Chapter – Reports (shorter reports)

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The chapter contains

1. Objectives
2. Criteria
3. Types
4. Process

Objectives

Objectives of reports: *Record/document and recommend*

Record   - work done

Record - problems faced

Record - Procedures

Recommend future course of action

Document research findings

Advantages

Information for future reference

Information to large number of people

Types of reports
(internal, short - (1-5 pages)

- Accident/incident reports
- **Feasibility reports**
- Inventory reports
- Staff utilization reports
- Trip/Travel reports
- **L**ab reports
- Performance appraisal reports
- Research reports
- Justification reports
- **Progress reports**

Criteria for writing reports

All reports have basic similarities
1. Organization
    a. Headings
    b. Introduction
    c. Discussion
    d. Findings/conclusions/recommendations
2. Development
3. Style

Development – Reporter's Questions

- **How to develop ideas** – answer the reporter's questions – for all sections

- ***Whom/Who*** – *People*

- people met – trip, investigation, research

- who gave the lecture,

- who was involved in accident,

- who were the respondents,

- who all are reporting, team members

- who will do the work in future

- Who all attended the meeting - MOM

- **When –** *time and date*
- time period of report activities,
- when did the accident occur,
- when did conference take place,
- When was the trip made
- The progress period

- ***Why*** *- objective of report/activity and result*
- why did you travel,
- why was the experiment done,
- why did the result come the way it did (rationale, justification),
- why are you writing the report,
- Why is the furniture/lab/ground/department required

- ***Where –***
- the place of activity,
- place of future activity
- ***What –*** *issue, solution, next*
- subject matter,
- steps taken/solution
- procedures
- Conclusion
- recommendations

1. Organization

Four basic divisions/units in organization

a. **HEADING**

b. Date

c. Name(s) of receiver

d. Name(s) of sender

e. Subject – topic + focus

    1. **Focus - what? - action**

    2. **Topic – what about 'what'?**

    3. **Specify the type of report, name of report/project, reporting time, frequency of report (2nd, 3rd......quarterly, etc)**

f. **E.g.**

    • **Second progress report on functioning of the language lab**

    • **Feasibility report on purchase of ABC software**

    • **Second quarterly progress report on.....**

Organization contd…

1. **Introduction** – necessary – to satisfy multiple readers
2. as audience may differ
3. a time lag might exist – it's a record

1. *Includes……*
2. **Purpose/objective:** (*what and why*)–why – objective/justification/rationale) – what about - exact subject matter
3. **Personnel** – Name of others involved in the reporting activity
4. **Dates** – period of time covered by report

E.g. Trip report

- *Objectives – We attended the National Electronics Packaging Conference in Anaheim, California, to review innovations in vapour phase soldering.*

  What and why??

  It also includes another reporter's Q – what is it??

- *Personnel – Susan Landers and Larry Rosaline* ***Who?***

- *Dates: 26-30 September 2012* ***When?***

2. Discussion

- The largest section of the report - it includes

- ***activities to be reported***
- ***problems encountered***

4. Conclusion/ recommendations

- Summing up

- Lessons learnt

- Future course of action

Style

- Concise writing – avoid wordy phrases, long sentences and paragraphs

- Simplicity – **Use** instead of **utilize** – **begin** instead of **initiate**.

- Use of graphics – tables, charts etc. – e.g. in next slide

- Use highlighting – bold, italics

Example

Johnson County is expected to add 1,57,605 persons to its 1980 population by 2,70,269 by the year 2010. The population jump would be accompanied by a near doubling of the 96,925 households the County had in 1980. The addition of 1,31,026 jobs is forecast for Johnson County by 2010, more than doubling its employment opportunities.

INSTEAD....

Table 15.1 Johnson County predicted growth

	Population	Households	Employment
1980	2,70,69	96,925	1,27,836
2010	4,27,874	1,92,123	2,58,862

Types of reports

- ***Basic structure the same – heading – discussion – conclusion***

- Certain internal differences

- Progress reports

- Feasibility reports

1. Progress reports (PRs)

- *Why progress reports?*
- **Information on progress of work to:**
- Supervisor/Superior
- Funders
- Universities – Ph.D.
- **Next course of action**
- **Regularity of report** – daily, weekly, monthly, quarterly, half-yearly....etc.

Organization of PRs.

1. Heading

1. Date
2. To
3. From
4. Subject – Progress report on **what** and **for which period** (month/quarter/biannual/number) **plus frequency** (2nd ……)..this may not be the sequence

1. **Introduction**
   1. Objectives
      1. **Why** are you working on the project (rationale/justification)
      2. **Or What problems motivated** the project (significance)
   2. **What** is hoped to be achieved (expected outcome and benefits – who will benefit)
   3. **Who** initiated the activity (if assigned to you, then who)
2. **Personnel** – work team, contacts etc
3. **Previous activity** – reminder of work already done - First, 2nd, 3rd.. Etc report – link with previous report

2. **Discussion**

Work accomplished – chronological or importance organization – use subheadings, itemize

Work remaining – list the remaining activities – a table or Gantt Chart

Problems faced (**if any)**– reasons for delay and areas of help – e.g. labour shortage, delay in shipments

4. Conclusion/recommendations

Conclusion – Sum up the work accomplished in reporting period

Recommendations – to change schedule, budget etc – to make better progress

2. Feasibility reports (FRs)

- **Why feasibility report (cost-benefit analysis)**
- Feasibility/practicality of project – money, labour/material, interest rates, taxes, impact on environment, estimated outcome
- Feasibility of purchase of equipment/software/lab
- Feasibility of new product – demand (existing and potential), competition, old/new
- Feasibility study and report

Organization of FRs

1. Heading
   1. Date
   2. To
   3. From
   4. Subject – FR on XYZ project
   Or FR on installation of IP phones

- II. **Introduction** (overview, background)
  - *Purpose* / **Objective**
- *- What* problem motivated the study
- Or *Why* talk about feasibility of any project/equipment – *what is the problem*
- e.g. lack of water, equipment that improves co. working, current equipment time consuming etc
- *Who* initiated the study, *who* requested the report etc
- *Personnel - who* are the team members, contacts/vendors

Organization of FRs

III. Discussion

1. *Criteria* – basis/parameters to study feasibility – cost, environment, income, benefits, vendor etc.

2. *Analysis* – compare your findings with criteria – compare with existing (if any)

IV. Conclusion and recommendations

1. Conclusion – Significance of findings

2. Recommendations – next course of action/which on feasible or best

DATE: 13 August 2012

TO: Mrs. Raksha Mehta, Manager, Projects

FROM: Dinesh Rajen, Purchasing Agent

SUBJECT: Feasibility report on technology purchases

Introduction

Purpose

- *Why?*
- *Expected outcome?*
- *Who will do the study?*
- *Who requested ?*

The purpose of this report is to study which technology will best meet your department's communication needs and budget. After analyzing the feasibility of various technologies, Purchasing will recommend the most cost-effective technology options.

Problem

According to your memo dated 1 August 2012, your department needs new communication technologies for the following reasons:

1. *Your department has hired three new employees, increasing your headcount to 10 project managers.*

2. *Currently, your department has only five pagers. This allows too few of your employees to communicate with home office while they are on job-related travel*

3. *To accommodate your personnel growth and the company's expansion, Project Management requires more and better portable means of communication technology. These include laptops, handheld computers, and cell phones.*

- ***Personnel***

Our vendor contacts are as follows:

1.Electek –Steve Ross – stever1@electek.com

2…………………………..

- ***<u>Discussion</u>***

Criteria

The following criteria were considered to determine which communication technology would best meet Project Management needs:

1. Use – requirements best suitable
2. Maintenance – service agreements
3. Service Personnel – repair and equipment training
4. Warranties – time period
5. Cost - budget

Analysis

Need assessment – current status

Vendor evaluation – Who will meet the above criteria

Cost analysis – whether laptops, cell phones or handheld – meeting all use and cost criteria

- **Conclusion**
- *Laptops and cell phones are not feasible options as laptops are too expensive and cell phones do not provide the communication tools you require. Handheld computers are cost effective and provide you word processing, email and internet access.*
- **Recommendations**
- *Given the combination of all criteria, Electek is our best choice for purchase. Handheld would be best – **explain why***

Other report types

- Annual report

- Project report

- Sales report

- Market search

Annual Reports

- **Why:**
- assess year's operations - companies' view on upcoming year, companies' place and prospects - profit and not-for-profit organizations.
- potentially effective marketing tool - on company fortunes - many medium-sized and large companies devote large sums of money to making their annual reports as attractive and informative as possible.
- Target audience – Employees, customer, shareholder, suppliers, the community,

Contents of Annual Report

- General description of industry(s) in which company involved.
- Audited financial statements
- Management's discussion and analysis (MD&A) - business's financial and other aspects- future strategies.
- Brief description of company's business in recent year.
- Information on - company's various business segments.
- Listing - company's directors and executive officers, their principal occupations, - if a director, the principal business of the company that employs him or her.
- Market price of the company's stock and dividends paid.

Detailed contents

- **Key highlights** of the company in terms of financial and non-financial achievements
- **Letter from chairman** – highlighting the Vision, mission and key achievements of the company
- **The team** – Board of Directors - names and photos
- **Product or category-wise report** – retail, petrochemicals, manufacturing, telecommunication, or product wise – Vision& Mission of each, performance, achievements,

- **Directors' report** – general financial performance of the company, Directors' responsibilities, Directors and Key management personnel, number of Board meetings, board evaluation, R&D, etc

- **Management Discussion and Analysis** – overview of the industry, overview of the company's business and strategies – **human resource** – acquisition, diversity, development, engagement, investments, risk management, internal financial control systems,

- **Corporate Social Responsibility**

- **Awards and accolades**

- **Financial highlights** – Ratio analysis, Share price performance, Shareholdings, Balance Sheet, Profit and Loss account, Auditor's report, Cash Flow,

References

- https://www.yourarticlelibrary.com/accounting/annual-report/10-important-contents-of-an-annual-report-company-accounts/67321

- https://www.exchangeconnect.in/blog/top-10-important-sections-in-an-annual-report/

- https://www.inc.com/encyclopedia/annual-reports.html.

Sample annual reports

- https://www.ril.com/ar2018-19/ril-annual-report-2019.pdf

- https://www.tcs.com/content/dam/tcs/investor-relations/financial-statements/2018-19/ar/annual-report-2018-2019.pdf

- https://tourism.gov.in/sites/default/files/2020-02/Annual%20Report%20Tourism%202019_20_Final.pdf

Project Report

- Cover page – title, to, authors, date
- Abstract
- Acknowledgment
- Table of contents.
- List of illustrations
- Introduction – goal, objective, intended outcome, scope, project period, who authorized, team, stakeholders
- Discussion - Experimental techniques and methods / methods used to complete the project - Results –
- Summary/conclusions
- References
- Glossary
- Appendices (if used)

References for project report

- https://pats.cs.cf.ac.uk/wiki/lib/exe/fetch.php?media=project-report.pdf

Sales report

- **Sales reports help managers:**
- How much time different sales persons are spending on sales activities
- Are they meeting their targets
- Are their efforts leading to sales
- Helps to give a picture of what sales rep. is doing as manager cannot be there
- see the success of the sales team

To make report

- **The report should answer following questions:**

- meeting your sales goals?

- revenue versus expenses for the chosen time period?

- team's sales compare to previous periods (ex: previous quarter, previous year)?

- Which products and services are selling the most?

- Which products and services are not meeting expectations?

- sales forecast for the next month/quarter/year?

- key areas for opportunities? Do you need to divide a territory or ask for executive assistance to close a big account?

- What are key challenges? Is it time to pull back from a territory or product line?

- Manager's report comes from frequent reports of sales persons –

- Call report - number of calls made, specific type of calls, absence of certain calls, excessive number of certain calls, average length of call

- Productivity report – outbound calls, conversations, voice mails, emails, customer meetings, product demonstrations – compare this report with benchmark

- Pipeline report – total prospects sales person working on – how many convert to sales/or lost – time taken

Daily sales report

- Number of meetings set up by a rep
- Number of client conversations by rep
- Lead response time by rep
- Number of outbound calls by rep
- Number of sales opportunities
- Number of new leads created by rep
- Number of sales/closed deals
- The total volume of daily sales
- Average transaction size
- Total orders and average units per customers

Weekly reports

- Number of outbound calls
- Sales volume by channel
- Sales opportunity score
- Revenue closed by rep
- Customer lifetime value
- Average purchase value
- Client meetings attended by rep
- Lead-to-opportunity ratio
- Lead conversion ratio
- **Monthly reports, Sales forecast reports**

Reference for sales report

- https://www.salesforce.com/ca/blog/2017/01/7-steps-to-create-a-sales-report.html
- https://www.datapine.com/blog/sales-report-kpi-examples-for-daily-reports/#daily-sales-reports

Case Study evaluation

- **What**
- A qualitative research method
- A story about something unique, special or interesting – can be individuals, organizations, processes, programmes, neighbourhoods, events, etc.
- Often based on real situations – modifications made to protect individuals/institutions
- Most case studies do not have one or clear solution
- Case study methods used in India since ancient times – *Panchatantra* by *Vishnu Sharma* – 2nd Century BC.
- *Chandragupt Vikramaditya* was know to crack many case studies on social, political and managerial issues

How

- Static and dynamic
- Static – Understand the situation then with resources available then
- Dynamic - understand from current situation POV.
- Follow the four-step process
- Thorough reading for understanding the case
- Applying SWOT to the company
- Developing and evaluating solutions
- Making recommendations

Step-1: Thorough reading for understanding the case

- Read several times to grasp the problem
- Check for information in table, graphs, etc
- Underline/list the most important facts and figures
- Many problems – identify the crucial one and separate from non-essential ones and why are the problems occurring – do facts/figures indicate.
- What can you do..

- Previewing – headings, subheadings, highlighted text, examples, illustrations, tables, graphs.
- Skimming – helps locate relevant sections among all – start reading from beginning- take your eyes quickly over text – read some words of each paragraph.
- Scanning – Same as skimming, but you stop at information – read
- Intensive reading – read, make notes, underline unfamiliar and relevant information, data, words – read many times till you understand
- Critical reading –pro and cons of problems and solutions – what is missing - SWOT of the company in question
- Identify the problem statement of case

Step-2: Applying SWOT of company

- After SWOT understand or answer the following:
- Why the problem occurred
- How its affecting/affected the company's performance
- Does the problem come from a changing environment, declining market share, inefficient internal or external processes – identify where the company is strong or weak – what internal or external strategies it has formulated.

Step-3: developing and evaluating solutions

- Analyze the weakness and strengths to figure out the competitive advantage of the company – don't allow biases
- Start to think of solutions and evaluate them by asking:
  - What is the most suitable solution
  - Why "that" solution – justification
  - Are there any pitfalls in this solution – too expensive, operationally not feasible - check that too

Step-4: Recommendations

- State your best solution
- Give justification
- Why alternative solutions were not selected
- Give a cost-benefit analysis of the solution

Process

Prewriting – can use various techniques of prewriting – brain storming, mind mapping etc. – prepare outline and data, assess audience

Writing –

- Review prewriting – ideas, sentence length, words etc
- Omissions or details depends on level of audience
- Draft text
- Organize content – use any method of organization

Process

Rewriting

1. Add details for clarity
2. Delete dead words or phrases for conciseness
3. Simplify words and phrases
4. More information in discussion
5. Reformat – visual aid usage
6. Enhance style – quantify, personalize
7. Proofread and correct errors
8. Avoid sexist language –Foreman – Supervisor, Chairman-chairperson etc.