

Chapter 10: Informal Reports

Chapter Overview

Reports are used in business for a variety of reasons, such as helping others stay informed, review opinions, plan for the future, and make decisions. Reports are written using information that can be confirmed.

Reports can be used to distribute information, and they may require no persuasion. However, analytic and recommendation reports require data presentation and interpretation. You may be asked to make recommendations based on the facts presented. Therefore, you may need to persuade the reader that your views are valid and that the conclusions drawn are legitimate.

Reports need to be written so that they can easily be read in a busy work environment. They also need to be well written. There are three key features of quality reports. They are

1. **content:** information is organized around the reader's needs.
2. **clarity:** information is easy to understand from the reader's point of view, and it is well written, using standard English.
3. **skimmability:** the report is organized around effective headings, the font used is easy to read (both in terms of size and the typeface), and white space is used effectively for organization.

Informal reports are usually under ten pages. They are written using relatively informal language. For example, contractions such as *can't* may be used. These reports are usually written in letter or memo format, but still include headings and subheadings.

Formal reports, on the other hand, are more complex than informal reports and can be from 5 or 6 pages long to a few hundred pages. The writing style is more formal, and the report has a more standard format, including information typically organized into 6 basic parts. These reports also have a separate title page and additional front matter, such as a table of contents.

Reports can be written in a direct or indirect manner. Direct approach reports often have sections in the following order:

- Purpose/Information/Background
- Facts and Findings
- Summary

However, analytical reports, which are written persuasively, often follow this format:

- Introduction/Problem/Background
- Conclusions or Recommendations
- Facts and Findings
- Discussion and Analysis

Report writers use headings to help them organize the report while it is being written, and also use headings to help the reader navigate the report. Headings break the text into meaningful chunks for the reader and this makes the information easier to process. Headings can be divided into different levels that break the information into smaller chunks, but this has to be done so that the reader understands the connections. When creating headings, you need to ensure they are short and clearly written using a parallel structure. The headings also have to relate to the information that follows.

Sample Headings

Introduction

Background

Relevant Changes

Improved Services

Future Developments

Conclusions

Note that the headings are all parallel (which means they are all written using an adjective and noun, or just a noun). This helps the reader see where one section begins and another ends. You can also use headings that are more elaborate, but again you need to ensure you are using the same format for all.

Sample Headings

The Problem Being Faced by ABC Corporation

When This Problem was First Discovered

What Needs to be Changed to Fix the Problem?

How Will Improved Service Help Fix This?

Where Will We Go from Here?

The Conclusions Being Drawn

In the above example, you note that each heading is either a statement or a question. In this case, the headings are all parallel. It is important to remember that you can't use the headings as an introduction to your following paragraphs. See the following example.

Problems with Product Codes

~~These~~ are occurring frequently....

Instead, lead the first paragraph with a noun. See the example below:

Problems with Product Codes

Product code problems are occurring frequently ...

Before writing a report, you need to plan carefully. You need to consider the time limit you have. Is there additional personnel available to help you complete the report?

COMMUNICATING FOR RESULTS: A Canadian Student's Guide, Second Edition

Do you have a budget? You also need to collect data that is current, reliable, and valid. If you are using any secondary sources, you need to keep track of that for proper referencing later on. Use an outline to help stay organized so that you do not forget anything while you are writing.

Informal reports consist of the following sections:

Introduction

- States the purpose of the report or may link the purpose of the report with report recommendations
- Specifies the problem or technical question the author will deal with
- Provides key points or establishes the limit of the report
- Often includes a description of the methods used to collect data

Findings

- Is the most substantial section of the report
- Reinforces the logical connection between relevant facts and conclusions or recommendations
- Often organized under different subheadings

Summary/Conclusions

- Is often the section readers are most interested in
- Presents the objective analysis directly related to the report's findings
- May include specific suggestions or recommendations for actions that will solve the problem

Graphics and visuals add greatly to reports. They help the reader see what you are saying. Graphics and visuals should support your words and reinforce the message you are sending. Graphic and visuals include charts, graphs, tables, and illustrations. A few guidelines need to be adhered to when creating visuals or deciding which graphics to include. First of all, the visuals should be clearly labelled. Also, they need to be placed as close to the written information as possible so that they clearly illustrate your point. The information presented needs to be accurate and it needs to be uncluttered. Finally, it needs to be included for a reason.

Chapter 10 in your text provides very clear examples of visuals and graphics. There are some additional points to remember when creating visuals. If you are using pie charts or bar charts, you need to consider whether the report is being printed in colour or black and white. If it is in black and white, the shading and pattern choice is very important. If you choose shades or patterns that are not distinct from the neighbouring section, the visuals may not actually show what you intend. Use contrasts that clearly display your information. Also, if you are creating a pie chart, make sure the total of all the individual sections equals 100. Figure 10.20, the Graphics Quick Reference Chart on p. 311, provides a handy summary of the different types of graphics and their uses.

There are two commonly used short reports in business communication: the informational report and the analytical report.

Informational reports have a specific purpose, to collect data and present it clearly and directly, without analysis or persuasion. These reports provide information about

different kinds of activities: **ongoing activities** that need to be monitored at regular intervals, and **non-routine, case-by-case situations** that must be accounted for and reported to management. Learning how to write informational reports is good practice for the greater challenges of **analytical reports**, which pass on information with the intent of persuading readers to follow a specific course of action or recommendation that is supported by the reasoning of the report's findings and conclusions.

Finally, after you have completed your report, it helps to review it and make sure you have included all the information you said you would. Make use of the checklists provided in the text book. These checklists will help you complete a report that is professional and comprehensive.

Learning Objectives

In this chapter the student will learn to

1. Identify the characteristics of an effective business report.
2. Differentiate between informal and formal reports and between informational and analytical reports.
3. Identify standard report formats.
4. Apply direct and indirect writing plans.
5. Identify steps in the report-writing process.
6. Describe types of reports according to their purpose.
7. Organize reports according to their purposes and apply informative headings.
8. Develop graphics that are meaningful and interesting.

Key Concepts

alphanumeric outline	an outlining system that combines numbers and letters to differentiate levels of headings. (p. 297)
analytical report (or recommendation report)	a report that interprets and analyzes information and offers recommendations based on findings. (p. 291)
bar chart	a visual consisting of parallel horizontal or vertical bars of varying lengths, each representing a specific item for comparison. (p. 302)
business report	a document in which factual information is compiled and organized for a specific purpose and audience. (p. 288)
conclusions and recommendations	the closing section of an analytical or recommendation report in which specific actions are proposed to solve a problem or aid decision-making. (p. 299)
decimal outline (or numeric outline)	an outlining system that uses a combination of numbers and decimal points to differentiate levels of headings. (p. 297)
descriptive head (or talking head)	a heading that describes the actual content of a report and provides more information about it. (p. 294)
deviation bar chart	a specific type of bar chart that shows positive and negative values. (p. 304)

feasibility report	an analytical report that evaluates whether a project or alternative is advisable and practical. (p. 313)
findings	the most substantial part of a report, in which qualitative and numeric data is presented and organized by time, convention, order of importance, or component. (p. 298)
flow chart	a diagram that maps out procedures, processes, or sequences of movement. (p. 309)
formal report	a business document of ten or more pages based on extensive research and following a prescribed format or pattern that includes elements such as a title page, transmittal or covering letter, table of contents, and abstract. (p. 289)
functional heading	each of a series of generic headings that, when taken together, show a report in outline. (p. 294)
Gantt chart	a bar chart that is used to show a schedule. (p. 308)
grouped line graph	a line graph that makes comparisons between two or more items. (p. 307)
heading	a title or subtitle, usually a word or short phrase, within the body of a document that identifies its parts and gives clues to its organization. (p. 293)
incident report	a short report that documents problems and unexpected occurrences that affect a company's day-to-day operations. (p. 312)
informal report	a report using a letter or memo format, usually running from a few paragraphs to ten pages in length. (p. 289)
informational report	a short report that collects data related to a routine activity without offering analysis or recommending action; it is organized in three parts: introduction, findings, and summary/conclusion. (p. 291)
introduction	the first section in the body of a report, which provides readers with the information they need in order to understand and evaluate the report itself; it must include either the report's purpose or a statement of the problem the report addresses. (p. 298)
investigative report	a report written in response to a request for information about a specific problem or situation. (p. 312)
justification report	an analytical report that justifies the need for a purchase, investment, policy change, or hiring. (p. 313)
letter report	a short, external report presented in letter format. (p. 292)

line graph	a visual that uses lines on a grid to show trends according to the relationship between two variables or sets of numbers. (p. 307)
matrix	a word table containing qualitative information rather than numerical data. (p. 301)
memorandum report	a short, internal report presented in memo format. (p. 291)
one-time report	a report that presents the results of a special or long-term project. (p. 291)
organizational chart	a diagram that shows how various levels or sectors of an organization are related to one another. (p. 309)
periodic report	an informational report that is filed at regular intervals. (p. 291)
picture graph	a visual that uses pictorial symbols to represent particular items. (p. 306)
pie chart	a circular diagram presenting data as wedge-shaped segments showing proportions or percentages of the whole. (p. 302)
progress and activity report	a short report that provides information on the status of a project, including current work, work done during the time since the previous report, and work to be completed in the next period. (p. 320)
proposal	a document presenting plans and ideas for consideration and acceptance by the reader. (p. 314)
recommendation report	an analytical report that recommends action, often in response to a specific problem. (p. 313)
segmented bar chart (or divided bar chart)	a visual consisting of a single bar divided according to the different portions that make up an item as a whole. (p. 303)
summary	the closing or second-last section of a report that briefly restates its main points. (p. 299)
table	a chart that presents data, usually numerical, in a compact and systematic arrangement of rows and columns. (p. 300)
trip report (or conference report)	a short report that summarizes the events of a business trip or conference. (p. 314)
visual aids (including charts, graphs, tables, and illustrations)	materials that present information in visually appealing ways to show trends and relationships, represent numbers and quantities, and make abstract concepts concrete. (p. 299)

Review Questions

1. What are some differences between an informal report and a formal report?
2. When should an author use the indirect approach when writing a report?
3. Why should you use headings in a report?
4. What are the three major steps in the writing process?
5. List the different visual aids/graphics that you can use to enhance your report.
6. Give examples of commonly used short reports.
7. What is the key difference between an informational report and an analytical report?
8. What is a feasibility report?

Answers

1. The following are some differences between informal and formal reports: (p. 289–290)

<i>Informal reports</i>	<i>Formal Reports</i>
<ul style="list-style-type: none">• Memo or letter format• Informal wording, use of contractions• Usually from a few paragraphs in length up to 10 pages• Usually internal• Has fewer headings and is less structured• Visual aids are used infrequently	<ul style="list-style-type: none">• Include front and back matter• Written in formal standard English• From 5–6 pages in length to a few hundred• Usually external• Have more headings and are more structured• Visual aids are used frequently

2. The indirect approach should be used when the audience needs to be persuaded to accept the findings of the report. (p. 293)
3. Headings help the reader navigate the report and help organize information into easily understood chunks. (p. 293)
4. The three major steps in the writing process are: planning, researching/analyzing data and information, and composing and revising. (p. 295)
5. Reports can be enhanced by using the following visual aids/graphics: table, matrix, pie chart, bar chart, line graph, flow chart, and organizational chart. (p. 311)
6. The following are some commonly used short reports: (p. 313–314)
- periodic reports
 - situational reports
 - incident reports
 - investigative reports
 - compliance reports
 - recommendation reports
 - justification reports
 - feasibility reports
 - summaries
 - to-file reports

COMMUNICATING FOR RESULTS: A Canadian Student's Guide, Second Edition

- proposals
7. The key difference between an informational report and analytical report is that the purpose of informational reports is to collect data and present it clearly and directly, without analysis, conclusions, or persuasion. In contrast, the purpose of an analytical report is to pass on information with the intent of persuading readers to follow a specific course of action or recommendation that is supported by the reasoning of the report's finding and conclusions. (p. 333)
 8. A feasibility report is an analytical report that evaluates whether a project or alternative is advisable and practical. (p. 313)