



# The Stages of Report Writing

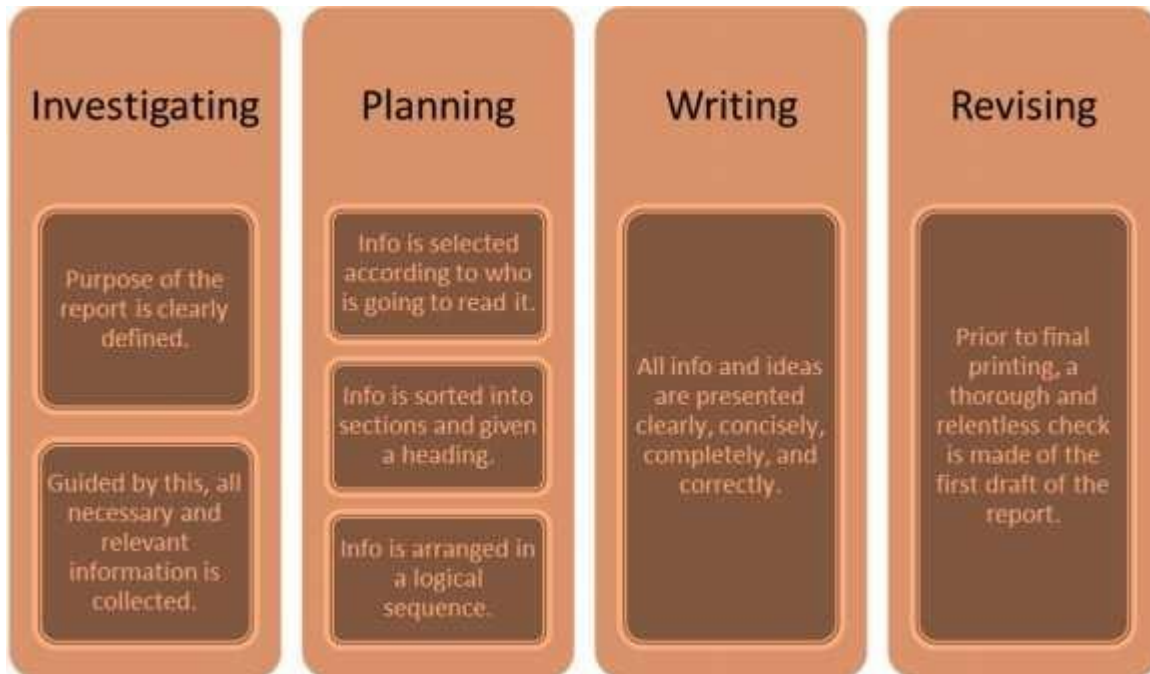
## Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Explore four stages of report writing.

## The Stages of Report Writing

There are four stages involved in the production of a report:



In each of the stages, every effort should be made to ensure that the report follows the rules of good writing and is clear, concise, complete, and correct.

Writing a report will probably remind you a little of work that you did in school. Remember that there is a lot of work to do before you actually start to write. You finish things up by editing, editing, and editing again.

### The First Stage – Investigating

#### Gathering Information

**Your first step is to gather the information for your report.** Following these guidelines will ensure that what you gather is accurate.

- Collect your evidence before you write by observing, interviewing, doing research, and gathering data.
- Organize your evidence.
- Keep your evidence clear of your opinions. Make sure that your own bias isn't skewing the evidence by letting how you feel about it get in the way of what you gather.

In most studies, you will gather masses of information and you must **be selective** about what goes into your report. Your selection should be based on:

- The purpose of your report. What is it meant to achieve?
- The people to whom it is directed (the reader or readers). You have to decide what the readers already know and what they need to know.

Unless you are an unquestioned authority on your subject matter, **your opinions** will only carry as much weight as the evidence that you can gather. The more evidence you can collect before writing, the easier your writing will be.

**Evidence** consists of the facts and information you gather in three ways:

- Careful observation
- Interview
- Research (in your company library or archives, surveys, statistical review, etc.)

In order to make sure that your report is not biased, don't focus only on evidence that will support your argument. You need to objectively present the positive and negative results in order for people to see the integrity in your data and the report.

To give formal reports credibility and authority, researchers generally rely on a certain amount of secondary data, obtained in print or electronically. What suggestions do you have for conducting effective research? Where do you look for information?

## **Test your knowledge**

### **Let's Get Thinking!**

**What sources might you use for each of these report topics?**

**Results of 360 degree performance reviews**

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**How much succession planning New England farmers have done**

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**Efficiency of different types of project management software**

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**Alternative energy sources that your company could use**

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**Safety issues in your workplace**

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## Trends in the shipping industry

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## The Second Stage – Planning

### Choosing a Report Format

It's time now to plan your way through the rest of the report, so try to delay the temptation to start writing for just a little while longer.

First, **review the purpose of the report**. This could be to share an idea, answer a question, solve a problem, or share information. Make sure that you can describe the purpose of the report in straightforward terms. This will help you to keep your information clear when you start to write.

Consider the different **types of formats** available to you and decide which is best for the information that you have and for your audience. The different report types are presented here from least to most formal.

### Memorandum Report

This format looks like a regular memorandum (memo) at the top. It is helpful as a short report about internal matters, and is not sent to anyone outside the company. A memorandum report can be helpful for reporting on internal sales figures, letting a manager know how the team has done during the , or to provide an interim update on an inventory.

Since this is an internal document, it can be objective and impersonal. Simple headings and text that is flush left in bold or italics are often used for quick referencing. The report may be initialed at the beginning, where the sender's name is noted, or signed at the bottom (four lines after the text ends and typed above a signature line), or left unsigned. Your standard company memo format is used on the first page, and subsequent pages are printed on plain paper.

### Letter Report

The letter format is practical for informal reports that run several pages. Since it is in a letter format, it can also be used for people or groups outside of the organization. These reports are typically used by outside consultants to provide updates on project analyses or recommendations. The may also be used by a board

of directors to describe changes and developments to stakeholders. The first page of a letter report is typed on letterhead stationery, with plain paper used for subsequent pages. Opening with a subject line replaces a title, and simple headings (as in the memo report) add emphasis and clarity.

### **Short Report**

Short reports are distinct from memo and letter reports in both scope and format. They may include several of the same elements of a formal report, such as:

- A title page
- Preliminary summary (including conclusions and recommendations)
- Authorization details
- Statement of the problem
- Observations
- Conclusions
- Recommendations

**Tables and graphics** may be added if they are pertinent. **Headings**(as described in the formal report below) may also be used.

### **Formal Report**

Formal reports are a sophisticated presentation. They are more complex and longer than the other formats due to the content. A formal report may include all of the following elements, which are often described in company policy in order to keep reports consistent throughout an organization.

#### **Cover**

Includes the title and author's name, and may be on a label attached to the cover if the cover is not a printable material. (Colored or clear plastic are often used.)

#### **Flyleaf**

A blank page following the cover. There can also be one at the end of the report, where people can write comments if they want.

#### **Title Page**

Title of the report, who the report was prepared for (name and title of recipient), author's name, position, department and/or address, and date.

#### **Letter of Authorization**

If the writer received written authorization to undertake the report, the letter or memo may be inserted here. If authorization was verbal, then a note describing who provided authorization can be part of the letter of transmittal or the introduction (described on the next page).

## **Letter of Transmittal**

Explains how, why, and under what circumstances the report was prepared. This may also be a preface to the report. This document outlines the purpose of the report, its scope, any limitations to the report, and the research methods used. This letter often ends with a thank you for the assignment and openness to answer any questions about the report. This letter is printed on letterhead and signed by the author.

## **Foreword or Preface**

Often completed by someone other than the writer (such as a department head or other stakeholder).

## **Synopsis or Executive Summary**

An informative summary covering the purpose of the report as well as key findings, conclusions, and recommendations.

## **Table of Contents**

Contains main divisions with page numbers.

## **List of Figures or Illustrations**

Needed only if there are many illustrations and graphs.

## **Introduction**

Includes whatever the reader needs in order to understand the report, such as background, scope and limitations; details about your approach or method; and criteria used in making your evaluation.

## **Body**

The meat of the report.

## **Summary**

Tells your reader what you set out to do and what your findings are.

## **Conclusions**

Summarizes the facts in the report and spells out the conclusions.

## **Recommendations**

Offers recommendations based on the conclusions.

## **Appendix**

May include statistics, tables, and other information of interest. This is information that would only be useful to some readers and would therefore not be appropriate in the body of the report.

## **Glossary**

Helpful if your readers are not familiar with vocabulary used in the report.

## **Index**

Not required, but helpful in extensive reports.

## **References**

Very extensive reports may also contain footnotes or endnotes and a bibliography.

## **Notes**

Some of the elements listed above may be left out, depending on the nature of the report and the audience. For example, a letter of transmittal may be waived depending on the information in the foreword.

Reports that are long are normally bound on the left margin, so wide left-hand margins and right flush page numbers are appropriate. The opening pages (excluding the title page) are normally paginated with lowercase Roman numerals (i, ii, iii, iv, etc.), while the rest of the report is paginated with Arabic numerals (1, 2, 3, 4, 5, etc.).

## **Test your knowledge**

### **Individual Activity**

**Review the report that you brought in as your pre-assignment.**

**Can you see how other formats would work for your report?**

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What are appropriate formats for the type of work that you are doing?

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### The Third Stage – Writing

These rules will help to keep your writing clear, concise, complete, and correct:

1. Use familiar words
2. Prefer short, simple words
3. Use concrete words
4. Prefer active to passive verbs
5. Avoid camouflaged verbs
6. Arrange sentences for emphasis and clarity
7. Keep sentences short
8. Ensure modifying words and phrases relate to nouns and pronouns
9. Use words economically

#### Use Familiar Words

**The preponderance of businessmen we consulted envision signs of improvement from the current siege of economic stagnation.**

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**If liquidation becomes mandatory, we shall dispose of these assets first.**

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**Mr. Casey terminated John's employment as a consequence of his ineffectual performance.**

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**Prefer Short, Simple Words**

**The most operative assembly line configuration is a unidirectional flow.**

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**Business has an inordinate influence on governmental operations.**

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**It is imperative that the consumer be unrestrained in determining his preferences.**

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**Our expectations are that there will be increments in commodity value.**

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**Use Concrete Words**

**We have found that young men are best for this work.**

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**He makes good grades.**

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**John lost a fortune in the stock market.**

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**If we don't receive the goods soon, we will cancel.**

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**Profits last year were exorbitant.**

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**Test your knowledge**

**Prefer Active to Passive Verbs**

**Our action is based on the assumption that the competition will be taken by surprise.**

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**It is believed by the typical union member that their welfare is not considered to be important by management.**

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**We are serviced by the Bratton Company.**

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**Our safety is the responsibility of management.**

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**You were directed by your supervisor to complete this assignment by noon.**

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**It is recommended that the machines be purchased by our company.**

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**Because of our policy, the proper thing is being done by us for excellent jobs performed by any and all of our employees.**

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**Issuance of a supplement to the report was undertaken.**

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**The above-mentioned report that we are approving is enclosed.**

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**Your thoughtful suggestions are graciously accepted. Hopefully, forthcoming recommendations are being given the same sort of careful consideration by you.**

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**Test your knowledge  
Avoid Camouflaged Verbs**

**It was my duty to make a determination of the damages.**

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**We will make her give an accounting of her activities.**

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**Ensure Modifying Words and Phrases Relate to Nouns and Pronouns**  
**Miss DuClerq is the only secretary to Mr. Grossmeyer.**

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**Report any other defects or mechanical damage to the supervisor in the finished product.**

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**Loose blouses which some women wear around punch presses are hazardous.**

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**Arriving early for my interview the Personnel Office was not open.**

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**Swearing thunderously the office almost shook with the boss's anger.**

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**Driving cautiously the dangerous intersection was approached.**

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**Jackson has opposed often giving praise to the workers.**

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**Smith stated late in the week the production was behind schedule.**

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**Use Words Economically**

**In view of the fact that we financed the experiment, we were entitled to some profit.**

**We will deliver the goods in the near future.**

**Mr. Watts outlined his development plans on the occasion of his acceptance of the presidency.**

**I will talk to him with regards to the new policy.**

**The candidates which had the most money won.**

**There are many obligations which we must meet.**

**We purchased coats which are lined with wolf fur.**

**Mary is of the conviction that service has improved.**

**Sales can be determined to have improved over last year.**

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**It is essential that we take the actions that are necessary to correct the problem.**

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## The Fourth Stage – Revising

### Checklist for Success

A good report can lose credibility if it is shabbily written or poorly organized. We recommend that you submit to relentless revision in order to polish your report. The best way to start this is to set the report aside for a day so that when you return to it, you do so with fresh eyes and energy. Give yourself a breather.

In the revision stage, your objective is to ensure that your report measures up to the four C's of business writing. This means that your report should be clear, complete, concise, and correct.

Your report is **clear** if it is fully understood at first reading. By **concise**, we mean that all information is down to an intelligent and intelligible minimum. Your report is **complete** when every piece of essential information has been included. Finally, your report is **correct** when all information is both accurate and verifiable.

### Checklist for Revising

Review your first draft with the following points in mind.

#### Check the Facts

It's embarrassing (and possibly fatal to your reputation) to build a whole case on incorrect facts or figures. Be careful not to treat an assumption as a fact, nor to treat assumptions from other people as facts.

#### Check the Length

Should you cut or add? A report is too long if it tells the readers more than they want to know. It is too short if it misses important evidence or fails to draw obvious conclusions. Make sure you've given your readers the details and examples they need to see your point and accept it. Remember that we are inundated with too much to read, so don't make the frequent mistake of assuming that readers are interested in a blow-by-blow account; you can smother the important points in too much detail. Not every bit of information uncovered in your research needs to be included.

## **Check the Organizational Structure**

Your report ought to have a beginning, middle, and an end, and each part should do its job effectively. The beginning should make it clear what the communication is about. The middle should develop and support the main idea with specifics: details, figures, examples, quotations. The ending should summarize, reinforce the point, and perhaps make recommendations.

Check each paragraph for unity and coherence. Unity means that only one idea is developed in each paragraph. Coherence means that each sentence in the paragraph logically hooks onto the preceding sentence and leads into the following one. Look at your paragraphs: can you identify a topic sentence in each (a sentence that states the main idea which the rest of the paragraph develops)? If not, the paragraph may be a candidate for deletion or rewriting.

Your goal is to make clear that each paragraph relates to the main idea (your thesis), that each grows out of the preceding paragraph, and that each leads into the following one. A paragraph should begin with something that links it to the one before it. The linking word may be a key word repeated, a pronoun whose antecedent is in the previous paragraph, or a transitional word bridging a gap in thought.

## **Check the Style**

In general, be on the lookout for lengthy, obscure sentences; wordiness; pretentiousness; overuse of the passive voice; and imprecise language. Read your work aloud, noting the parts where you stumble or misread and the parts that sound dull and boring, even to you. Pump more energy into those parts by substituting action verbs and concrete nouns.

Then, use this three step process to tighten up the style:

- **Cut.** Eliminate words or phrases that don't pull their weight.
- **Rearrange.** Put the ideas you want to emphasize at the beginning or the end of sentences, the places of natural emphasis.
- **Rewrite.** If cutting and rearranging don't work, take more drastic action: scrap the sentence and try it again. Imagine your reader confronting you with, "What are you trying to tell me here?" and then write your answer to that question as directly as you can.

Apply these remedies to every swollen section or infected sentence. All you need is a red pen. Cross out words and phrases that don't say anything. Draw arrows to rearrange words or sentences. Cut out sections that contain irrelevant information. If you need to get it off your computer screen to really see it, print it off. Then you can literally use scissors to cut out the whole paragraphs and use tape to put them in a different order. Rewrite only when editing or rearranging are not effective.

## **Check the Spelling, Grammar, and Punctuation**

Look up the spelling of words you habitually misspell and check if you are doubtful. Be alert to possible problems in agreement or the placement of modifiers; be sure every pronoun has a clear reference. See that your punctuation is both correct and appropriate.

Remember that you can spoil an otherwise good piece of writing by a blatant, distracting error. Since it is very difficult to see your own errors, don't be afraid to have someone else read the piece over, looking specifically for errors in spelling, punctuation, and grammar.

## Test Your Knowledge

### Spelling Test

Identify the correct spelling for each group of words.

#### Group One

- a) acomodate
- b) accomodate
- c) accomodate
- d) accommodate

#### Group Two

- a) arguement
- b) argument
- c) arguement
- d) arguemint

#### Group Three

- a) comitment
- b) comittment
- c) commitment
- d) comitmant

#### Group Four

- a) consensus
- b) concensus
- c) consencus
- d) concencus

#### Group Five

- a) deductible
- b) deductable
- c) deductuble
- d) deductabel

#### Group Six

- a) embarras
- b) embaras
- c) embarass
- d) embarrass

**Group Seven**

- a) existance
- b) existence
- c) existanse
- d) existense

**Group Eight**

- a) foreward
- b) forword
- c) forworde
- d) foreword

**Group Nine**

- a) harass
- b) haras
- c) harrass
- d) herrass

**Group Ten**

- a) occassion
- b) ocassion
- c) occasion
- d) ocasion