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Report Writing

Hazel Brauch

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By: Hazel Brauch
Monsanto Chemical Co.
St. Louis, Missouri

This discussion of report writing will attempt to cover the basic elements of general report writing and the trends that have occurred in the field within recent years. It will not attempt to get into the field of specialized report writing as exemplified by public accounting, educational accounting, small business and large corporation reports.

Definition of a Report

The definition of report writing says simply "A report is a fact channel." It merely carries the facts and, in this respect, differs from the letter which works for action. The report may form the basis for action, but of itself it does not seek action.

Basic Elements of a Report

To write a report, one of the basic elements is to have an understanding of the subject. Confer with the person for whom you are preparing the report. Have a definite understanding of its contents. Be sure to listen, not only with your ears, but most important, with your mind.

Then, determine the type of report you will prepare. It may be either a periodic report, monthly, quarterly, annually; or a progressive report, covering a period of time such as six months or a year. The purpose of both of these reports is to inform and they are generally prepared from records easily accessible.

Other types of reports are the investigation or research report; the recommendation report, which incidentally, is the only type of report where the person making the report may express an opinion. Ordinarily, the report should be objective. The other category of reports is the statistical report which is also prepared from records and information generally readily accessible.

The next step in writing a report is to map a campaign; in other words, outline. Many people dread the word "outline": yet it simply means organizing material in a logical sequence. For example, the report may have an introduction which gives the purpose and scope of the report plus the methods used to develop the material. It may then arrive at a conclusion to be used as a basis for action. These first two parts of the report may be used by the busy executive who does not wish to go further into the subject. Next, you may decide to put the body or technical part of the report which will probably be used only by technical people. Finally, you may want to put the appendix or bibliography which will be invaluable not only to the reader, but also to others who may later work on the report.

One of the basic steps in gathering material is to determine the sources of information which may be primary: from your own observation and interviews, from your own experimentation such as questionnaires, or the information may be secondary from documents, records or printed material. There are limitations on research because of time, accessibility of data, because of lack of experience of the researcher and one that often comes to the fore, money.

After you have the information, synthesize what is pertinent. Discard duplications, insignificant or unadaptable data. But above all, strive for unity of thought and purpose.

In writing a report, create a technique. Develop the report so that it can be easily and rapidly read. Use sub-titles, topic sentences, clear, crisp paragraphs and good English—English so good it will be understood, not misunderstood.

Be objective, be neat, attractive. Reflect good taste. And perhaps this may seem odd to you for a report, but be graceful. Say what you want to say as briefly as you can in the spirit in which you want to say it.

As far as the mechanics of report writing are concerned, remember that the liberal use of white space makes a better display. Your specifications generally will be the 8½ by 11″ report. Whether to single or double space the report will be determined by the taste of the person for whom the report is being prepared. Use properly such mechanical aids as captions, subcaptions, margin subheads, space, capitals, illustrations and color.

Know that the basic format of a good report usually consists of:

1. Title page—which is self-explanatory.
2. Letter of Transmittal—should indicate for whom the report is being prepared, the purpose and scope of the report and the length of time allotted to its preparation. Should also contain acknowledgments of help given.
3. Table of Contents—if report is more than four or five pages long.
4. Summary—may be used by busy people or if the report is of a highly technical nature, a synopsis that can be used by nontechnical people.
5. Text—should express the objective of the

report and the plan of procedure that was used. The text should also contain footnotes which serve three important purposes. They can be used by subsequent workers on the project thus eliminating duplication of effort. They may also be used for explanation and amplification purposes and will serve as a protection against plagiarism charges.

6. Appendix—may contain tables, charts, maps and other illustrative material.
7. Bibliography—listing the sources of information.

Informalizing the Report

Having considered the basic elements and format of a report, it is apparent that a report can be very stilted and unwieldy, leading to lack of interest on the reader's part. Therefore, one major trend has been to informalize the report.

Some of the methods that have been devised to informalize a report are:

Keep sentences short. No doubt, when you were in school, you had to read writers such as Thackeray, Scott and Dickens whom you remember as writing very long sentences. Yet, these authors have withstood the test of time due partly to the fact that they generally wrote short sentences, as has been proved by a reading survey organization.

Prefer the simple to the complex. Remember that simplicity is the outward sign of depth of thought. If someone expresses a thought on a difficult subject very concisely, you know he has given it much consideration.

Avoid unnecessary words. Einstein was able to project his theory to other men in spite of its complexity because he was able to find the words that they could understand. But another man, Willard Gibbs, who made many brilliant discoveries so obscured them in a mass of words that people did not know he had made these findings.

Another method of informalizing a report is to put action in your verbs and concreteness in your nouns. Prefer the familiar word. Do not say "sesquipedalian" when you mean a user of big words. To put it another way, be yourself.

Use terms your reader can picture. Don't say the "Triple A" building when you mean the employee's store, unless your reader knows what the "Triple A" building is. In other words, tie in with your reader's experience.

Make full use of variety, using among other things, pie charts, color, and originality in presentation. And finally, in informalizing your report, write simply *to express, not impress.*

Another Trend

A second major trend in report writing has been a shifting from the hard and fast rule that every good report should be presented on only one sheet of paper. This idea, which gained widespread circulation, was that anything worth saying could be said on one page of paper. But recently, there has come a realization that in one instance a hundred words on one sheet of paper may be much too long for the subject being discussed, while in another instance a paper covering fifteen hundred words is concise because of the nature of the subject involved, or because of the person for whom the paper is being written.

This trend can be expressed simply in the rule that you should remember the person for whom the report is being written. He may prefer the sharp, staccato of "Sales up 10%" while someone else may like the smooth, melodious "Sales are up from $300,000 in 1959 to $330,000 in 1960 or $30,000, a gain of 10%."

Good Report?

Since we now know some of the basic elements of report writing and the trends that have recently taken place in the field, perhaps we should discuss how you will know if you have done a good job.

Have you analyzed more profoundly than others the problem put before you? In other words, have you dug deeper? *Do you know it?*

Have you had an original focus of facts toward a desired purpose: i.e., have you used your creative ability?

If you are writing a recommendation report, have you suggested alternative courses of action of which you have thought out the foreseeable consequences?

Have you maintained your integrity, been objective, intellectually honest, fair and broadminded?

Have you used your imagination?

Have you answered all pertinent questions likely to arise?

But most important—does your report read as though a human being wrote it?

Footnote

Now perhaps you remember that we commented that one of the important advantages of a footnote is that it serves as a protection against charges of plagiarism. So right now, we would like to add a footnote that our sources of information for this paper were:

1. Royal Bank of Canada Monthly Letters
2. "Effective Communication in Business"
   Robert R. Aurner
3. "The Technique of Clear Writing"
   Robert Gunning
4. "Introduction to American Business"
   David J. Schwartz, Jr.
   Walter Kay Smart
5. "Business Letters"
   Louis William McKelvey