Notes on report writing

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Summary *These notes set out briefly some principles and priorities for writing reports. They are written in report format as an example. They will not substitute for a book or a course on report writing, or for guidelines provided by a particular organisation to suit its own needs, for example, notes on the presentation of dissertations or theses which are provided by universities. The structure recommended emphasises the provision of a summary and a conclusion, with key sentences at prominent points in the report. The text should be concise and clear, and its construction should be guided by consideration of the reader, and a concern for accuracy and truth.*

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1. Preface

1.1 Copyleft notice

The web page version of this document was generated using the Perl script sparse.pl together with some free tools.

1.2 Acknowledgements

Original text modified by John D Lamb.

2. Purpose

The purpose of this report is to provide guidance on how to write reports. When writing a report, particular attention should be paid to the needs of the reader and the purpose: for whom and for what the report is intended.

Reports can be a tiresome chore for the writer, and often therefore also for the reader, or they can be an opportunity, in much the same way as many writers advocate that management ‘problems%rsquo; should be seen as opportunities. A report is an opportunity for the writer to communicate, not just to put words on paper, and for the reader to become better informed, rather than merely reading the words.

Three kinds of report are of interest:

1. short reports required as part of a student assignment
2. dissertations (see also Writing a dissertation with Microsoft Word)
3. reports for use inside your organisation, or to go outside on its behalf

2.1 Assignments

The purpose of the work involved in preparing an assignment answer is to extend your study of course material, and to get good marks and useful feedback from your tutor. This requires a report which displays to your tutor the knowledge you have gained from a course and, if appropriate, the ability to apply it. The purposes of the report are defined by what is of value to the writer (marks, extension of knowledge, feedback) and to the person who set the assignment. This latter will normally be indicated in the topic and its wording.

2.2 Dissertations

The purpose of a dissertation is to carry out an investigation of a managerial issue. Preferably, this will be a problem-solving exercise for a client, but it need not be. The report needs careful consideration because different audiences have different needs, and they may not be compatible.

For the academic assessor, the purpose of the report is similar to that of an assignment. The difference, however, is that the writer defines the topic and purpose of the investigation. Hence the reader%rsquo;s understanding of the topic, the issues, and the purpose of the investigation cannot be assumed. Fundamentally, however, the purpose of the report remains the same: to display knowledge and ability to apply it, in order for the writer to gain marks.

For the client, the purpose of the report is completely different. It is to provide solutions to problems (or means of taking advantage of opportunities!), or to suggest areas for development or further investigation. As with an organisation report, the purpose is to provide a benefit for the client.

2.3 Organisation reports

The prime purpose of a report in an organisation is to serve the needs of the recipient. Meeting these needs may result in direct benefit to the writer, if the topic is one in which she or he has a direct client interest, such as a report intended to persuade someone else to provide funds for some purpose. However, in general, whilst preparing the report will help to clarify the issue being tackled, the benefit to the writer comes mainly indirectly, if the report is found to be valuable to its users.

3. Method

Despite the different purposes referred to above, common questions can be used in the preparation of any report, and they form a good basis for a methodology of report writing:

1. What has the future reader asked to be told about?
2. What is the situation in which the report is set?
3. What is the starting point for the investigation behind the report, and for any changes argued in the report?
4. How will the report be judged? Will the reader be looking for general ideas for future investigation, clear avenues for development, or cut and dried, fully costed plans?
5. How can the information needed for the report be found and worked on? Analysis should yield answers that can be set alongside each other and against external data, for comparison and selection of the best options.
6. How do I ensure a favourable reception?
7. How much time do I have for the preparation of the report, and what is the word length the reader will accept?
8. How do I know that I am correct?

Notice that the questions could well prompt a preliminary report and discussion which then lead to a better main investigation and final report. Certainly, several of them may well send the investigator back to those who asked for the report, to seek clarification.

4. Structure

A strong structure is vital. Structure is not a boring chore; it is a feature that gives shape to the report. A clear structure helps the writer to set out the work behind the report. It gives the reader confidence in what has been done and said, because a logically structured report cannot hide an investigation that itself lacks order. Finally, a strong structure leads the reader easily through the significant stages of the report.

The number of elements in the structure will depend on the length of the report, but structure should be based on the following: ‘State what you are going to say; say it; say you have said it; stop.%rsquo;

4.1 Title and heading

Below the title there should generally be a subheading showing where the report comes from, rather like the writer%rsquo;s address at the top of a letter. The report should also be dated and give the author’s name, normally under the title, but they can come at the end in a short report. For assignment purposes, this subheading should give your name, email address, and seminar group.

4.2 Summary

Opinions and practice vary about where to give the summary. In academic papers the summary is often provided as an abstract immediately after the title. In management reports it is often provided as a separate executive summary. In dissertations the report often starts with a very brief introduction, followed by the purpose (see 4.3 below), and then the summary. Wherever it is placed, a busy reader will read this first and may read no further so the summary should state the contents and the conclusions of the report briefly and firmly. The summary has to attract, hold and inform the busy reader; it prepares the ground for a more detailed study of the report by those who have the need and the time to read further. It is one of the opportunities you have to make your points; it must be concise, but complete in the right particulars. Imagine you are trying to capture the attention of the Managing Director/Chief Executive (or your tutor!) on his or her way out of the building.

4.3 Purpose

After the summary, or as the opening section if you present your summary separately, there should be an explanation of the purpose of the report and the background to it. These sections set out your understanding of the points in the first three questions in Section 3 above.

4.4 Main body

Reports vary in content and purpose. Because of this, general titles for sections in the main body cannot be given; they will be specific to the report. Section titles should lead the reader through the report, and point their attention to sections they are particularly interested in, or should pay close attention to.

Besides words, your report may well need tables, graphs, pictures, plans, printouts etc. Always provide titles for these, and number them. In a long report, relegating them to the end of the document in an appendix usually helps the reader to follow the main lines of argument. It stops them being turned off by clutter. However, if you put them at the end they are easily ignored or taken out of context; so it may be a bad move if it discourages the reader from consulting them and seeing them as part of the argument. The accepted wisdom is that where they are directly pertinent to the subject under discussion they should be included in the main text; supplementary or supporting material should be put into an appendix.

If you have a lot of statistical data, a computer program or similar material, you can put it on a floppy disk or even a compact disk and attach it to the back of the report with plastic wallet designed for the purpose

Make sure if you include appendix material that it is referred to in the main body. If no reference is made to it

your reader is likely to assume it has no importance, to question why it is there at all, and may well not read it at all.

4.5 Conclusions

Reports do not always require recommendations and so the last section of many reports will be the conclusions. These will already have been outlined in the summary, and should have emerged clearly in the main body of the report, because the analysis given there is what led to them. The repetition is useful because it emphasises the final result of the work, pulls all the parts of the main body together and presents it as whole.

4.6 Recommendation

Where appropriate, any recommendations should be pulled together and restated at the end. Note that this is a restatement. No recommendations should be given at the end unless a case for them has been made in the main body of the report.

4.7 References

If you have referred to texts or other material, a full list should be provided after the references. Note that this should contain only those texts and other documents which have been consulted and used in some way in the preparation of the report. Enough detail should be given to enable interested readers to obtain the source material for themselves. There are several ways of giving references; the author should use the one preferred by the person who asked for the report. References are normally more extensive in academic reports than in those typically required by organisations. Within Canterbury Business School, the normally preferred way of giving academic references is the Harvard method. In brief, in the main text where you refer to other material you should give the author name(s) followed by the date of publication in brackets, together with the page number if you are using a direct quotation, e.g. Smith (1998 p.7). Then provide full details of the references in an alphabetically ordered list at the end. **Do not use footnotes or give the full reference details in the main text of the report.** Do note the University's rules on plagiarism, and never present material drawn from published texts (or other students!) as your own. Always acknowledge your source(s) of information, concepts and arguments.

4.8 Appendices

At the end of the report put any appendices. These should only contain matters of detail which are side issues, or other matters which fit badly into the mainstream text. Typical appendix material would be a questionnaire which has been used to collect data. Relevant information drawn from the responses would, of course, appear in the main body of the report.

5. The writing process

An old adage applies here: 'Write a little, read a little, think a lot'. Then go over it until it all hangs together.

Whilst word processing can ease the physical process of putting together the report and tidying up the presentation, it is only just beginning to be helpful with the actual composition of the report—even then, it will only check what you have written; it won't write it for you. Useful aids are as follows:

- word meanings and spellings: use a good dictionary small enough to be handy on the desk e.g. Pocket Oxford Dictionary (Soanes, 2001);
- ideas for the right word or useful variants: Roget's Thesaurus (Kirkpatrick, 2000) or the one in your word processing package, if you have one;
- using the right word in the right way: Fowler's Modern English Usage (Fowler and Burchfield, 1998);
- punctuation, sentence construction etc.: use a decent grammar text e.g. Mind the Stop (Carey 1971);
- choosing the right expressions: The Complete Plain Words (Gowers, 1987);

- data handling and its presentation: Facts from Figures, also A Primer in Data Reduction;
- writing in a style for easy reading and comprehension: Writing Technical Reports;
- for technological assistance: the spell and grammar checker on your word processing package.

Be careful with your choice of words:

- do not use slang and jargon;
- never use a long word where a short one will do;
- if it is possible to cut out a word, always do so;
- make sure that nothing you have written offends good practice towards different sexes and minority groups.

6. Presentation

Presentation is about the appearance of the report and includes the colour and type of paper, types of headings, use of 'white space' (i.e. blank lines, margins etc.). Sometimes this will be a matter of organisational style; sometimes it is a matter of personal choice. For assignments, presentation is very much up to you, but note the following:

- it is helpful to differentiate headings, subheadings etc. by using bold, underlined or italic fonts, or different sized fonts. Which type you use is not important, but be consistent. You may find the document Writing a dissertation with Microsoft Word helpful.
- remember that tutors may well wish to make comments on the document itself. Help them by leaving adequate white space. Also, do not make it difficult for them by putting each sheet into a plastic folder.
- wordprocessed material is much easier to read than handwriting, but
- hand-produced diagrams are perfectly acceptable.

7. Final test

Finally, check your report. How do you know it is good one, or even adequate? Use some simple tests. First, compare it with the brief you started with. Does it correspond? Leave it for a day or two and re-read it. You will almost certainly notice things that need changing if you come back to it after a break. Maybe your first thoughts were correct, but were they expressed well?

Getting someone else to read the report is not always as helpful as you might expect, unless they are willing and able to make relevant and constructive criticism. However, they will be able to tell you if what you have written is comprehensible. On the whole, though, you are on your own at this stage. One thing which can show up flaws is to read the draft out loud to yourself. Some people can't bear to do this, but it does show up misleading sentence construction and missing punctuation.

Check that the most important ideas are presented at the most advantageous places. The first words of a sentence get greatest prominence in the mind of the reader, and the first sentence of any paragraph should encapsulate the subject of the paragraph. The last sentence of a paragraph is a good place for a summary of what the paragraph has arrived at.

Look for any weakness, or lack of support for what you say. If it is a critical point, do something about it. If it is a side issue, consider dumping it. If a reader can demolish one argument, even in a peripheral issue, they will get the bit between their or her teeth and descend savagely on the remainder. Remember that your report may be read by enemies as well as friends. Be careful about using tricks like leaving an opposing argument that you intend to refute later, or a weak point that you mend later, or that you intend to deal with in a verbal discussion. Your reader may never get to the later point, or you may not be called to a meeting where you can discuss it.

Always be aware of your future readers, and sensitive and realistic about how they will react.

8. List of references

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