

# **Understanding and Planning Business Reports and Proposals**

# Reports and Proposals

**Guide  
Decisions**

**Comply with  
Government  
Regulations**

**Gain the  
Acceptance  
of Others**

**Monitor  
and Control  
Operations**

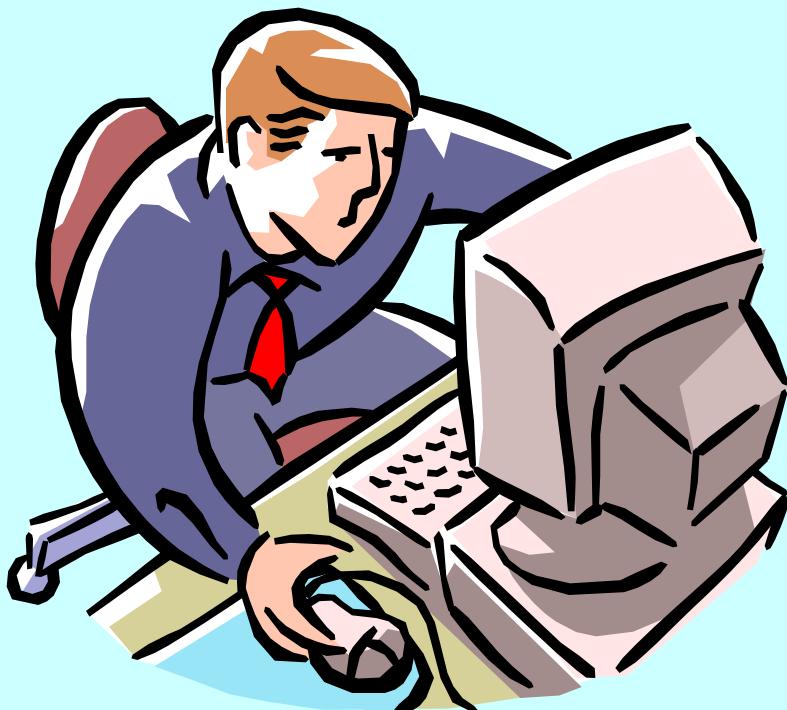
**Implement  
Policies and  
Procedures**

**Document  
Results**

# **Informational Reports**

- **Monitor and control operations**
- **Implement policies and procedures**
- **Comply with government regulations**
- **Document progress on projects**

# Analytical Reports



**Problem-Solving  
Reports**

**Business  
Proposals**

# Solving Problems

**Trouble Shooting Reports**

**Feasibility Reports**

**Justification Reports**

# Writing Proposals

**Internal**

**External**

**Solicited**

**Unsolicited**

# Three-Step Writing Process

## Planning

Analyze the Situation  
Investigate the Topic  
Adapt to Audience

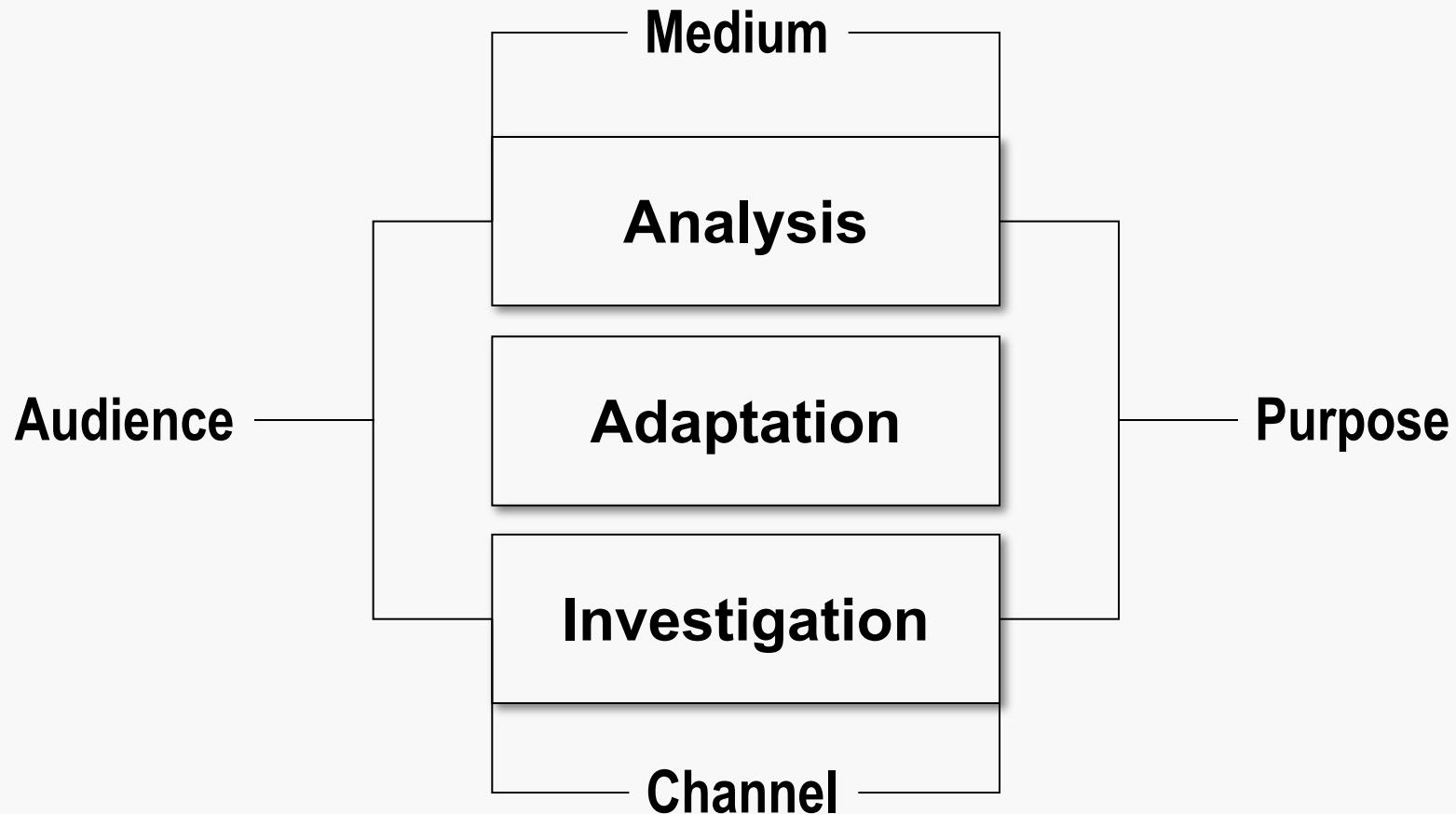
## Writing

Organize the Message  
Compose the  
Message

## Completing

Revise the Message  
Produce the Message  
Proofread the  
Message

# Planning Reports



# Analyzing the Situation

**Informational  
Reports**

**Analytical  
Reports**

# Defining the Problem

**Who?**

**What?**

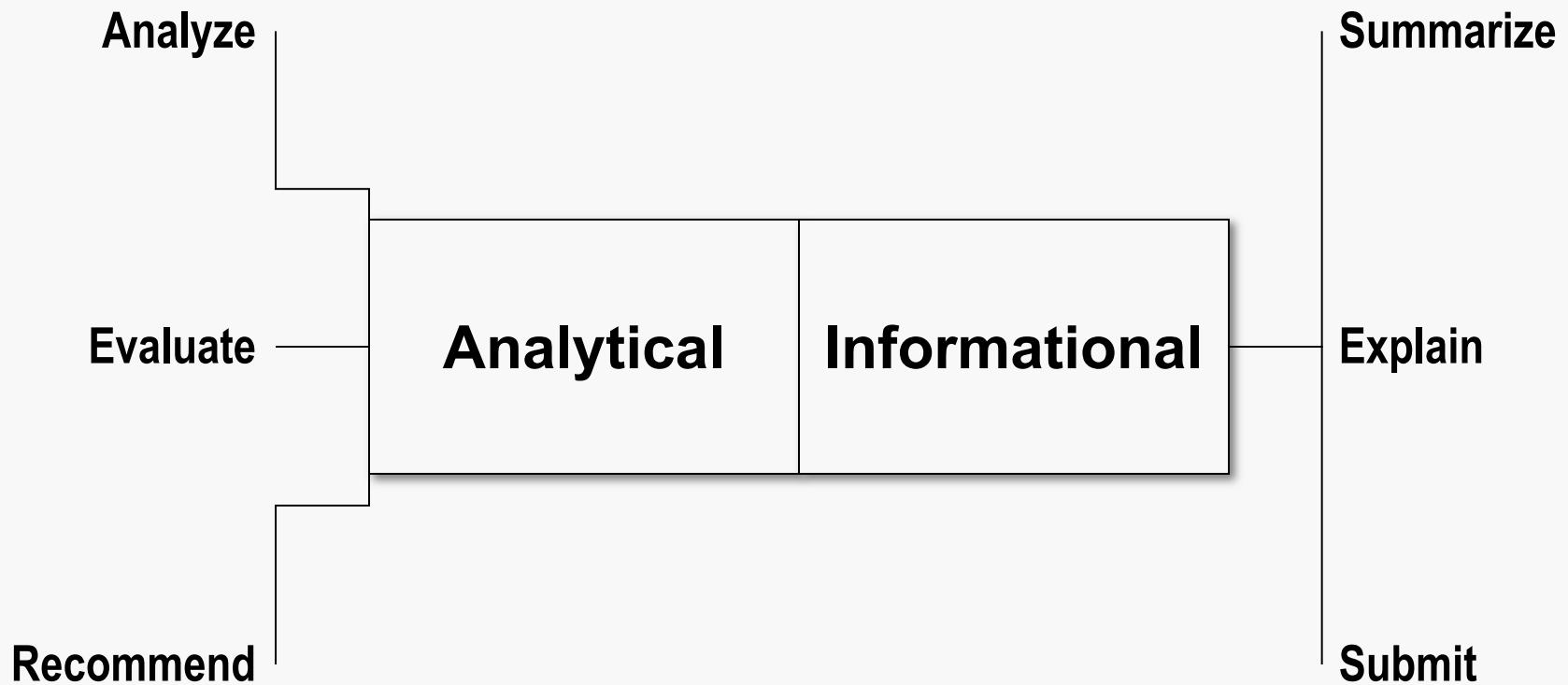
**Where?**

**When?**

**Why?**

**How?**

# Writing a Purpose Statement



# Drafting a Preliminary Outline

<b>Descriptive (Topical)</b>	<b>Informative (Talking)</b>
<ul style="list-style-type: none"><li>I. Industry Characteristics<ul style="list-style-type: none"><li>A. Annual Sales</li><li>B. Profitability</li><li>C. Growth Rate<ul style="list-style-type: none"><li>1. Sales</li><li>2. Profit</li></ul></li></ul></li></ul>	<ul style="list-style-type: none"><li>I. What is the nature of the industry?<ul style="list-style-type: none"><li>A. What are the annual sales?</li><li>B. Is the industry profitable?</li><li>C. What is the growth pattern?<ul style="list-style-type: none"><li>1. Sales growth?</li><li>2. Profit growth?</li></ul></li></ul></li></ul>

# **Preparing the Work Plan**

- **Statement of the problem**
- **Statement of the purpose and scope**
- **Discussion of tasks to be accomplished**
- **Description of final products or outcomes**
- **Review of schedules and requirements**
- **Plans for following up**
- **Working outline**

# **Finding Information in the Library**

<b>Business Books</b>	<b>Electronic Databases</b>	<b>Newspapers</b>	<b>Periodicals</b>
<b>Directories</b>	<b>Almanacs</b>	<b>Statistical Resource</b>	<b>Government Publications</b>

# **Business Information on the Internet**

**Internet  
Public Library**

**Company  
Websites**

**News  
Release Sites**



# **Searching Databases**

**Use Multiple Search Engines**

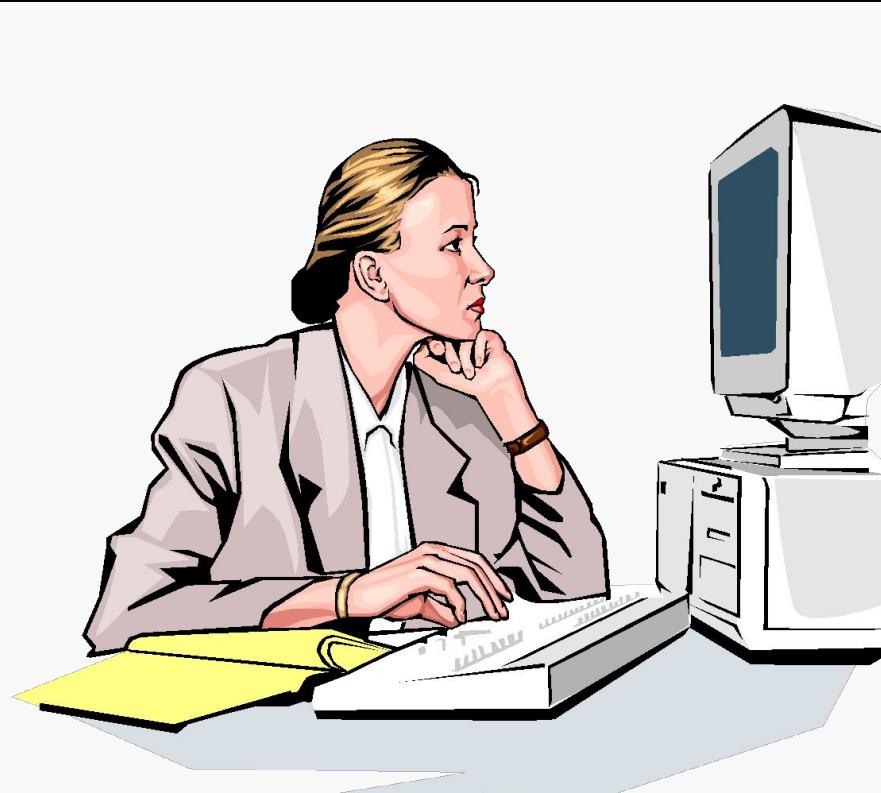
**Replace Concepts With Key Words**

**Use Variations of Search Terms**

**Specify Phrases and Key Words**

**Refine Searches As Needed**

# Sources of Primary Information



**Documents**

**Observations**

**Experiments**

# **Effective Surveys**

**Provide Clear  
Instructions**

**Use Short  
Questionnaires**

**Seek Easy-to-Analyze  
Answers**

**Avoid Leading  
Questions**

**Pretest  
Questionnaires**

**Ask One Thing  
At a Time**

# Effective Interviews

**Plan the Interview**

**Prepare Questions**

**Prioritize Questions**

**Don't Ask Too Many Questions**

**Edit the Questions**

**Process Information**

# Documenting Sources

**Copyrighted  
Material**

**General  
Knowledge**

# Interpret Your Findings

