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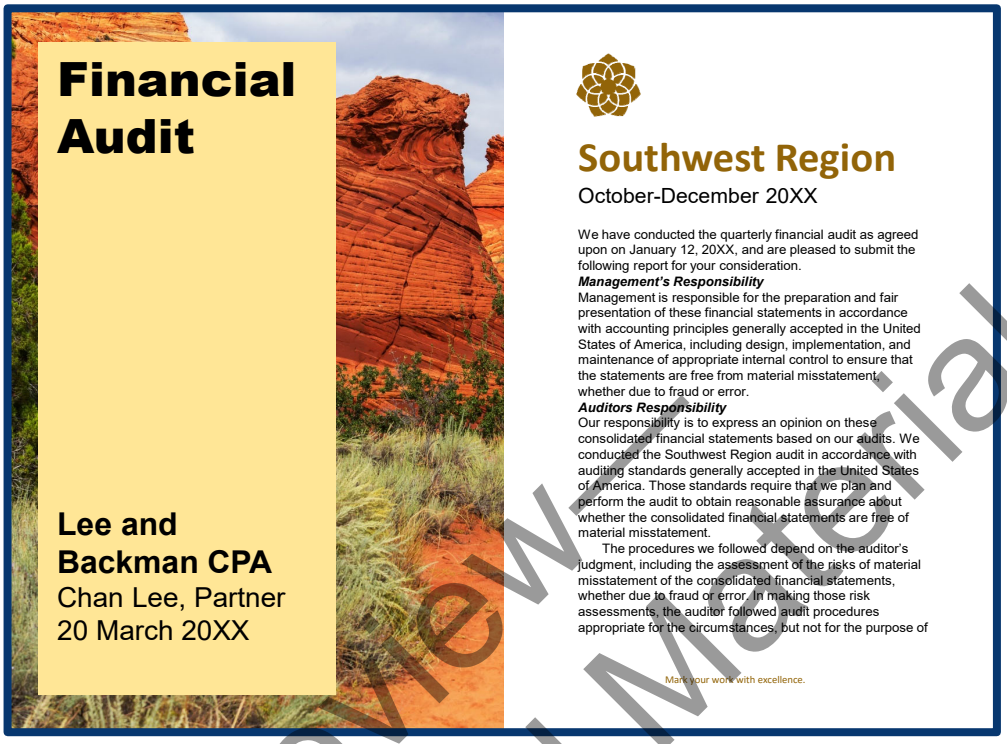


Writing Business Reports

Imagine yourself sitting in a marketing class. Your professor assigns you to analyze and to evaluate the websites of two companies and to create a written report of what you find. When you hear the words "written report," what goes through your mind? You might think of words like "long," "difficult," "boring," "confusing," "long hours," "where do I even start," and "late nights." The thought of having to write a report brings negative emotions into the heart of most people.

Despite these negative emotions, reports are important for all professional organizations. Reports provide information vital to managers who must make ongoing decisions about finance, marketing, purchasing, operations, and personnel. Reports help managers identify problems and trends and take appropriate action.

In many cases, the impact of one report may be greater than the impact of hundreds of short, routine messages (see Figure 10.1).

This chapter describes business reports and tells how they explains how they are used in today's professions. It also describes the process of creating four major types of reports—progress, performance, compliance, and analytical. After learning the material in this chapter, you should be able to do the following:

1. Describe the difference between routine organizational messages and reports.
2. Describe the sections of long business reports.
3. Write four types of business reports.
4. Demonstrate how to review and revise reports.

Figure 10.1 One major report may have greater organizational impact than hundreds of short messages.

Definition of Business Reports

Reports are different from ordinary interpersonal messages in a variety of ways. Ordinary business messages are usually short, informal, transactional documents written about a wide variety of day-to-day activities. In contrast, business reports are often the result of important investigations. On average, they are longer and more formal than ordinary transactional documents and are written to address significant problems or issues. For example, Robert Mueller, Special Counsel for the United States Department of Justice, investigated Russia's suspected influence in the United States 2016 elections. The investigation took nearly two years to complete and resulted in a report of almost 450 pages. Table 10.1 summarizes some of the major differences between business reports and business messages.

Table 10.1 Characteristics of Business Messages and Business Reports

Common Characteristics of Business Messages	Common Characteristics of Business Reports
▪ Relatively short; usually less than a page	▪ Longer than routine messages; usually multiple pages long
▪ Usually about routine, transactional matters	▪ About specific problems, issues, or needs
▪ Written with conversational language	▪ Written with more formal language
▪ Written at all levels in organizations	▪ Written for managers
▪ Formatted as texts, messages, and emails	▪ Formatted as long, short, and slide formats
▪ Reflect various levels of objectivity	▪ Emphasize facts and objective analysis
▪ Include few visuals	▪ Often contain tables and graphs

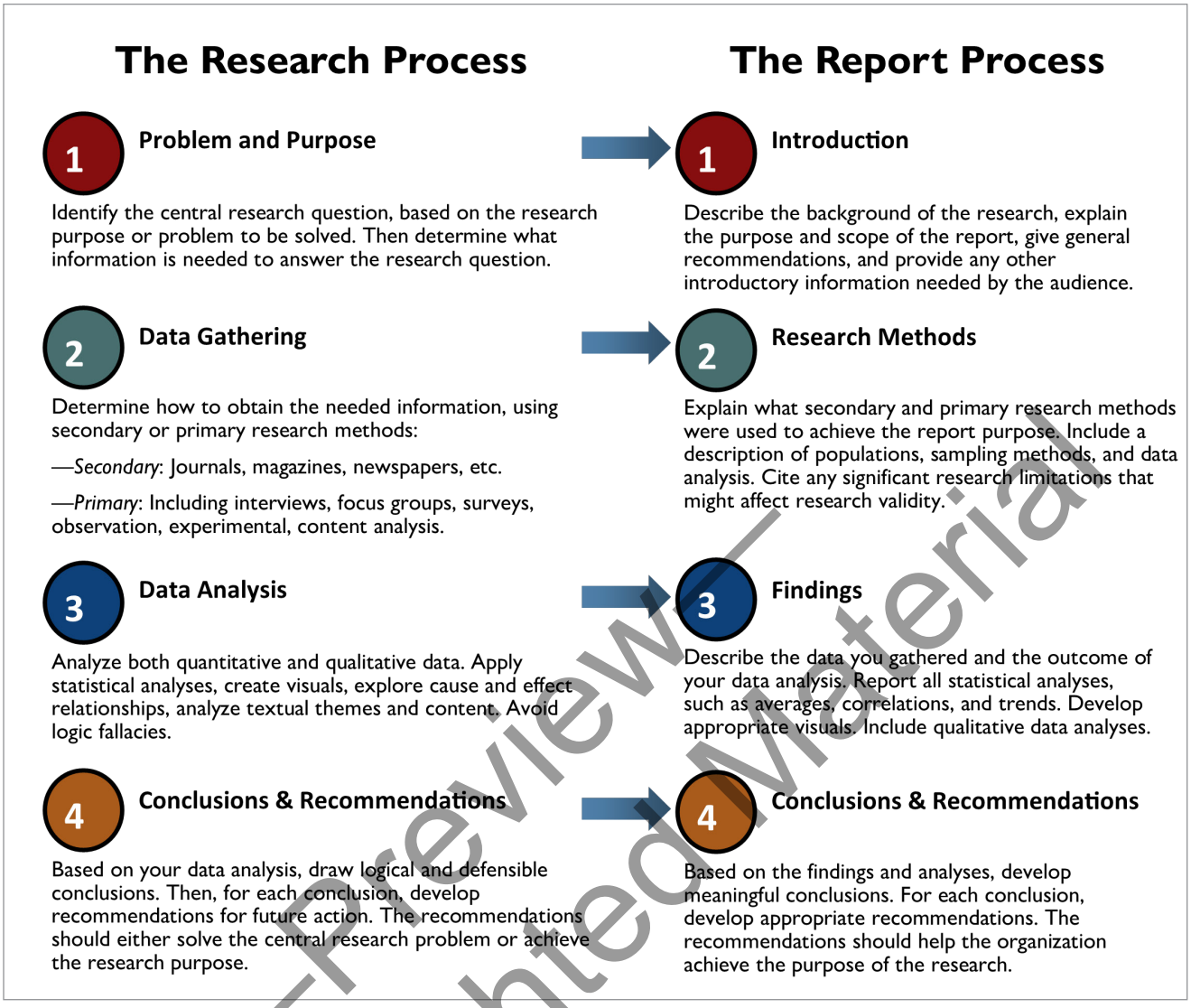


Figure 10.3 Side-by-side comparison of researching and writing reports.

Planning the Report

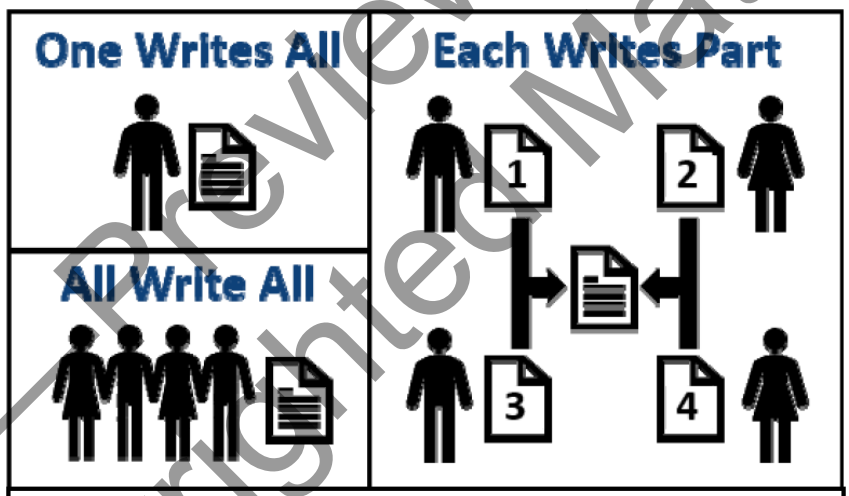
As with all professional communications, complete a PACS plan before you begin.

1. Clarify the specific purpose of your report so you maintain a clear focus as you compose. As with business messages, business reports have three main purposes—to inform, to persuade, and to strengthen relationships. Informative reports transmit useful information. Persuasive reports transmit information and give recommendations for action. All messages give you an opportunity to strengthen your relationships with all who will read your reports. If you do a good job of report writing, your reputation as an effective problem solver and communicator will be enhanced.
2. Analyze the audience so you can tailor the report for their unique wants and needs. Consider all relevant demographic and psychographic factors.
3. Ponder the context in which the communication occurs. Think of your own context and the context of the audience, including financial, operational, and all other factors that bear on this specific situation.

	A	B	C	D	E	F
1	**Report Writing Assignments**					
2	**Assignment**	**Writer**	**1st Draft**	**Reviewer 1**	**Reviewer 2**	**Final Draft**
3	Introduction	Conover	9-Jun	Ingo	Gresham	23-Jun
4	Methodology	Conover	16-Jun	Ingo	Gresham	23-Jun
5	Data Analysis	Ingo	16-Jun	Gresham	Conover	23-Jun
6	Conclusions	Gresham	9-Jun	Conover	Ingo	23-Jun
7	Recommendations	Gresham	16-Jun	Conover	Ingo	23-Jun
8	Appendix	Ingo	16-Jun	Gresham	Conover	23-Jun

Figure 10.4 A simple worksheet can help you manage writing tasks for team members.

3. **Create an outline**. Create a good working outline so team members know how their individual work fits in with the overall document.
4. **Assign tasks**. Decide who is going to complete the writing, reviewing, and revising tasks for each part of the document. Decide also who will do the final proofreading and production, including layout and design, headings, and graphics (see Figure 10.5).



Team Writing Projects

One Writes All. One person writes the entire document. Team gives feedback. Consistent style but unfair workload. Works well for short documents.

All Write All. The entire team composes together. Consistent style, but can be tedious, frustrating, and inefficient. May work reasonably well for very short documents.

Each Writes Part. Team members divide and delegate the writing and share in giving feedback. Time efficient and equitable workloads, but inconsistent writing style. Works well for long documents. Delays can occur when deadlines aren't met.

Figure 10.5 Teams can divide writing tasks in many ways, with varying costs and benefits.

If multiple authors have contributed to the report, alphabetize them by their last name, except for the team leader or lead author, who should be listed first.

Table of Contents. A table of contents is important for longer documents for two reasons—it gives an overview of the report structure and gives the page numbers where various report sections begin. As you prepare a table of contents, do not put the table of contents itself as an item in the table of contents! Some formal reports contain additional tables, such as tables of figures, tables of illustrations, and so forth as needed.

Executive Summary. The executive summary is quite short—usually only one or two pages long—but it contains all the critical information needed by managers in case they don't read the full report:

- Background information, including the purpose of the report.
- Description of the methods used to gather and analyze the data.
- Listing of the major conclusions and recommendations.

Make sure the summary flows logically from beginning to end—first, here is why we conducted this investigation; second, here is how we gathered and analyzed the information; and third, here is what we conclude and recommend as a result of our study. Also make sure the executive summary is easy to read. Create bite-size information chunks and use headings and bulleted or numbered lists to make the information easy to read (see Chapter 4).

REPORT. To better understand the role of business reports, assume that you work for Western Bakeries, Inc., a company that owns numerous bakeries throughout the western United States. Two years ago, your company acquired a three-store bakery operation in Northern California, Tony's Bakeries, which has been declining in profitability ever since. Your manager assigns you to conduct an investigation of Tony's to determine what is causing the downward trend.

Figure 10.6 Business reports are written for numerous situations and in all types of businesses and professional organizations.