Reports

# What is the purpose of a report?

The report allows its recipient to make a decision to act.

In most cases, a report is written in response to a request from a manager who needs information on an issue to make a decision. However, an assistant can also write a report on his/her own initiative. It is a very professional way to present a proposal to the manager (reorganization or purchase of equipment, for example). There are different types of reports, and the plan may vary depending on the type of report. However, this suggested method applies in all cases.

## Step 1 - Clarify the request.

This is the first step that will guide all your work and usefully define the scope of your work.

* The recipient of the report
* What exactly does he/she expect from you?

What are the issues at stake?

What will the report be used for?

What does your manager already know about the subject (to avoid overwhelming him or her with information he or she already knows)?

Is he or she aware of existing studies on the subject?

## Step 2 - Gather and process the necessary information.

There are many sources of information, both internal and external. They can be interviews, documentation, reading notes, reports, etc. It is important at this stage to be exhaustive without being overwhelmed by the information.

Select the information that is most relevant to the request.

## Step 3 - Make your plan.

The report is usually organized according to the classic plan: introduction, development, conclusion.

This is a classic plan. Depending on the type of report, the development may be different, but the introduction and conclusion will have the same role.

# Things to remember.

### To be effective, it is important to take care of the first step and therefore to understand the request. This is fundamental in order to respond properly and avoid irrelevance.

### As opposed to the minutes, the author of the report takes a position and gives his opinion.

### The report is above all an operational document. Your manager must quickly find the answer to the question he is asking himself. The form (structure, writing and layout) is therefore very important.

### Make sure you make your recommendations and conclusions clear.