

Planning and Writing a Business Report

Good business writing takes time. Following the steps outlined below will ensure you answer the question and/or solve the problem your report was intended to address, and it will help ensure that your report is well received.

1. Analyze the problem and the purpose
2. Consider the audience
3. Prepare a work plan
4. Conduct research and document data
5. Organize and analyze the data
6. Write the first draft
7. Revise and proofread the report

1. Analyze the Problem and the Purpose

- Ask what the issue is and what caused the issue to arise
- Make a clear statement that identifies a question your report will answer or the problem your report will solve; use this focused statement to stay on track
- Consider whether the report is informative (a report of what happened) or analytical (a report that offers recommendations)

2. Consider the Audience

- Ask who the report is intended for and who else might read it
- Identify whether the report is for internal or external purposes
- Determine who the stakeholders are, who will make the decisions, and what decisions might be made
- Ascertain the level of knowledge of the readers; consider what your readers know and what they need to know

3. Prepare a Work Plan

- Determine what information you need to gather (preliminary work for this is done when determining the purpose of the report)
- Consider the problem, purpose, audience, resources needed, research strategy, and the report outline when preparing a schedule

4. Conduct Research and Document Data

- Collect primary sources of research to get data; include unpublished information such as surveys, interviews, experiments, questionnaires, personal observation, and organization files
- Gather secondary sources of research such as information published in books, business journals, magazines, newspapers, and government reports
- Establish your credibility and maintain your integrity by referencing all sources in your formal report on a Works Cited list and in the body of your report, if required

5. Organize and Analyze the Data

- Organize the information you need to solve the problem or answer the question as defined in the purpose of the report
- Answer the initial research question
- Identify gaps in information
- Draw reasonable and logical conclusions from the information
- Think about what action(s) should be taken
- Illustrate the data in easy to read formats such as tables and charts that suit your purpose and are understandable to your audience
- Analyze your data and use it to support your conclusions and recommendations

6. Write the First Draft

- Keep the problem/issue, the purpose of the report, your audience, and the type of report in mind as you begin to write
- Refer to your work plan and outline to stay on track
- Write clearly and professionally from the start; avoid the use of jargon and slang
- Use headings and sub-headings to organize the information and make your report easier to read
- Use transition words and phrases to help the reader see the relationships between your points
- Be objective-avoid the use of 'I' or 'We'

7. Revise and Proofread the Report

- Allow the first draft to 'sit' for a while before revising it
- Read the report aloud and revise for the 6 C's as follows:
 - Clarity – how clear the writing is
 - Coherence – how logical the writing is and how well the ideas fit together
 - Consistency – how the message is delivered and how the report is formatted
 - Conciseness – how the ideas are not lost in jargon or unnecessary words
 - Correctness – how accurate the information is and how well it is referenced
 - Completeness – how well the report's criteria are met and the points explained
- Proofread as many times as is necessary to ensure your report is accurate, error-free, and effective
- First, proofread for content and organization
- Second, check the grammar, spelling, and punctuation
- Finally, format the report; pay attention to page numbers, layout, spacing, referencing

References

Guffey, M. E. , & Almonte, R. (2008). *The practice of business communication* (1st Canadian ed.). Toronto: Nelson.

Guffey, M. E., Rhodes, K., & Rogin, P. (2010). *Business communication: Process and product* (3rd. brief Canadian ed.). Toronto: Nelson.