on students or courses.

How you define the problem shapes the solutions you find. For example, suppose that a manufacturer of frozen foods isn't making money. If the problem is defined as a marketing problem, the researcher may analyze the product's price, image, advertising, and position in the market. But perhaps the problem is really that overhead costs are too high due to poor inventory management or that an inadequate distribution system doesn't get the product to its target market. Defining the problem accurately is essential to finding an effective solution.

Once you've defined your problem, you're ready to write a purpose statement. A good **purpose statement** makes three things clear:

- The organizational problem or conflict.
- The specific technical questions that must be answered to solve the problem.
- The rhetorical purpose (to explain, to recommend, to request, to propose) the report is designed to achieve.

The following purpose statement for a report to the superintendent of Yellowstone National Park has all three elements:

Current management methods keep the elk population within the carrying capacity of the habitat but require frequent human intervention. Both wildlife conservation specialists and the public would prefer methods that controlled the elk population naturally. This report will compare the current short-term management techniques (hunting, trapping and transporting, and winter feeding) with two long-term management techniques, habitat modification and the reintroduction of predators. The purpose of this report is to recommend which techniques or combination of techniques would best satisfy the needs of conservationists, hunters, and the public.

To write a good purpose statement, you must understand the basic problem and have some idea of the questions that your report will answer. Note, however, that you can (and should) write the purpose statement before researching the specific alternatives the report will discuss.

Research Strategies for Reports

LO 15-3

Research for a report may be as simple as getting a computer printout of sales for the last month; it may involve finding published material or surveying or interviewing people. **Secondary research** retrieves information that someone else gathered. Library research and online searches are the best-known kinds of secondary research. **Primary research** gathers new information. Surveys, interviews, and observations are common methods for gathering new information for business reports.

Finding Information Online and in Print

You can save time and money by checking online and published sources of data before you gather new information. Many college and university libraries provide workshops and handouts on research techniques, as well as access to computer databases and research librarians.