

16. Planning is key!

Before you start writing, take some time to plan your report. This will make your writing much stronger and easier to understand for your readers. Here's what you should do:

- Figure out your goal. What do you want people to learn or do after reading your report? Is it to inform, explain, influence, or something else?
- Think about your readers. Who will be reading your report? Are they experts or beginners? How much time will they have to read it? Knowing this will help you choose the right words and level of detail.
- Gather the information you need. What facts and details do you need to support your goal? Make a list of questions you need answers to.

Here's an example:

Imagine you're writing a report about a kitchen accident. Your goal is to find out how an employee got hurt by a mixer. Here's how you might plan your report:

- What happened in the accident?
- How badly was the employee hurt?
- Was the employee trained on how to use the mixer safely?
- Was the mixer broken or not working properly?
- Could the accident have been prevented?

By planning your report first, you'll save time and write something clear and helpful for your readers.

The second step is to consider the overall structure. Reports come in a variety of shapes and sizes and are made up of a variety of sections, or components. If you

can design a suitable framework everything else will then fall into place. Always remember this: (tell them what you are going to say, then say it, then tell them what you said). Because it allows you to highlight the most important parts of your report. Also, people tend to remember what they read first and last far more than what they read in the middle of any document (this phenomenon is known as the effect of primacy and recency).

So, give them a beginning, a middle and an end. It is your task to select the most appropriate components to build up each of these main sections.

What options are available to you? All reports have several commonly recognized components, including:

The beginning

- ◆ Title page
- ◆ Foreword
- ◆ Preface
- ◆ Acknowledgements
- ◆ Contents page
- ◆ Summary or Abstract
- ◆ Introduction

The middle

- ◆ Main body, including substructures

The end

- ◆ Conclusions
- ◆ Recommendations

- ◆ Appendixes
- ◆ References
- ◆ Bibliography or Resources
- ◆ Glossary
- ◆ Index.

Do not be concerned about the large number of components that may be used; no report ever uses all of them. However, it is as well to know something about each of these components for two reasons:

- You can then choose the ones best suited to your report.
- You may be asked to include one or more of them.

Let us take a look at the most important of these components. We'll consider the beginning and end first before going on to the middle, the main body of the report.

Title page

Every report should have a title page. This tells the reader (and any potential reader) what the report is about. A good title page will include the following information:

- ◆ The title.
- ◆ The name and position of the person who authorized the report.
- ◆ The name of the author(s).
- ◆ His, her or their position within the organization.
- ◆ The name of the organization.
- ◆ The date the report was issued.

- ◆ Copyright information, if necessary.
- ◆ Its degree of confidentiality.
- ◆ The distribution lists.

1. Title

The **title** should be clear, concise and relevant; restate your terms of reference in your own words. Do not choose a title which is similar to any other report title. Providing a **title** is a good way of keeping the title complex (not simple) while also providing more detail about its content. Make sure the title is more prominent than any headings that appear in the report.

2. Names and dates

The decision about whether to give your first name and any qualifications you may have attained should be dictated. However, as a general rule, people within your organization will not need to be reminded of your qualifications whereas relevant qualifications will add authority to a report which is distributed externally. In the same way, it is not necessary to say that you work for ABC Ltd, if the report is for internal circulation alone. The date on the report should be the date it was *issued*, which is not necessarily the date it was printed. Write this issue date in full to avoid possible ambiguities. For example, 12.8.12 means 12th August 2012, in Britain. In the USA it means 8th December 2012.

3. Contents page

A contents page is essential for any report exceeding three pages. It should be on a separate sheet of paper and it should list the various sections of the report in the order in which they appear. The headings on the contents page must be identical to those

used in the text, with the appropriate page (and/or paragraph) number alongside them. If you have used more than just one or two illustrations then provide a separate list of these below the section headings. Your page numbering and paragraph numbering systems should be simple and consistent.

4. Summary or abstract

This component is particularly useful when you have a diverse readership. It has two functions:

- ◆ To provide a precise of what the recipient is about to read or has just read.
- ◆ To provide an outline of the report if the recipient is not going to read the entire report.

An average manager's reading speed is between 200 and 250 words per minute, and he or she comprehends only 75 per cent of this. It is therefore extremely important to highlight the salient facts and the main conclusions and recommendations, if any. It cannot be written until after the other components of the report. Keep it concise; it should never exceed one page. Do not introduce any matter which is not covered within the text of the report.

A summary could contain just five paragraphs:

- ◆ Intention (your purpose and scope)
- ◆ Outline (what was done and how it was done)
- ◆ Main findings
- ◆ Main conclusions
- ◆ Main recommendations (if necessary).

As a general rule, the more senior the reader, the less detail he or she will require. For this reason, a reader is sometimes sent a summary instead of the entire report. When this is done the cover letter should offer a copy of the full report, if required.

5. Introduction

This section sets the scene. While the title page gives a broad indication of the subject, the introduction tells the reader what it is all about. A good introduction will engage the readers' interest and include everything that they will need to know before moving on to the main body of the report. It will contain certain essential preliminaries which would not be weighty enough individually to justify headings of their own. These might include:

- ◆ Why was the report written? Who requested it, and when?
- ◆ What were your terms of reference? Always refer to these in the introduction.
- ◆ What resources were available to you? (For example, staff, time and equipment.)
- ◆ What limitations, if any, did you work under? What were the reasons for this? (For example, 'The report does not analyze departmental expenditure in June because the figures were not available.')
- ◆ What sources of information did you use? How did you obtain this information?
- ◆ What were your methods of working? A technical report will require a technical explanation of the methods used. (Some writers prefer to provide this information in an appendix.)
- ◆ How is the report structured? Why did you choose this method of presentation? This explanation helps your readers find their way around the report and shows the logic of the layout.

In some reports, the first two of these preliminaries are called aims and the others are known collectively as scope.

Reports should not be anonymous documents, so it is usual for the name and signature of the author to appear immediately below the introduction. Some organizations prefer the signature to appear under the writer's name on the title page. Either way, it is best to sign every copy rather than simply sign and photocopy the master copy. In the case of professional firms preparing reports for clients, it is customary for only the name of

the practice to be given. This indicates the joint responsibility of the partnership. The identity of the author is denoted by the reference.

6. Conclusions

Your conclusions should link your terms of reference (what you were trying to do, as stated in your introduction) with your findings (what you found out, as presented in your main body). They should flow naturally from your evidence and arguments; there must be no surprises. Conclusions should always be:

- ◆ clearly and simply stated.
- ◆ objective and not overstated.
- ◆ written with the likely impact on the reader clearly in mind.

7. Recommendations

Do not make any recommendations unless your terms of reference empower you to do so. While conclusions refer to the past and/or the present, recommendations look to the future. Any comment not concerned with the future has no place as a recommendation. Your recommendations should follow logically from your conclusions. Therefore, once again, there should be no surprises. Effective recommendations are concise and to the point. For example, management may need to know what should be done and by whom to overcome a specific problem; it will not want to be told that some undefined action should be taken by some unidentified individual for no apparent reason.

Your recommendations must also be realistic. If so, do not risk the rejection of a sensible recommendation, and the general undermining of the credibility of your report, by asking for too much. It is not reasonable or feasible to expect it to be fully protected.

So, think carefully about the implications of all your recommendations; talk to the

people involved and, where necessary, try to come to sensible compromises.

A good way to check whether your recommendations are well-written is to extract them from the rest of the report and then read them in isolation. Do they still make sense? If not, re-draft them until they do.

17. PRE-WRITING

Take an overview of your report before you begin to draft it. There are five aspects to this (three if you are not making recommendations), namely:

- ◆ Targeting. Remember your readers. It is all too easy to write for yourself and not for them.
- ◆ Outlining: Bear in mind your purpose and objective(s). Make sure your outline (general plan) is just wide enough to encompass them – no more and no less.
- ◆ Structuring: Refer to your structure framework. Is it still the most suitable, or will it need to be revised, perhaps to highlight some particularly important findings?
- ◆ Developing: What will you recommend to overcome the problems identified?
- ◆ Checking: Are you sure that these recommendations are practicable?

18. Summary

While these sections are all important, you must pay particular attention to your summary. Make sure that the overall opinion is expressed accurately and unambiguously, and reflects the findings and comments given in the main body and appendices. It must be a true summary of the report and should highlight any areas requiring a particular emphasis. As already stated, the summary should stimulate the readers' interest by outlining:

- ◆ The salient facts.
- ◆ The main conclusions and recommendations.

Remember that it is intended to serve two overall functions:

- ◆ To provide a precise of what the recipient is going to read, or has just read.
- ◆ To provide an outline of the report if the recipient is not going to read any more of the report. A summary must be interesting; if a reader finds it boring, the report will have failed.

19. Checking and Adjusting the Report

Holding it for two weeks is a classic rule in advertising. For the report writer, this may not be practicable. However, once you have completed your first draft, try to forget all about it for a few days – or at least a few hours. Then re-read it. Does it flow? Are there adequate links and signposts for the reader? Can you justify everything that you have written?

Finally, ask yourself whether you would be willing to say what you have written to the recipients, face-to-face. If you would not be willing to say it, do not write it either. Now print a copy of the document you have prepared on your word processor. It is usual for three people to be involved in checking and adjusting this first draft:

- ◆ yourself
- ◆ a colleague
- ◆ your line manager.

20. Your check

Once again, read it very carefully. It is far easier to spot mistakes and other shortcomings on a printed document than onscreen. Look out for any factual or word processing errors, or instances of poor presentation, including unrequired or inconsistent:

- ◆ variations in size or style of lettering
- ◆ headings and subheadings
- ◆ numbering