

REPORT WRITING

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Introduction

A report is a presentation of facts and findings, usually as a basis for recommendations; written for a specific readership, and probably intended to be kept as a record.

When some people write a report, that's all they do: write. But the really successful writers only spend part of their time doing this, and then only towards the end. Before that, they are planning their report - thinking about its purpose, and who is going to read it; deciding what to put in it, and fitting it into shape. And even when they're finally writing it, they'll probably spend just as much time thinking about how best to present their ideas, as actually putting them onto paper.

This guide draws on the experience of such writers, and describes their step-by-step approach, the six stages being:

- Purpose and reader
- Materials and structure
- Style and presentation

The guide has been devised for you to use as a memory aid once you are back at your desk, and working on your next report. We hope that you'll find it helpful, and that you - and your readers - will benefit.

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Purpose and Reader

Experienced writers always allow plenty of time for these - the first two stages in report writing, even when they are working against the clock. They know that once these are clear in their minds, they'll save themselves hours of work and worry later on.

1 Defining the purpose

First, the purpose - the major aim - the reason why you are writing the report at all. This will determine what *kind* of report you write.

a) *Factual report*

For example, it may be to *inform* - when, say, there's been an accident, or a new programme of work. What's needed here is a factual report - a straightforward statement of the facts - to give people an accurate record.

b) *Instructional report*

Or, it may be to *explain* - for example, when some change is introduced, like a revised appraisal system, or a new job evaluation scheme. Here you write an instructional report - a step-by-step description - to tell people about the new procedures.

c) *Leading report*

Lastly, it may be to *persuade* - when you are trying to sell your ideas. This kind is usually called a 'leading' report, because you are leading the reader towards making a decision - the one *you* want him or her to make.

Once the major aim has been defined in this way, subsidiary aims will fall into place - thus, we inform in order to *explain*, and inform and explain in order to *persuade*. And usually the result will be a leading report - which is often the most difficult to write, because it has to motivate the reader to *do* something at the end.

2 Identifying the reader

But who is the reader? What do we really know about them? Often, they are just a dim and shadowy figure in the mind, but we can usually get a clearer picture by asking three questions:

a) *What does the reader know?*

Two common mistakes in report writing are to overestimate a reader's knowledge-and blind them with science, or to underestimate it - and bore them to tears. We must always try to discover how much the reader knows already, so that we can communicate at *their* level of knowledge.

b) *What are the reader's attitudes?*

However good our ideas, they may get thrown out if we don't take account of these, the reader's special interests, likes, and dislikes. The truth has many faces, and it is only sensible to feature the one most likely to appeal to them.

c) *What does the reader really want?*

The reader is rarely a passive recipient of our report, to be swayed this way and that by our arguments. We'll need to find out just what their hopes and expectations are. Then we shall know what we're up against, and can prepare *our* case accordingly.

Sometimes, it is difficult to answer these questions, especially when writing for a varied readership. In such cases, aim for the important reader - that is, the most important to you - but without offending others. Some are probably only on the distribution list anyway for reasons of prestige or courtesy, or because no-one remembered to cross them off. They will probably be quite happy just to read the opening *summary* (see p.7).

3 Setting the objective

Matching the purpose to the reader, we are now ready to set our objective. In other words, what do we want the reader to *think* and *do* after reading our report? Here is an example:

To persuade the managing director to authorize a proposed system of flexible working hours.

Notice the words '*to persuade*' and '*to authorize*'. They show that we must produce a logical and consistent case: one that will spur our reader to positive action. Also, once we have set the objective, we can usually anticipate the likely problems in meeting it, eg:

a) Knowledge

The managing director is a busy man, and has never heard of flexible working hours. We'll need to give him ample background information, and define any technical terms as we go along.

b) Attitudes

He is a stickler for discipline and good timekeeping. We'll have to convince him that the scheme won't be a licence for lateness, but that, on the contrary, timekeeping might actually *improve*.

c) Wants

According to the grapevine, he is worried just now about rising costs. So we'll need to stress how flexible working hours would actually save him money, even if this means playing down other benefits.

Arriving at an objective like this is the most important step in writing any report. Sometimes the process will even show that a report is not necessary at all, and that the objective can best be met in some other way - in which case, you will have saved yourself a great deal of time and trouble.

Materials and structure

Most writers imagine that their report will be the major event in the reader's day, when, in reality, the poor fellow is awash with reading matter, drowning in facts, figures, and opinions. What he wants is easily-digested information, and then only enough to help him reach a decision. So the *content* of our report, and its *structure*, must be very carefully planned.

1 Selecting our material

The two golden rules to follow when deciding what to put into a report are:

- a) *Simplify*, and be ruthless about it. Reject the irrelevant, agonize over the doubtful, and make sure you've got the essential.
- b) *Justify* your conclusions with facts, and state their sources. Build the facts into a logical and consistent case, so as to lead the reader to the same conclusions as your own.

2 Planning the structure

The facts themselves should therefore be a set of directions, which will lead and guide your reader along a route. This route has to be planned *before* you write your report, perhaps as follows:

Turn a large sheet of paper sideways, and work across it. Work *horizontally*, so that you can see the whole plan of your report at one time (see p.6).

First, divide it into major sections. Every subject can be broken down in this way, and the headings will probably become the headings in your report.

Make a list under each heading of all the points you would *like* to mention. Note the information that you'll need to support them.

Now mark the most important points, the essential steps in your reasoning.

Next, mark the least important ones, points your reader would find irrelevant. These you will probably reject.

The points that remain-the unmarked ones, are the 'doubtfuls'. Some you may want to use as examples, or to include in the appendices. But some of these also you'll reject.

Lastly, arrange the points in a final, logical sequence, so as to meet your objective. Some people write them out on scraps of paper at this stage, and shift them around until they get the order right.

A plan like this will show you what information you'll need for the *body of the report*, and what should go in the *appendices*. Once written, you draw out your *conclusions* and

add your *recommendations*. And last of all, you add your *title page, summary, contents list, and introduction*. These eight items make up the conventional structure of a report, dealt with in more detail below.

3 Rules and guidelines

The following rules and guidelines relate to the conventional structure of a report. Some organizations lay down their own ('House style').

a) Title page

This normally carries the title, sub-title if any, date, author's name and position, and distribution list. It may also carry a reference number or other classification (eg, confidential). But don't overcrowd the page: a clear, simple layout is always the best.

b) Summary

A necessity if the report is a long one. It gives busy people the gist of the report without their having to read it all; but if attractively written, it may whet their appetite, and stimulate them to read the whole thing.

c) Contents list

The contents of short reports may be shown on the title page - or not at all. More extensive ones should always have a separate page, listing the major sections or chapters, sub-sections if any, and appendices, and giving their page numbers. It should be laid out clearly so as to show the relationship between them.

d) Introduction

This gives the background to the report, and shows why it was necessary. It usually states the objective of the report (in formal terms), who called for it, and the scope and treatment. The shorter it is, the better.

e) Body of the report

This contains your detailed facts and findings, shows how they were arrived at, and indicates the inferences to be drawn from them, all in accordance with your horizontal plan (p.5).

f) Conclusions

Here you draw out the main points of your report and present a considered judgment on them.

g) Recommendations

Finally, set down any recommendations, relating them clearly to what has gone before. In a good report, the reader is carried along by the argument, so that by the time he reaches the end, he'll need no further convincing.

h) Appendices

Some reports need detailed supporting information, or perhaps information that only *some* readers need. All this goes in the appendices.

In some cases you may also need to include:

j) Bibliography and/or References

This lists either the books and articles consulted as a basis for the report, or those you want to suggest as further reading - or both. Make clear which they are.

k) Glossary or Nomenclature

This can be a help if your readers include non-experts as well as experts. When writing on a specialist subject for non-experts alone, define any technical terms as you go along.

Style and presentation

Having dealt with the four essential stages in planning our report, we can now look at the two essential aspects of *writing* it.

1 Style

This is how you write - how any individual writes, so as to convey your thoughts to other people. But problems may arise, especially if you try to evaluate each word or sentence as you write it. 'That's silly,' you say, or, 'That won't work,' and you end up by blocking the natural expression of your ideas.

To overcome these problems:

a) Write the first draft to yourself. just as it comes. Don't evaluate what you are writing: simply break the spell of that blank, white sheet of paper.

b) Then edit your draft, reading it through the eyes of your reader. In particular:

Clear up any clichés and obvious ambiguities, eg, '. . . the flooding was caused by the liquidation of the contractors working on the sewage system.'

Substitute short, simple words where appropriate, eg, 'start' for 'commencement', and 'end' for 'termination'.

Choose words familiar to your reader. Technical terms are a useful shorthand to use with fellow specialists, but simply cloud the issue for anyone else.

Use active, rather than passive verbs, eg, 'The Board has approved this project,' rather than 'Approval has been given by the Board for this project.' *This is a contentious issue – most scientific reports tend to be written using the passive form. Ask about the 'House Style' if in doubt.*

Follow these rules, and your problems will diminish. In fact, choose the right words, and you'll find that they have a happy knack of arranging themselves.

2 Presentation

You may need to use tables, graphs, bar charts, or other diagrams. This is a subject in itself, so ask your local librarian for some helpful books. (The standard work, but expensive, is *Diagrams*, by A. Lockwood, published by Studio Vista.)

Also, remember the old journalistic principle: solid blocks of type weary the eye. Set your report out generously. Use wide margins; space out paragraphs; and indent sub-headings. It will make all the difference.

Helpful books

General reference material

Get to know your local reference library and the librarians in charge. They are used to handling every type of enquiry, and will help you to draw on a wealth of immediately available reference material, in the shape of encyclopedias, dictionaries, directories, handbooks, year-books, statistical returns, abstracts, etc. They are also able to draw on the help of other, specialist, libraries and information services, many of which are not known to the general public.

Books on report writing

For anyone wanting to know more about the actual job of report writing, we recommend the following:

1. *How to write reports* John Mitchell. (Fontana/Collins)
2. *Report writing* A. E. Derbyshire. (Edward Arnold)
3. *Writing technical reports* Bruce M. Cooper. (Pelican)
4. *The technique of clear writing* Robert Gunning. (McGraw-Hill)

A writer's friends

There are also a number of books which should be by your side whenever you write a report. We have limited the list below to those in paperback or inexpensive hardback editions:

1. *Chambers Twentieth Century Dictionary* or
2. *The Concise Oxford Dictionary* (or ideally both)
3. *Roget's Thesaurus of English Words and Phrases* (Longmans)
4. *Authors' and Printers' Dictionary* F. Howard Collins. (OUP)
5. *The Complete Plain Words* Sir Ernest Gowers. (Penguin)
6. *Fowler's Modern English Usage* (OUP)
7. *Usage and Abusage - a guide to good English* Eric Partridge. (Penguin)

First draft of a horizontal plan

A simplified example showing the breakdown of a subject into sections and each section into points

