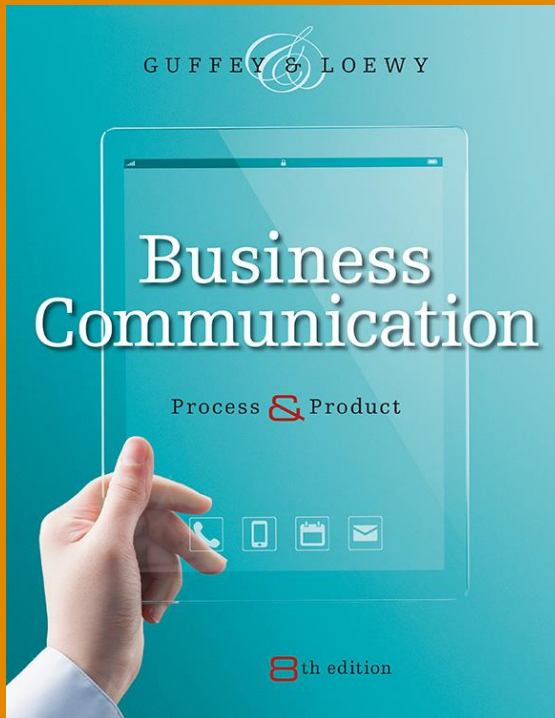


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Informal Business Reports



Business Communication: Process and Product, 8e

Mary Ellen Guffey and Dana Loewy

Instructor PowerPoint Library, 8e



Learning Objective 1

Analyze, sort, and interpret statistical data and other information using tables, measures of central tendency (mean, median, and mode) and decision matrices.

Topics in This Chapter



**Interpreting
report data**



**Drawing
conclusions**



**Making
recommendations**



**Organizing
report
information**



**Providing
reader cues**



**Writing
informal
reports**

Interpreting Digital-Age Data



1

Collecting information is nearly effortless today.

2

Making sense of massive amounts of data is a lot harder.

3

Unprocessed data become meaningful through skillful sorting, analysis, combination, and recombination.

Tabulating and Analyzing Data



Table

Systematic columns and rows

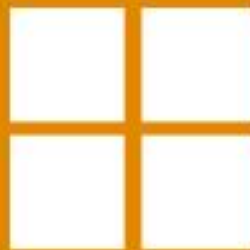
m

The **mean** (arithmetic average), **median** (middle point in a range of values), and **mode** (most frequent value)



Correlation

Relationships between variables



Grid

Boxes of rows and columns to sort data



Decision matrix

Grid that allows comparison among weighted criteria

Mean, Median, Mode



The Athletic Department is collecting data on shoe sizes for male and female players. Here are the shoe sizes for 20 people:



What is the mean?

What is the median?

What is the mode?

How can such statistical values be important to report writers?

Mean, Median, Mode

Answers:

Mean (average
value)=

10

Median (middle
point in range
values)=

11

Mode (most
frequent
value)=

12



Coincidence or Correlation?



1

When researchers tabulate and analyze data, relationships among two or more variables may emerge that help explain the findings.

2

Proceed with caution: Are the variables truly related? Does a causal relationship exist? Apparent correlations can stimulate investigation and present possible solutions.



Learning Objective 2

Draw meaningful conclusions and make practical report recommendations after sound and valid analysis.

Drawing Report Conclusions

01

Interpret and summarize the findings.

Tell what your findings (collected data) mean.

02

Relate the conclusions to the report problem.

Focus only on conclusions that help solve the original problem.

Drawing Report Conclusions

03

Limit the conclusions to the data presented.

Do not introduce new material.

04

Be objective.

Avoid exaggerating or manipulating the data to prove a point.

Drawing Report Conclusions

05

Use consistent criteria.

In evaluating options, use the same criteria for each alternative.

06

Enumerate each conclusion.

Number and list each item. Present each conclusion in parallel form.

Making Report Recommendations

01

Suggest actions.

What specific procedures can help solve the report problem?

02

Focus on recommendations that are practical and agreeable.

Suggest feasible actions that would be acceptable to this audience.

Making Report Recommendations

03

Present recommendations separately.

Enumerate each in a statement beginning with a verb. For example:

Invest half of the income in growth funds.

04

Describe how to implement the recommendations, if requested.

Some writers present detailed plans for executing the recommendations.

Report Conclusions and Recommendations

Conclusion

The raw materials used in smartphones often come from war-torn countries and are extracted under dangerous conditions, often by children.

Recommendation

Create a fair-trade smartphone that is not manufactured from polluting “conflict metals” mined by children.



Learning Objective 3

Organize report data logically and provide reader cues to aid comprehension.

Organizing Report Information

Time



Arrange data by chronology, e.g. 2014, 2015, 2016.

Component



Arrange data by classification such as location, geography, division, product, or part.

Importance



Order data from most important to least important or vice versa.

Organizing Report Information

Criteria



Arrange data by evaluative categories.

In a report comparing tablet computers, organize by price, warranty, size, screen resolution, and more.

Convention



Organize data according to prescribed categories.

Proposals, for example, are organized by staff, budget, schedule, and so forth.

Structural Cues for Reports

Introductions

Discuss purpose and significance of report.

Preview main points and order of development.

Transitions

however

on the contrary

therefore

moreover

Structural Cues for Reports

Headings

01

Write short but clear headings.

02

Experiment with wording that tells who, what, when, where, why, and how.

03

Include at least one heading per report page.

Structural Cues for Reports

Headings

04

Try to create headings that are parallel. For example:

- *Creating Team Motivation*
- *Treating Employees Like Customers (NOT Employees Should Be Treated Like Customers)*

05

Integrate headings gracefully. Do not repeat the heading in the following sentence.

Avoid using the heading as antecedent to a pronoun. For example, avoid:

- **CUSTOMER SURVEYS**
These are...

Levels of Report Headings

REPORT, CHAPTER, AND PART TITLES

The title of a report, chapter heading, or major part should be centered in all caps.

First-Level Subheading

Headings indicating the first level of division are centered and bolded. Whether a report is single-spaced or double-spaced, most writers triple-space (leaving two blank lines) before and double-space (leaving one blank line) after a first-level heading.

Second-Level Subheading

Headings that divide topics introduced by first-level subheadings are bolded and begin at the left margin. For that reason, a second-level subheading is also called a side heading.

Third-level subheading. Because it is part of the paragraph that follows, a third-level subheading is also called a paragraph subheading. It should appear in boldface print.

Types of Headings

Functional Headings

Executive Summary

Introduction

Findings

Discussion

Talking Headings

The Best Business Laptop Money Can Buy

Tablet Computers Displace Notebooks

Texting: The New Smoking Gun

What's New in Social Media?

Types of Headings

Combination Headings

Background: How Apple Won

Personnel: The Savvy Workforce

Production Costs: The Investment
Is Paying Off



Learning Objective 4

Write short informational reports that describe routine tasks.

Summaries

Summary



- ☐ compress the main points from a book, report, article, website, meeting or trip
- ☐ present an accurate condensed version of a report at only 5-15 percent of its length
- ☐ save time

Summaries

In writing a summary, follow these general guidelines:

Present the purpose of the document being summarized. Why was it written?

Highlight the research methods (if appropriate), findings, conclusions, and recommendations.

Omit illustrations, examples, and references.

Summaries

In writing a summary, follow these general guidelines:

Organize for readability by including headings and bulleted or numbered lists.

Include your reactions or an overall evaluation of the document if asked to do so.

Informational Report Content

Introduction

- ☐ Identify the report and its purpose.
- ☐ Present a brief overview of the report's organization, especially for longer reports.
- ☐ Provide brief background information when readers are unfamiliar with the topic.

Informational Report Content

Report Body

- ☐ Group facts or findings into three to five roughly equal, discrete segments.
- ☐ Organize by time, component, importance, criteria, convention, or some other method.
- ☐ Supply functional or talking heads (at least one per page) to describe each section.

Informational Report Content

Report Body

- ☐ Use an informal, conversational writing style unless the audience expects a formal tone.
- ☐ Use bullets, numbered and lettered lists, headings, underlined items, and white space to enhance readability.

Informational Report Content

Summary/ Conclusion

- ☐ When necessary, briefly review the main points and discuss what action will follow.
- ☐ If relevant, express appreciation to describe your willingness to provide further information.

Typical Informational Reports

Periodic (activity) reports



Describe production, sales, shipping, service, and other recurring activities.

Trip, convention, conference reports



Describe an event, summarize three to five main points of interest, itemize expenses, and analyze the event's value.

Typical Informational Reports

Progress and interim reports



Explain continuing progress including work completed, work in progress, future activities, and completion date.

Investigative reports



Examine problems and supply facts; provide little analysis.

Prepare short analytical reports that solve business problems.

Analytical Reports

Analytical reports collect and present data but also do the following:

Evaluate the data

Try to persuade the reader to accept the conclusions and act on the recommendations

Emphasize reasoning and conclusions

Analytical Report Content

Introduction

- ☐ Explain why the report was written. For research studies, include the significance, scope, limitations, and methodology of the investigation.
- ☐ Preview the report's organization.
- ☐ Summarize the conclusions and recommendations for receptive audiences.

Analytical Report Content

Report Body

- ☐ Discuss the pros and cons of each alternative. For receptive audiences, consider placing the recommended alternative last.
- ☐ Establish criteria to evaluate alternatives. In “yardstick” studies, create criteria to use in measuring each alternative consistently.

Analytical Report Content

Report Body

- ☐ Support the findings with evidence: facts, statistics, expert opinions, survey data, and other proof.
- ☐ Use headings, enumeration, lists, tables, and graphics to focus emphasis.

Analytical Report Content

Conclusions/ Recommendations

- ☐ Develop reasonable conclusions that answer the research question. Justify the conclusions with highlights from the findings.
- ☐ Make recommendations, if asked. Use action verbs. Explain recommendations that need explaining.

Typical Short Analytical Reports

Justification/ recommendation reports



Make recommendations to management; provide data to solve problems and make decisions.

Feasibility reports



Analyze problems and predict whether alternatives will be practical or advisable.

Typical Short Analytical Reports

Yardstick reports



Establish criteria and evaluate alternatives by measuring against the “yardstick” criteria.

Student Progress Report

DATE: January 2, 2015
TO: Cheryl Bryant, Director
OAS Recycling Program
FROM: Alan Christopher *AC*
OAS Business Senator
SUBJECT: Progress of Recycling Study at South Bay College

This report describes the progress of my project with OAS to study the Sun Coast University recycling program and to recommend ways to increase participation.

Background

Although results from the campus recycling program are satisfactory, OAS feels the participation could increase. As a result, OAS asked me to lead a campaign to learn more about campus attitudes toward recycling

Student Progress Reports

Ms. Cheryl Bryant

Page 2

January 2, 2015

and to suggest ways to improve the program. I agreed to collect secondary data by reading periodicals about recycling efforts in other parts of the country. More importantly, I agreed to collect primary data by conducting a campus survey.

Work Completed

To date, I have completed the secondary research, which included using the library and databases to find current articles about recycling programs in other areas. Several references had particularly relevant data that will be useful for this report. To collect data from the campus population, my business communication class and I developed a pilot questionnaire. We tried it out on 28 people and then revised it. Then we administered our revised questionnaire to a random sample of 220 individuals.

Student Progress Reports

Ms. Cheryl Bryant

Page 3

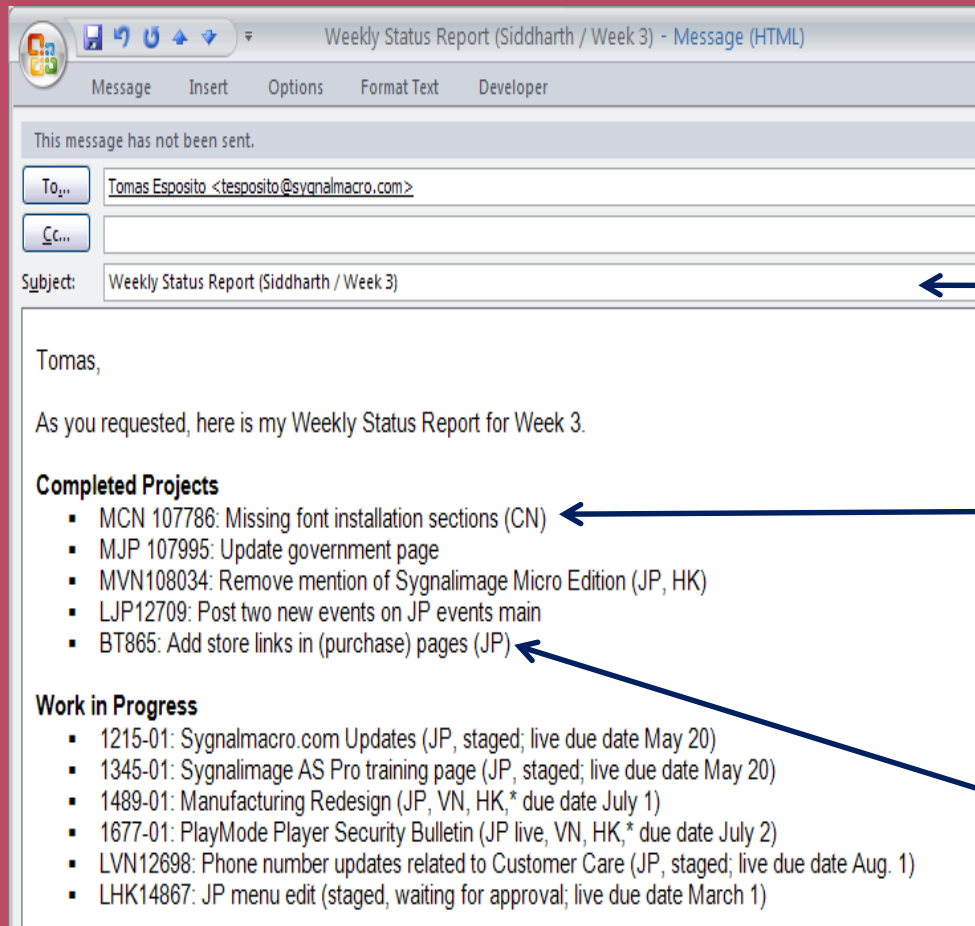
January 2, 2015

Work to Be Completed

The questionnaire data must now be tabulated. I plan to work with a committee of three other students in counting questionnaire responses. After making tables and analyzing the data, I will discuss the findings with the class. We will draw conclusions from the findings

and discuss ways to improve participation in the recycling program. A group discussion is a good way to brainstorm for ideas to improve the program. Because I don't expect problems, I should be able to submit the final report to you by our January 18 deadline.

Periodic (Activity) Report – E-mail Format



Sends internal informational report by e-mail as required weekly by manager

Uses abbreviations for China (CN), Japan (JP), Hong Kong (HK), and so on, familiar to readers

Employs bulleted lists and abbreviated project descriptions for high “skim value”

Periodic (Activity) Report – E-mail Format

Work in Progress

- 1215-01: Sygnalmacro.com Updates (JP, staged; live due date May 20)
- 1345-01: Sygnalimage AS Pro training page (JP, staged; live due date May 20)
- 1489-01: Manufacturing Redesign (JP, VN, HK,* due date July 1)
- 1677-01: PlayMode Player Security Bulletin (JP live, VN, HK,* due date July 2)
- LVN12698: Phone number updates related to Customer Care (JP, staged; live due date Aug. 1)
- LHK14867: JP menu edit (staged, waiting for approval; live due date March 1)

Includes internal project numbers to identify assignments

Ongoing Projects

- Broken links HK, JP external and internal

Clearly labels the tasks as completed, pending, and ongoing

Other Activities

- Worked with Andy Takamura and Sisi Lu on creating localized marketing badges for JP and SG
- Set up two registration forms for region on Wiley
- Continued to work on cdei script migration

Issues

- None

*Awaiting translations

Regards,

Siddharth

sm Siddharth Singh | Senior Web Producer | Sygnal Macro | 367 Edison Ave., Palo Alto, CA 94301 | +1 650.328.6800 | ssingh@sygnalmacro.com

Provides full contact information in prepared signature block



END