

Writing and Completing Business Reports and Proposals



Three-Step Writing Process

Planning

Analyze the

Situation

Investigate the

Topic

Adapt to the

Audience

Writing

Organize the

Message

Compose the

Message

Completing

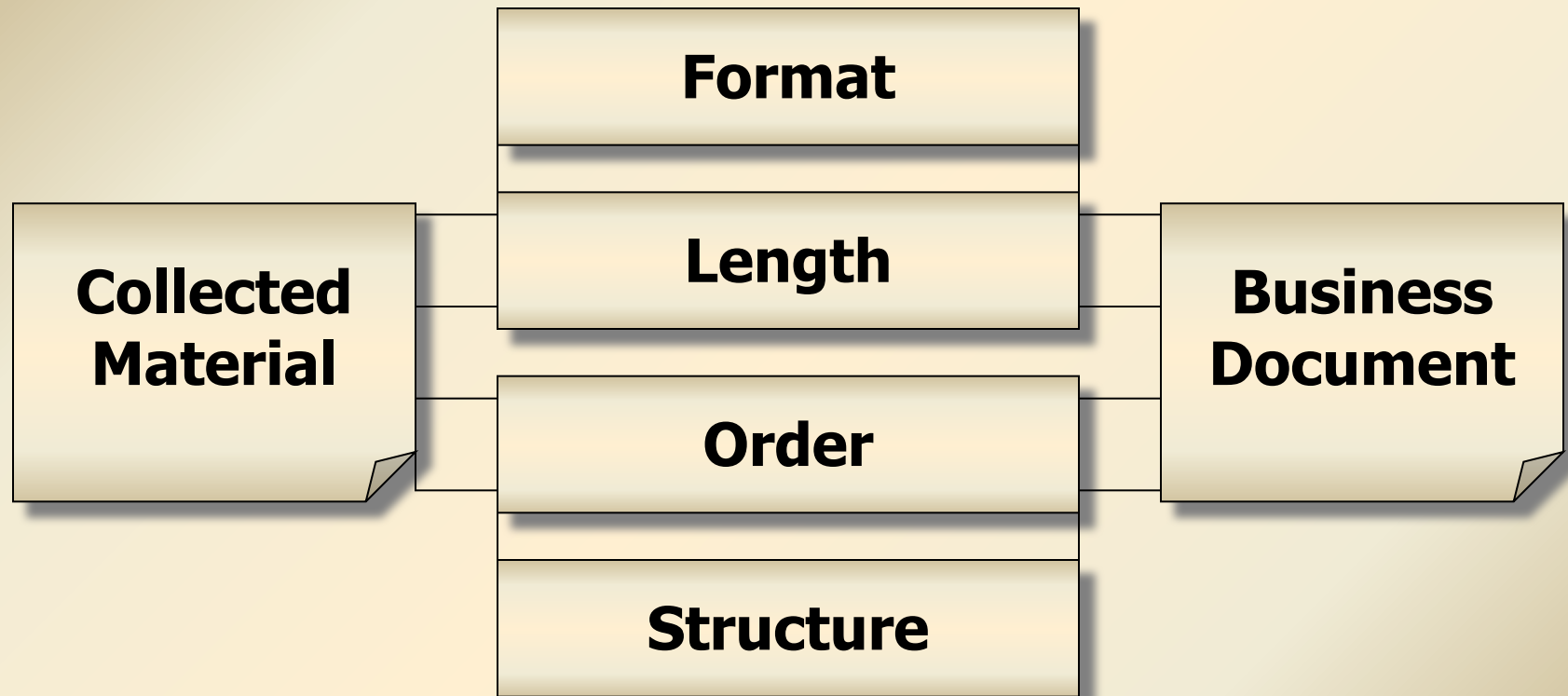
Revise the Message

Produce the Message

Proofread the

Message

Organizing Reports and Proposals



Selecting Format and Length

- **Preprinted Form**
- **Letter**
- **Memorandum**
- **Manuscript**



Choosing an Approach

Direct Approach

Indirect Approach

Receptive

Hostile

Open-Minded

Skeptical

Audience

Structuring Informational Reports

Importance

Sequence
(To describe
process)

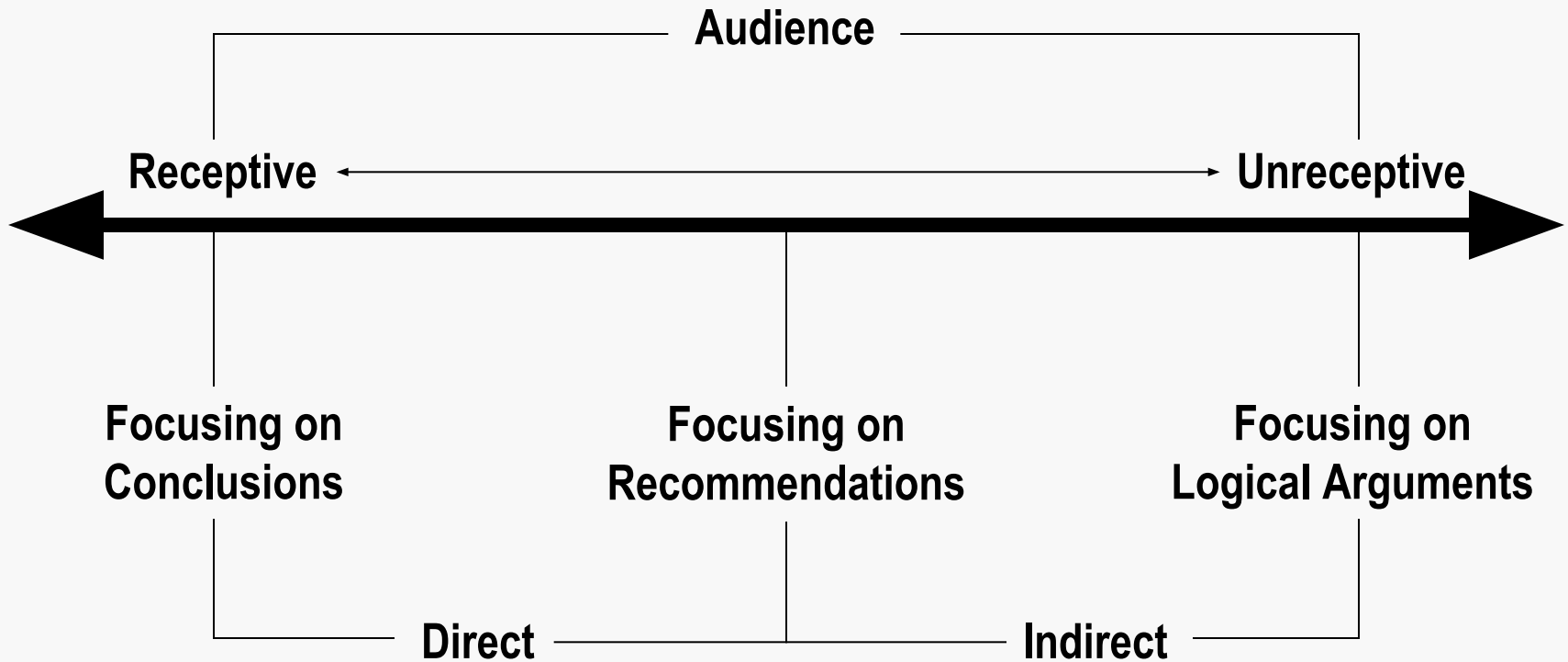
Chronology
(To describe
chain of events)

**Spatial
Orientation**
(To describe how
something works)

Geography

Category
(To review several
distinct
Aspects)

Structuring Analytical Reports



Structuring Proposals

Solicited

(Problem identified, they asked for proposal)

- **Receptive Audience**
- **Recognized Problem**
- **Identified Solution**

Unsolicited

(Audience don't know the problem, clarify first, then propose solution)

- **Skeptical Audience**
- **Unrecognized Problem**
- **Proposed Solution**

Selecting Visual Aids

Keep in mind that most visuals are not interchangeable. Some types of visuals depict certain kinds of data better than others:

- To present detailed, exact values, use tables.
- To illustrate trends over time, use a line chart or a bar chart.
- To show frequency or distribution, use a pie chart, segmented bar chart, or area chart.
- To compare one item with another, use a bar chart.
- To compare one part with the whole, use a pie chart.
- To show correlations, use a line chart, a bar chart, or a scatter (dot) chart.
- To show geographic relationships, use a map.
- To illustrate a process or a procedure, use a flowchart or a diagram.

The Parts of a Table

<i>Stub head</i>	<i>Multicolumn Head*</i>		<i>Single Column Head</i>	<i>Single Column Head</i>
	<i>Subhead</i>	<i>Subhead</i>		
Row head	XXX	XXX	XX	XX
Row head				
Subhead	XX	XXX	XX	XX
Subhead	XX	XXX	XX	XX
Total	XXX	XXX	XX	XX

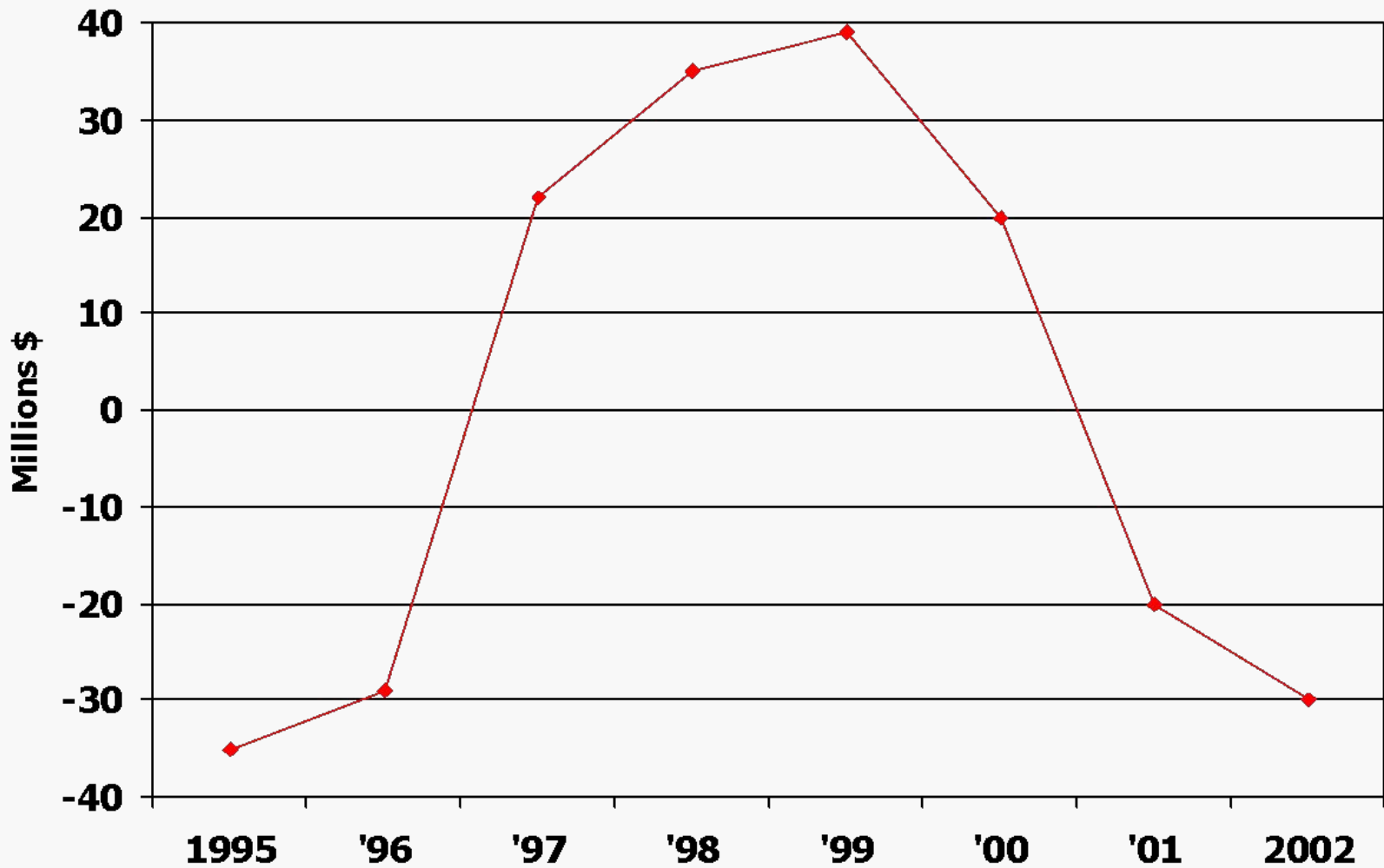
Source: (In the same format as a text footnote).

**Footnote (for explanation of elements in the table).*

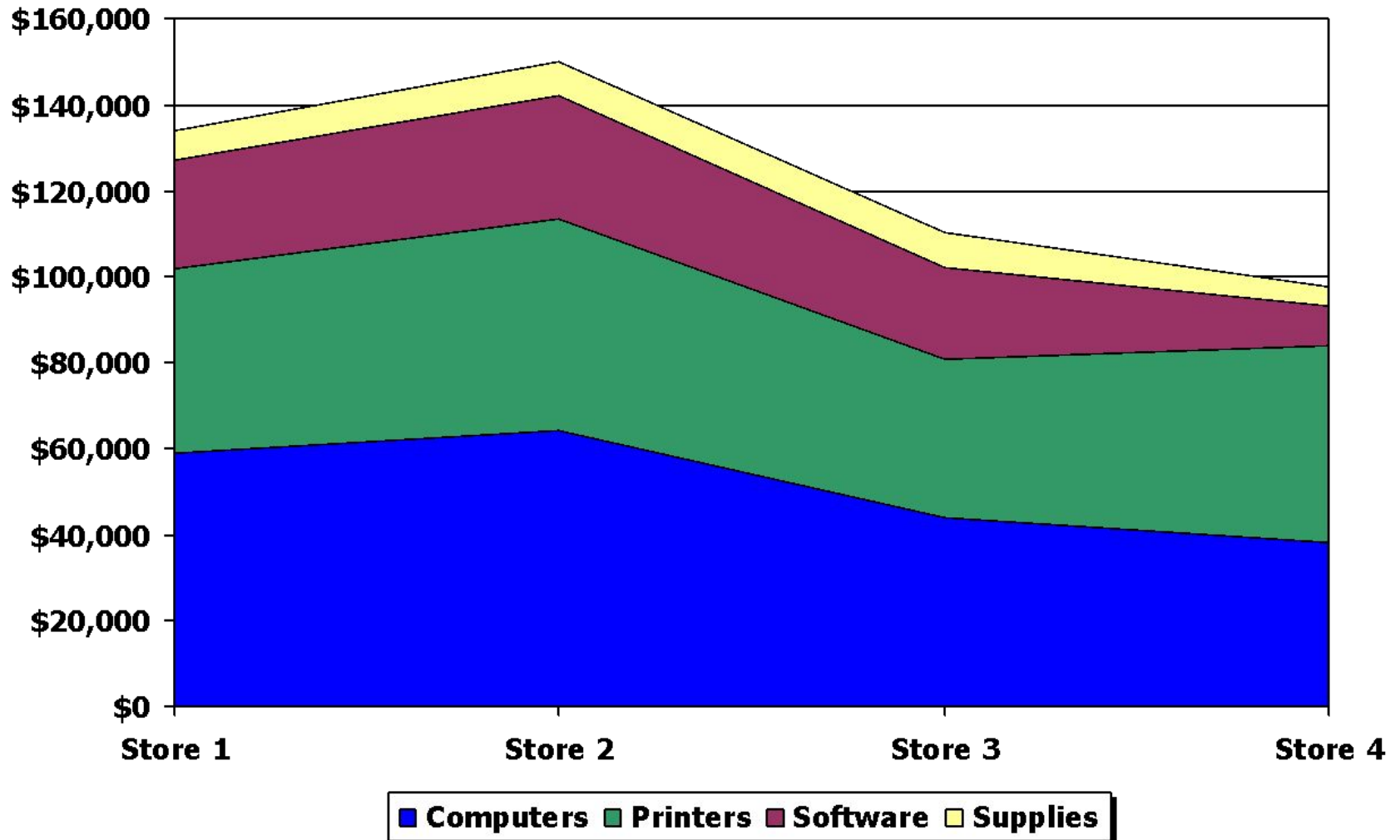
Preparing Tables

- **Use common, clearly identified units**
- **Use the same units for all items in a column**
- **Label column headings**
- **Separate rows and columns**
- **Document data sources**

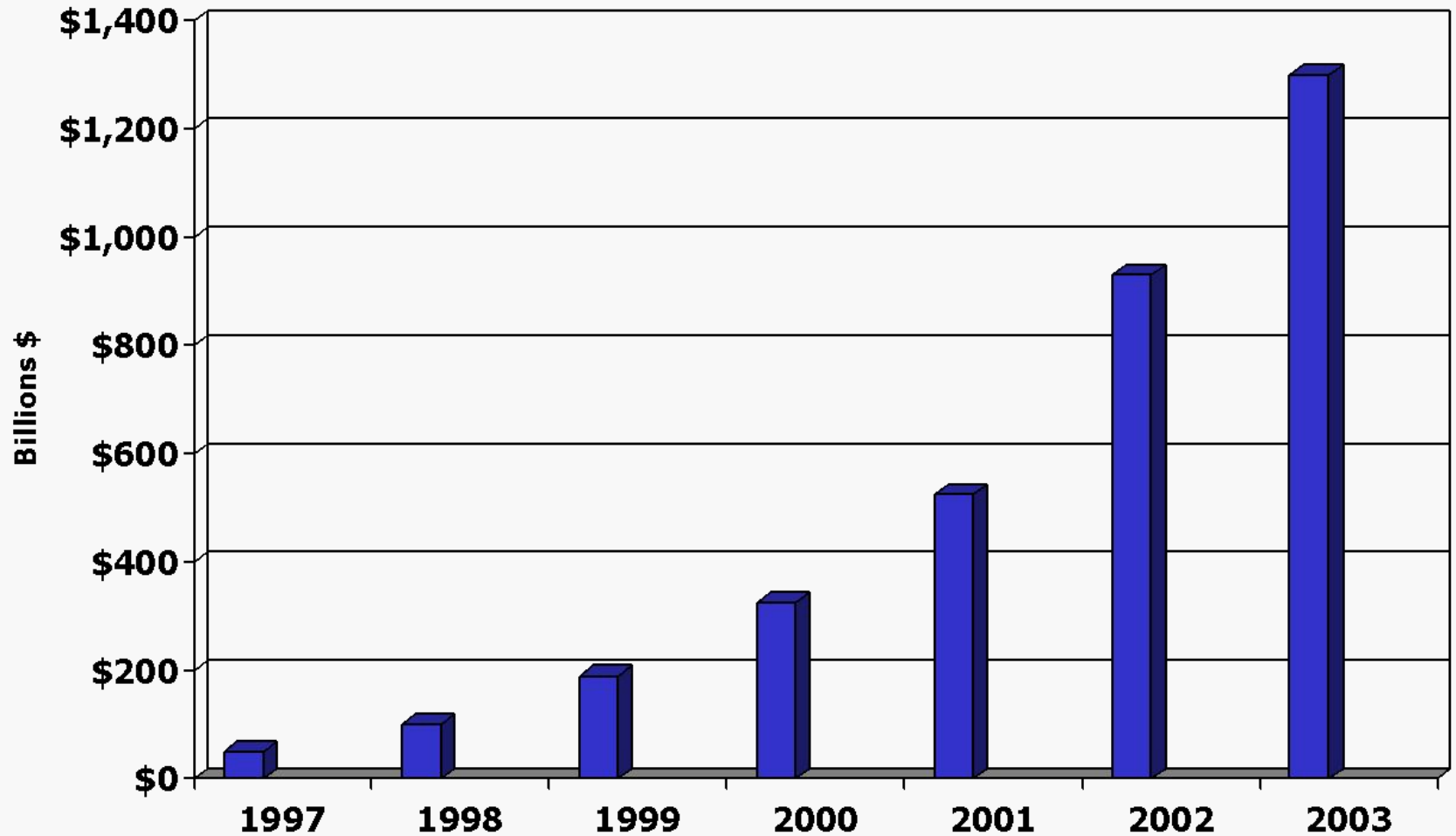
Line Chart: Net Operating Income/Loss of Santa Monica Studios



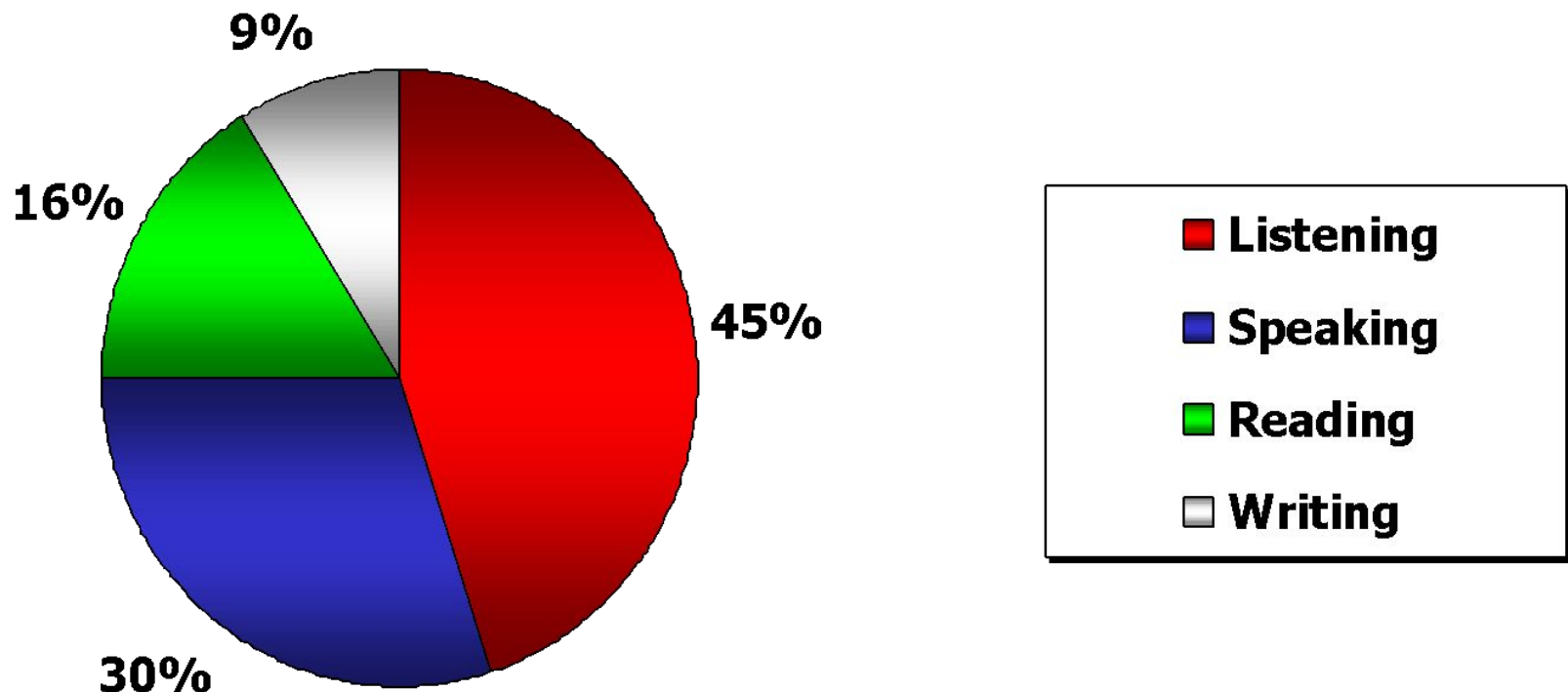
Surface Chart: Average Monthly Sales at Computer Land



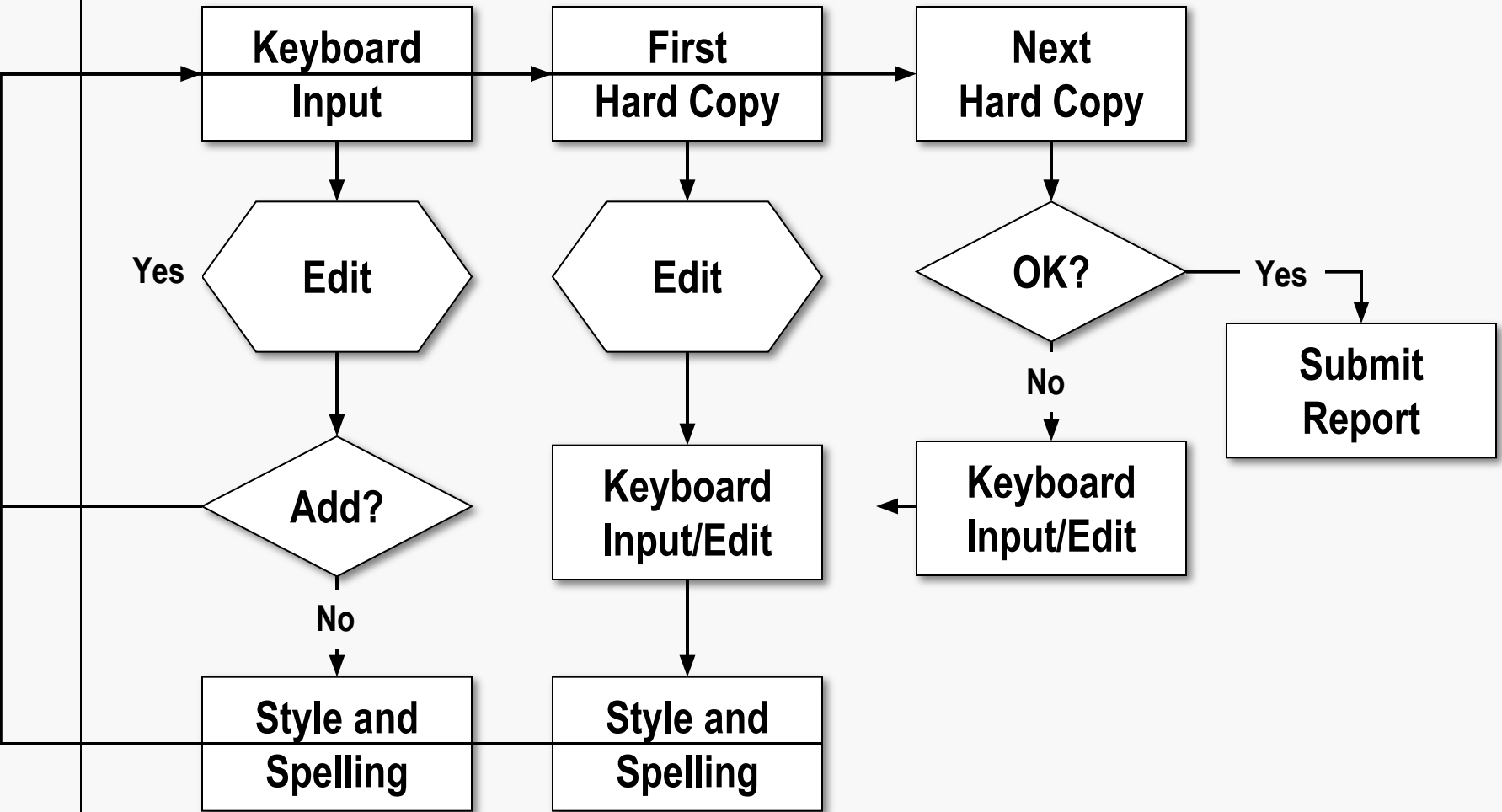
Bar Chart: Total Internet Sales 1997-2003



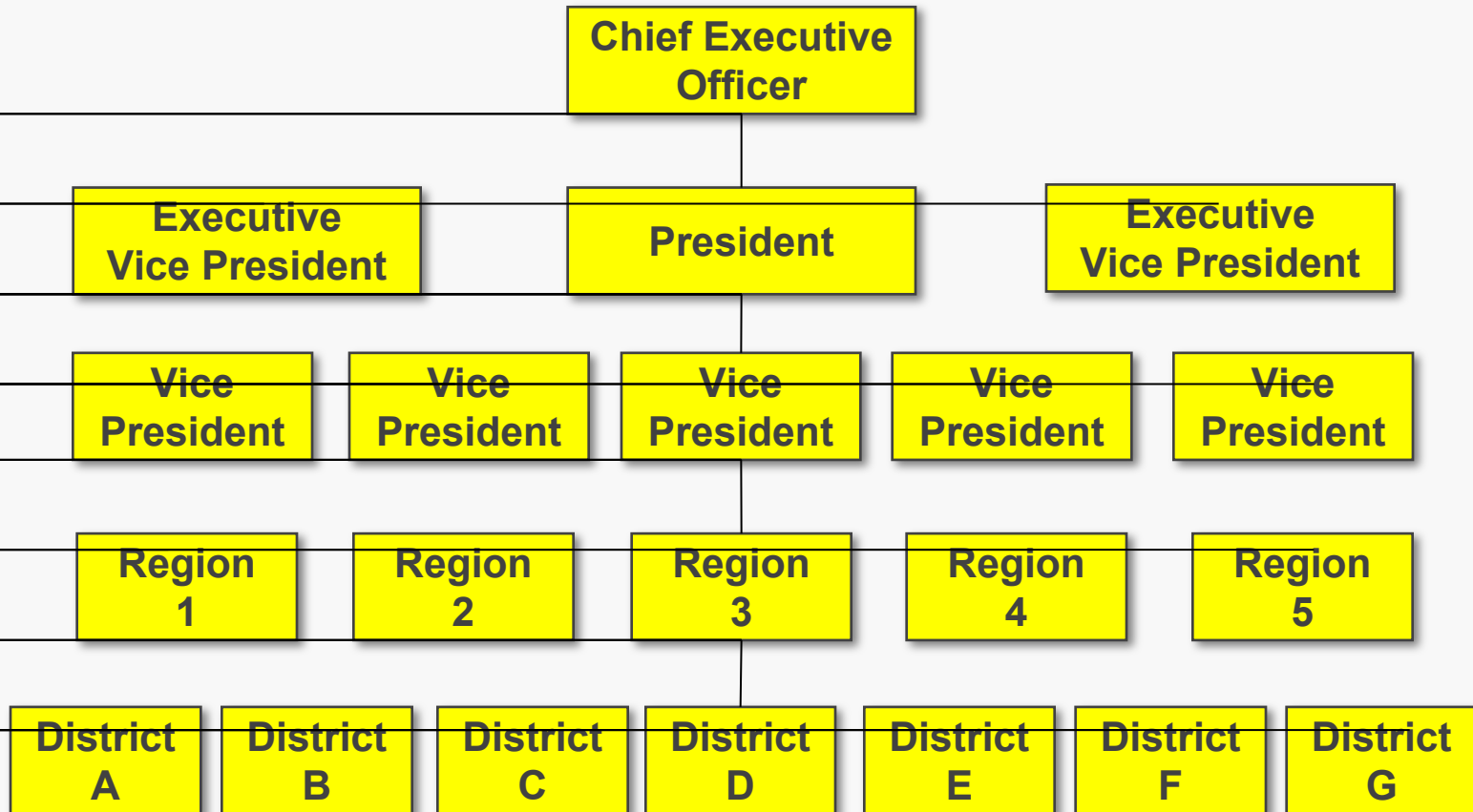
Usage of Business Communication Channels



Flow Chart: The Report Writing Process



Organization Chart



Using Computers to Create Visuals

Advantages

Speed

Accuracy

Ease of Use

Challenges

Image

Message

Audience

Composing Reports and Proposals



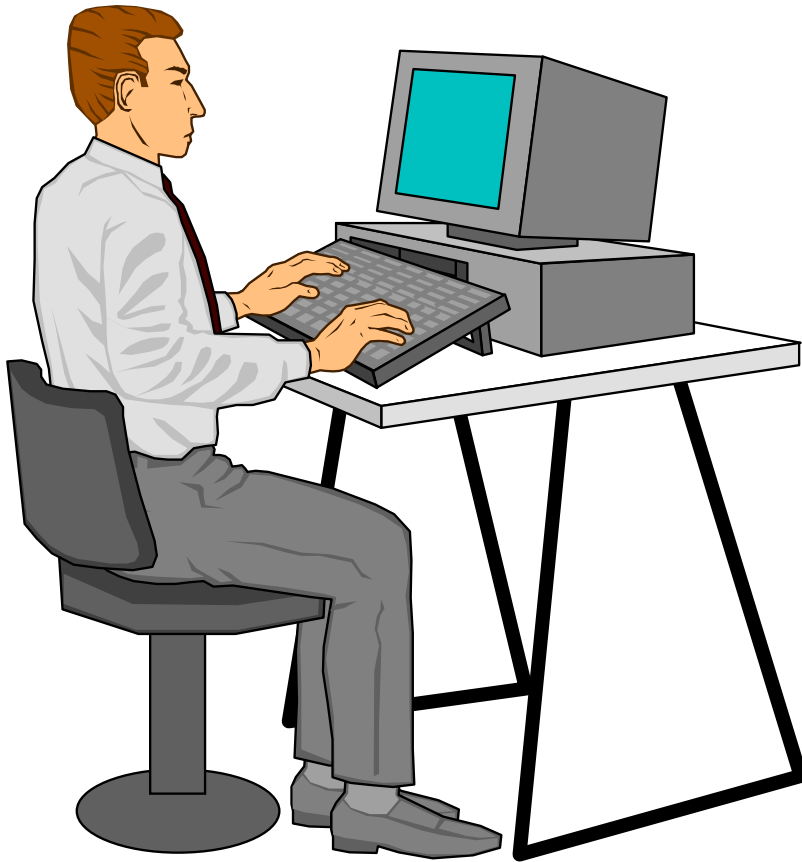
Text and Content

Degree of Formality

Time Perspective

Navigational Clues

Successful Reports



- Accurate
- Complete
- Balanced (*Not biased*)
- Structured (*Maintains a flow*)
- Documented (*Cites credible source*)

Successful Proposals

- **Demonstrate your knowledge**
- **Provide concrete examples**
- **Research the competition**
- **Prove that your proposal is workable**
- **Adopt a “you” attitude**
- **Package your proposal attractively**

The Introduction

**Context
or Problem**

**Subject
or Purpose**

Main Ideas

**Overall
Tone**

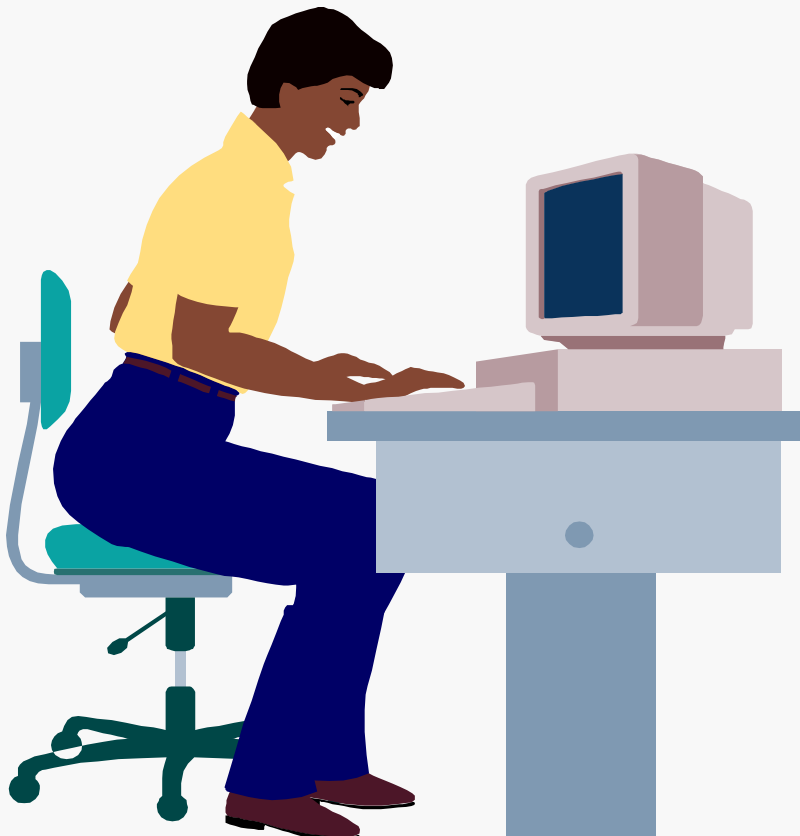
The Body Chapters

Present

Analyze

Interpret

Support



The Closing Section

Emphasizes the Main Points

Summarizes the Benefits

Reinforces the Structure

Brings Action Items Together

Additional Report-Writing Tasks

Formality

Time Frame

Overall Structure



Completing Reports and Proposals

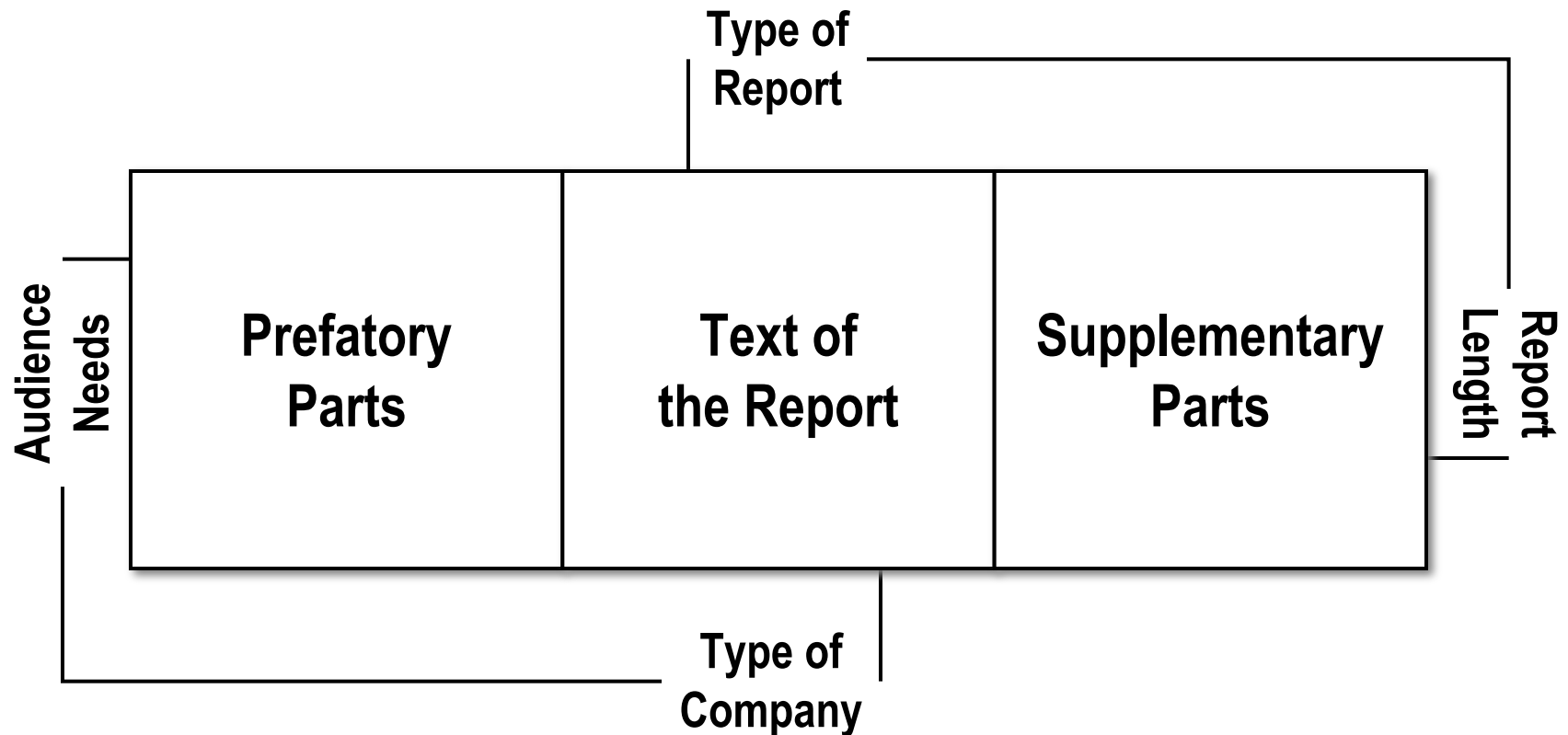


Revising

Producing

Proofreading

Components of Formal Reports



Prefatory Parts

Cover

**Letter of
Authorization**

**List of
Illustrations**

**Title Fly
or Title Page**

**Letter of
Transmittal**

**Synopsis
or Abstract**

**Letter of
Authorization**

**Table of
Contents**

**Executive
Summary**

Text of the Report

Introduction

Body

Closing



Supplementary Parts



**Appendi
xes**

**Bibliogr
aphy**

Index

Components of Formal Proposals

**Proposal
Cover**

Title Fly

Title Page

**Table
of Contents**

**List of
Illustrations**

**Request
for Proposal**

**Executive
Summary**

**Letter of
Transmittal**

Text of the Proposal

