

Report Writing

Business and Technical Reports Made Easy

Free sample chapter



Scribe Consulting

Tim North, Scribe Consulting

www.scribe.com.au

Report Writing

Business and Technical Reports Made Easy

This sample may be distributed freely as long as it is not charged for or altered in any way. Scribe Consulting's full range of writing-related e-books may be downloaded from www.scribe.com.au or www.BetterWritingSkills.com.

©2004–11 Tim North, Scribe Consulting, www.scribe.com.au

Document last modified on 26 March, 2011.

This work is copyrighted. All rights are reserved worldwide. No part may be reproduced by any process. Nor may any other exclusive right be exercised without the written permission of its author:

Tim North
Scribe Consulting
16A Montessori Place
Kingsley (Perth) WA 6026
Australia

Table of contents

1	Writing for your readers	1
1.1	What do I need to know to write a report?.....	2
1.2	Q1. <i>Who</i> will read my report?.....	2
1.3	Q2. <i>Why</i> do my readers want my report?	4
1.4	Q3. <i>What</i> will my readers understand?.....	5
1.5	Q4: <i>How much</i> do my readers want?	7
1.6	How do I find all these answers?	7
1.7	How do I keep track of what everyone wants?.....	9
1.8	Headings are a writer’s best friend	10
1.9	What if their needs conflict?	11
1.10	Isn’t this a whole lot of work?.....	11
1.11	Report or proposal: readers first or writer first?.....	13
1.12	What about objectives?.....	13
1.13	Checklist: getting started	14
2	Why write an outline?	15
2.1	Why bother with an outline?.....	16
2.2	How do I make an outline?.....	17
2.3	Structuring a complex report.....	19
2.4	I have an outline. What now?.....	20
2.5	Checklist: writing an outline	20
3	What should be included?	21
3.1	What’s the correct order for the elements?.....	22
3.2	How do I write the covering letter?	23
3.3	How do I write the executive summary?.....	24
3.4	Why should I include acknowledgements?	27
3.5	When do I need a foreword?.....	27
3.6	When do I need a table of contents?	28
3.7	Should I include a glossary? (No!).....	28
3.8	What is the role of the “scope of work” section?	31
3.9	How do I write the background or introduction?	32
3.10	How do I write the body of the report?	33
3.11	How do I write the conclusions?.....	34
3.12	How do I write the recommendations?.....	35
3.13	How do I do the appendices?	36
3.14	Why should I include references?	37
3.15	Checklist: the elements of your report.....	38

4	How do I present my report?	40
4.1	Headings for short documents.....	41
4.2	Heading hierarchies for longer documents	41
4.3	How should I format my headings?.....	45
4.4	Why is the right font important?	45
4.5	What's the best line spacing?	47
4.6	What's the best paragraph spacing?	49
4.7	Email's pretty slack isn't it?.....	50
4.8	How should I do captions?.....	51
4.9	How should I format tables?.....	51
4.10	What's the deal with capital letters in headings?	53
4.11	Checklist: presenting your report well	54
	Appendix 1: Microsoft Word tricks for large documents	56
	Paragraph styles.....	57
	Heading styles	58
	Automatic heading numbering.....	59
	Automatic caption numbering.....	60
	Automatic tables of contents and figures	61
	Appendix 2: Where do I get my information?.....	63
	Introduction.....	64
	Online: Google.....	64
	Online: Amazon.com.....	68
	Online: your intranet.....	71
	Individuals and groups	72
	Publications	73
	Downloadable e-books from Scribe	74

Writing for your readers

1

What is written without effort is, in general, read without pleasure.

Samuel Johnson

Rationale

- It's far easier to inform or persuade your readers if you understand *who* they are, *why* they want your report, *what* they already know and *how much* they want.
- If you just guess at this information, you're likely to write for the wrong people, provide the wrong information and/or pitch it at the wrong level.
- It follows that it's sensible to spend time researching your readers' identities and needs *before* you try writing for them.
- Taking the trouble to write a *good* report, not just a mediocre one, generates benefits for all parties: you, your readers, your organisation and your organisation's clients.

Objectives

You will be able to complete these tasks:

- Explain the importance of identifying your readers and their needs.
- Identify how much detail your readers need and will understand.
- Interview readers in a style that encourages them to identify their needs.
- Create a who-needs-what table to organise your writing.
- Describe a strategy for providing information to diverse groups of readers with different needs.
- Describe a strategy for dealing with conflicting needs.

1.1 What do I need to know to write a report?

So you've been asked to write a report, and perhaps you're feeling a bit lost. The good news is that the process of report writing is one that can be easily learned. Let's start with a simple definition that we'll refine later:

A report is a document that provides detailed information about a subject. Some reports may also offer expert opinions and advice.

Okay then. You'll be offering your readers information and, perhaps also, opinions and advice. Before you can start to write a successful report, it's essential to do the necessary preparation. At a minimum, this requires taking the time and effort to get good answers to these questions *before* you open up Microsoft Word and start feverishly typing:

1. *Who* will read my report?
2. *Why* do my readers want my report?
3. *What* will my readers understand?
4. *How detailed* do my readers need it be?

Let's consider these separately.

1.2 Q1. *Who* will read my report?

Why should the audience affect what I write?

Let's say that your manager asks you to write a short report detailing the most common types of customer complaints for the past year and their causes. He leaves your office before telling you who the audience for the report is.

Consider the possible readership that such a report may be destined to have:

1. The report may be for your manager only.
2. The report may be for your manager and the CEO.
3. It may also be put on your intranet so that your staff can read it.
4. It may also be put on your web site so that your staff and the public can read it.

Would you write the same report in each of these cases? Certainly not. Consider just a few of the issues involved:

Privacy: Some of the complaints may name specific customers or staff. Privacy legislation may require this information to be kept confidential. It may be appropriate for *you* to view these names in order to write your report but certainly not the public.

Politics: If some of the complaints are critical of your manager, you may choose to write your report differently if you know that it will be passed along to the CEO.

Language: Your manager is an engineer, but the CEO has an accounting background. If you're writing just for your manager, it can have a technical tone. If you're writing just for the CEO, it could be more financial. If you're writing for both, you'll probably need to structure it in two sections.

We can draw two essential conclusions from this:

- *The audience for your report should greatly influence what you write (or don't write).*
- *It follows that you shouldn't begin to write your report until you know who's going to read it.*

It's not just who you hand it to that matters

Imagine that your manager has asked you to write a report on capital expenditure for the quarter. You duly write the report and include a detailed accounting analysis because you know he'll understand it. To your surprise, he sends it back and tells you to rewrite it because it's too detailed and too long for the Board.

The problem, of course, is that you assumed that because your manager asked for the report *he* was the only one who'd read it. Surely it's not *our* fault as writers that *he* forgot to tell you that it would be given to the Board?

You know what? I believe it *is* our fault. As writers, it's part of our *job* to know who'll read our material. We shouldn't just assume that we'll be told. We have to ask. We have to check. Knowing who will read our work is so critical an issue that we must take upon ourselves the responsibility to identify our audience. If at all possible, we shouldn't leave this task to someone else.

Know thy audience

The discussion questions on the following page ask you to identify who might read your reports. It's common to hear answers such as *the clients*, *the Government* or *the Board*. The problem with such answers is that they're too vague to be useful.

You can't write well for any group whose name starts with *the* unless you know who is in the group.

For example, how could you write for *the Board* without knowing more about its composition? If you know that your Board consists of four accountants, a banker, an IT manager and an HR manager, you can write with this in mind. (Typical reports may include a finance section, an IT section and an HR section.)

If you don't know who is on your Board, how can you be sure that you'll include all the information they want? How can you be sure that they'll understand what you write? The more you know about *who* will read your work, the easier it is to give them what they want.

In upcoming sections, we'll see how to go about learning more about the needs and level of your audience.

Writing for the public

It should be noted that writing for the public (another group starting with *the*) must be handled with particular care. The public is so diverse in their needs, demographics, literacy and understanding that it's always necessary to write in simple, jargon-free language.

When writing for the public, it may be best to mimic the writing style of newspapers — publications that know this audience well. Such a style involves short sentences, short paragraphs and a simple vocabulary.

Discussion

1. The example above identified several individuals or groups who might read your reports: your manager, your CEO, other staff (via the intranet) and the public (via the web). What other individuals or groups might you be writing for?
 2. The example above identified privacy and politics as two factors that might influence what you put into a report or even leave out of it. What else may influence the content of your report?
 3. How realistic is it in your workplace to expect that you can know in advance who you're writing for?
-

1.3 Q2. Why do my readers want my report?

Let's consider another situation. You're asked to write a report for your local council. The report will describe the levels and probable causes of pollution in a local lake. Remembering what we've discussed so far, you ask your manager who will read the report. He suggests that the following groups will be interested:

- environmental scientists;
- local residents;
- council managers with responsibilities for budgeting;
- town planners.

Later, a colleague mentions that the media may also obtain and read your report. He explains that while they're not usually your intended audience, it may be wise to keep them in mind while you write.

Each of these individuals or groups may have very different interests in the issue. For instance:

- The environmental scientists may want your report to contain the technical information they give you.
- Local residents may want it to be short and in plain English.
- The council managers who have to prepare next year's budget may want your report to spell out exactly how these issues will affect costs and budgets.

- The town planners may want your report to indicate any necessary changes to drainage.
- The media may search your report for indications of inefficiency or poor planning.

In practice, every reader (or group of readers) may have different needs that they wish to see reflected in your report. This leads to our next two conclusions:

- *Once you know **who** will read your report, for each of these people (or groups), you have to identify **why** they want it.*
- *In other words, you have to set goals for the report that are based on the needs of the people reading it.*

We'll discuss shortly how to go about getting this information.

Discussion

1. What are some of the needs you've had to satisfy with past reports?
2. How easy is it to learn what people want from your reports?
3. How realistic are people's expectations of what you can deliver (and when)?

1.4 Q3. *What will my readers understand?*

The Goldilocks question: Is it too hot, too cold or just right?

Imagine that a colleague asks for your advice on a purchasing decision — be it for a PC, a car, a house or a pet. Ideally, what level of detail should you provide in your answer?

1. I'd give an answer I found technical. They can always find out what it means later.
2. I'd give an answer I found simple in order to be certain that it didn't go over their heads.
3. I'd give an answer at a level I found moderate.
4. I'd give an answer at the level that required the least effort of me.

Let's consider choices 1 and 2. If you provide a very technical answer, you risk pitching the answer too high, and your colleague may not understand your advice. Similarly, if you provide a simplistic answer, you risk pitching the answer too low, and your colleague will learn little or nothing.

It may be tempting to choose answer 3 and say that it's reasonable to pitch your answer at a 'moderate' level; that way it's likely to be about right. But how do you know what level your colleague will find moderate? If you're an expert on the topic, your guess about what constitutes moderate is likely to be too high. And if your colleague knows more than you realise, it may be too low.

Answer 4, while seemingly absurd, may be the most common choice, in practice. Unless we carefully go through this process of identifying the needs of our readers, we risk answering in a way that requires the least effort for us.

We're left, as you may have suspected, with *none of the above*. Of course, you'd try to deliver your answer at the level that best suited your *reader's* level of knowledge, not your own. Naturally, you can't know what this is without first discovering how much he or she already knows.

This leads to a very important conclusion: *It's not enough to be a good writer. You also need to be a good translator.* You're not translating from English to Arabic, or Mandarin to English, you're usually translating from expert to non-expert.

I have to be a translator too?

We can divide our communication with others into three different scenarios:

1. Your readers know *less* than you do.

Let's say that you're an accountant and you need to communicate with non-accountants. You'll need to *translate* down from the language that you're comfortable with to their comfort level. This will involve simplifying your vocabulary and finding analogies to shared concepts.

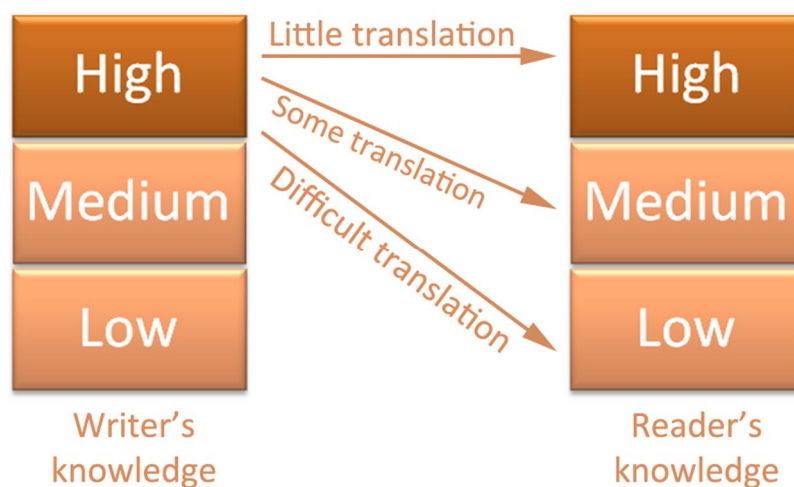


Figure 1.1: Communicating with audiences of differing levels requires varying levels of translation.

2. Your readers know a *similar* amount to you.

If you're communicating with someone who knows a similar amount to you (be it high, medium or low), you can use the language you share, fairly certain that it will be understood. Little translation will be necessary.

3. Your readers know *more* than you do.

If you need to communicate with someone who knows more than you do, *never pretend to know more than you do*. You'll lose their respect and inevitably look foolish. If you're asked to write a report that contains material you're not comfortable with, get a co-author to help you.

Discussion

1. Consider a report that you read recently. Was the level about right for your needs? If not, how did it make you feel?
2. In hindsight, have your past reports ever been pitched at the wrong level? What feedback did you receive?

1.5 Q4: *How much do my readers want?*

Delivering a one-page memo to a reader who was expecting a ten-page report is an embarrassing misunderstanding on your part. So is the reverse.

I was training a group of consultants who had to write reports for a government department. One of their very new staff members (who was present at the training) used to work for that department; they'd hired her away from it. The senior staff were complaining about how long and involved the reports for that department were. They complained how much time they took to prepare and how much this was costing them in billable hours.

The new staff member piped up and said, 'You know, those reports used to come to me. I never used to read them. They were too long.'

Know how much is expected of you. Not only will you be meeting the needs of your readers, you may also save yourself a great deal of time, effort and money.

A reasonable rule of thumb is that most readers will want either a paragraph, a page or ten pages. Know which one they want.

Discussion

- How well informed are you about how much your readers want you to write?
- Is it possible that, in the past, you may have written too much or too little?

1.6 How do I find all these answers?

Okay, so let's review briefly. Before you start to write a report (or a fax, a letter, a memo, an email etc.), at a minimum you need to know these things:

1. *Who* will read my report?
2. *Why* do my readers want my report?

3. *What* will my readers understand?

4. *How much* do my readers want?

We've seen that without researching good answers to these questions, it's unlikely that we'll write a report that will be well received. How, though, do we *get* these answers?

Here's the trick: *ask* people what they want. If you ask someone 'How can I make your job easier?', most people will be more than happy to tell you. Self-interest is a very powerful way of motivating people.

Here's how it might go:

- You: Do you have a moment to discuss the environment report?
- Colleague: Sure.
- You: I've been asked to include a chapter on the levels and probable causes of pollution in the lake. I know that you'll be receiving a copy of the report, so I just wanted to find out what you need me to cover.
- Colleague: Look, I'll be happy as long as you're sure to cover three things. First, ...
- You: Got it. Thanks. One last thing: how technical should the language be?
- Colleague: Keep it fairly simple. I've got to discuss this with the CEO, and he's not technical.
- You: How about I write the environmental-management chapter in plain English and confine the technical details to an appendix at the back?
- Colleague: Good idea.

A conversation like this is good for everyone:

- *Your colleague* is more likely to get a report that meets his or her needs.
- *You* end up better informed about what your colleague needs and are thus less stressed about writing the report. You also end up being praised for writing a good report.
- *Your wider readership* is more likely to be well informed about the topic.

In summary, *most of the effort that goes into a good report takes place **before** you start to write.*

Discussion

1. Is it realistic in your organisation to think that you can get access to all the people that you need to talk to?
2. How else can we find out what our readers need from us?

1.7 How do I keep track of what everyone wants?

To continue with the earlier example, let's say that you approach a variety of your readers in this way and discuss their needs with them. You may discover that they all have different needs. To satisfy these differing needs in *one* report will require you to plan carefully.

For example, you may discover that you're writing for four distinct groups of readers and they each want three topics covered in the report — that's a dozen topics to remember. What's more, each group may want a different level of technical detail and a different length.

That's a lot to keep track of. It can be helpful to create a **WHO-NEEDS-WHAT TABLE**.¹ This displays the various readers (across the top) and their needs (in the leftmost column). For example:

Table 1.1: A completed **WHO-NEEDS-WHAT TABLE** showing reader groups and their separate needs.

	Environ. scientists	Local residents	Finance managers	Town planners
Background information <i>Location, history etc.,</i> <i>Two pages, plain English</i>	✓	✓	✓	✓
Detailed chemistry of the lake <i>pH, concentrations etc.</i> <i>Gary wants all the raw data included.</i>	✓			
Capital expenditure, labour costs etc. <i>Provide detailed accounting for Mike.</i>			✓	
Simple explanation of the chemistry and costs <i>Plain English, one page.</i>		✓		
Drainage plans <i>Which streets will be closed? When?</i> <i>Which gardens will be dug up?</i>		✓		✓
Conclusions and recommendations <i>Plain English, one page.</i>	✓	✓	✓	✓

There are many advantages to such a table:

- If you discover a new set of readers, you can add a new column.
- As readers tell you of their needs, you can add new rows.
- As you learn about the needs of your readers, you can record more details.
- Without such a table, this information has to be remembered or kept in a less organised form. This could lead to you forgetting key issues.
- Each of the needs identified in the leftmost column can become a heading in your report.

¹ A more technical name for this is a **NEEDS-ANALYSIS TABLE**.

- Preparing a who-needs-what table can demonstrate to your manager (and others) that you take your writing work seriously.

Discussion

Would your time be better spent by just 'diving in' and starting to write with less preparation?

1.8 Headings are a writer's best friend

How do you give each of your readers what they demand without boring the other readers with large tracts of information in which they have little (or no) interest?

A reasonable strategy is to write a separate section (or chapter) aimed at each group. For example, write a chemistry section to keep the environmental scientists happy, a costing section for the managers and accountants, and a drainage section for the town planners.

Write each of these specialised sections using the appropriate language for that group.

In other words, it's perfectly fine to use science jargon in a section aimed at scientists, but you shouldn't use it elsewhere in your report. Similarly, only use town-planning jargon in the section aimed at town planners.

What about the needs of readers from a non-technical background? Which sections are written for them?

The answer is *everything else*. Most of your readers will (you hope) read all the nonspecialist sections of your report. These sections should thus be written in a jargon-free style that *all* your readers will understand. In a typical report, this will include the following sections:

- the executive summary;
- the background (or introduction);
- the conclusions; and
- the recommendations.

Discussion

1. Do your existing reports have separate sections (or chapters) for each group of readers?
2. The executive summary, the background, the conclusions and the recommendations will probably be read by all your readers. What other sections may appeal to all readers?

1.9 What if their needs conflict?

There's an old piece of wisdom that says that when you buy a product or service it can be good, it can be fast, and it can be cheap. You can have any two. (If it's good and fast, it won't be cheap. If it's good and it's cheap, it won't be fast. If it's fast and cheap, it won't be good.)

This is a simple yet insightful observation. It reminds us that some of our readers' needs may conflict with each other. For example, Carol may need the report by the end of the month. Bob may need it to contain details that won't be available until a week later.

What do you do if your discussions with the various parties reveal conflicting needs?

A reasonable strategy is as follows:

- Gently remind each of the parties that the report is also for parties other than themselves. Tell them that you're required to satisfy the needs of many different masters at once. Some colleagues will feel sympathy for your plight and may be willing to relax their requirements a little when they realise that they aren't the only person involved.
- If this doesn't work, ask the conflicting individuals to work with each other to come up with a mutually agreeable compromise.
- If that doesn't work, then (and *only* then) go to someone higher in the organisation and ask them to rule on what needs your report will and won't be able to meet. Try not to overuse this technique, though, as it can lead to resentment.

Discussion

1. What types of needs can sometimes be in conflict?
2. How else might you deal with your readers' conflicting requirements?

1.10 Isn't this a whole lot of work?

There's an old joke that goes like so: A guy gets into a cab in New York City and asks the driver, 'How do I get to Carnegie Hall?' The cab driver replies, 'Practice, practice, practice'. Okay it's not very funny, but we can adapt this joke to writing, like so: How do I write a great report? Preparation, preparation, preparation. Here's how it may work in a typical office.

Imagine that your manager summons you and a colleague, who we'll call Bob, into her office, early on a Monday morning. She tells you that she needs you both to separately write important reports but only briefly details what should be in them. Neither of you have written these types of reports before, and you both feel a bit overwhelmed by your tasks. She ends by telling you both that your separate reports are due 4.00 p.m. Friday.

Bob returns to his cubicle, fires up Microsoft Word and starts typing. You applaud his enthusiasm but feel he's going about his report the wrong way.

Instead, you wander the halls and find a senior colleague. You ask him who he thinks would read the kind of report you've been asked to write. He tells you that the lawyers will probably

go over it with a fine-toothed comb and the accountants should want plenty of say in what goes into it. You spend much of the rest of the day finding and taking meetings with legal and accounting colleagues. Come the end of the day, you have a detailed who-needs-what table taking shape.

The next day, having slept on the problem, you wander over to the HR office. You ask the HR manager if she's interested in the subject matter. She is. She tells you that she's pleased you asked her for input because she's sick of having to send reports back. She details what she'd like to see in the report, and you add her comments to your who-needs-what table.

Returning to your cubicle, you start Microsoft Word and create a series of headings based on the information you've gathered from your colleagues. You write a few lines under each heading then take this outline back to one or two of the colleagues you spoke with yesterday. They like it and make a few helpful suggestions. You return to your cubicle and begin incorporating them into your outline.

Bob pops his head into your office, and you're surprised to discover that it's lunchtime already. Over lunch, he asks you how you're coming with your report. You tell him that you haven't really started. He's shocked and tells you he's two-thirds of the way through his. You congratulate him but wonder how he can know what other people need without having asked them. After all, it's taken you a day-and-a-half just to find out who's going to read it, what they want, what type of language to use and how much to write.

Over the next few days you work hard on your report. Come Thursday afternoon, you have a draft that you're satisfied with. You email it to a few people and ask to discuss it with them on Friday morning. Most don't have time to read it that soon and decline to help. The HR manager says she'll read it on the way home, though, and will talk to you on Friday morning. She does, and makes minor suggestions, which you incorporate into the report prior to turning it in Friday afternoon. Bob smugly tells you that he handed his report in on Wednesday.

The following week you're both summoned to your manager's office. Bob is handed his report together with a long list of change requests from the people who've read it. He's told to do a second draft and leaves annoyed. Your manager praises you for a good report and tells you there's a bright future ahead of you.

Okay, okay. That's a long — and yes contrived — story, but it makes several points clear:

1. It's difficult to satisfy your readers without suitable research and preparation:
 - *Who* is going to read it?
 - *Why* do they want it?
 - *What* will they understand?
 - *How much* do they want?
2. Doing this research tends to *lessen* your workload, not increase it, as it makes rewrites rarer.
3. Most people don't write especially well, so it's relatively easy to carve out a niche in most workplaces as 'the good writer'. This can only help your career.

1.11 Report or proposal: readers first or writer first?

Writing can be divided into two significantly different styles: You can write primarily to serve the needs of the *readers* or the needs of the *writer*. I contend that you must choose one or the other before you begin.

This is also the essential difference between a report and a proposal:

- Reports are an act of service in which the writer tries to satisfy the needs of the readers. They aim to *inform* your readers about the subject.
- Proposals are written to further the self-interest of the writer (or the writer's department, company etc.). They aim to *persuade* your readers to do something (or believe something).

Given how different these objectives are, it is not surprising that reports and proposals are written in very different styles. It is thus *essential* that you decide which type of document you intend to write before you begin planning or writing.²

Always ask yourself: 'Who is the primary beneficiary of this document: my readers or me?'

Discussion

1. Does this distinction between reports and proposals seem reasonable?
2. A document can be both informative and persuasive. Do you need to have one of these as your primary goal when you start to write?

1.12 What about objectives?

It's worth mentioning that many sources of advice on report writing talk about identifying your *objectives* for your report. In this chapter, I've suggested that you concentrate on identifying *readers' needs* instead.

Setting objectives can cause you to think in terms of what *you* need from the report. (*My objectives are ...*). Whereas, concentrating on your readers' needs helps you to focus on what *they* need. It's a subtle but important difference.

² This manual discusses report writing. For more information on proposal writing see *Business Proposal Writing Made Easy* available here: www.scribe.com.au/ebooks.html.

