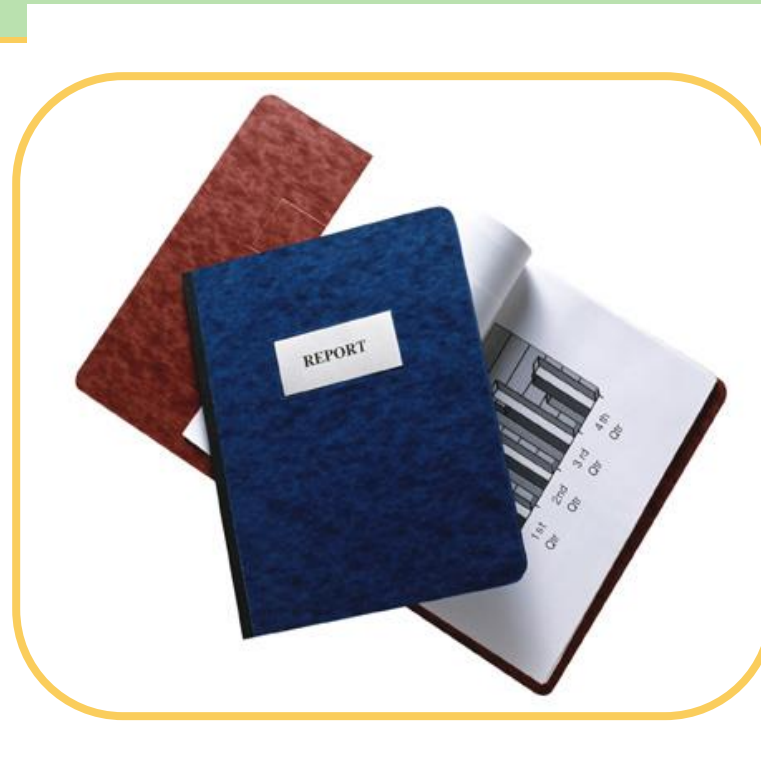


CHAPTER TEN

Basics of Report Writing



Overview


- ? Define report writing.
- ? Identify and state the problem.
- ? Determine the factors.
- ? Gather information.
- ? Interpret the data.
- ? Organize the findings.
- ? Create topic and talking headings.
- ? Write the report.
- ? Collaborate effectively.

What are reports?

An orderly and objective communication of factual information that serves a business purpose

Determine the Report Purpose

- ❑ Conduct a preliminary investigation
 - ❑ Gather facts to better understand the problem
 - ❑ Consult many sources
- ❑ State the problem in writing
 - ❑ To serve as a record
 - ❑ To allow others to review it
 - ❑ To force the writer to get the problem clearly in mind



State the problem in one of three ways.

1 Infinitive phrase:

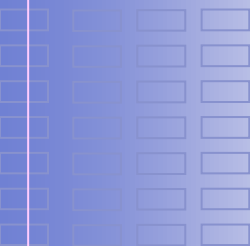
"To measure the effect of radio spot advertising on X company sales"

2 Question:

"What are the effects on X company sales of radio spot advertising?"

3 Declarative statement:

"Company X wants to know how a spot advertising campaign will affect its sales."



Determine the Factors

Types of Factors

- ❑ Subtopics in informational and some analytical reports
- ❑ Hypotheses in problem-solving situations
- ❑ Bases in comparison reports

State the Problem and Factors

Use the infinitive form with subtopics.

A consumer research organization plans to test three leading low-priced automobiles in an effort to determine which one is the best buy as a family car for the typical American consumer.

Problem statement

To determine which of three economy cars is the best buy for the American Consumer

Factors

Durability

Operating costs

Comfort

Original and trade-in costs

Repairs

Safety

State the Problem and Factors

Use the question form with subtopics.

A national chain of dress shops wants to learn what qualities to seek in hiring sales personnel.

Problem statement

What qualities determine the successful salespeople for X Dress Shop?

Factors

Education

Cultural Background

Experience

Vital Statistics (age, height, weight, marital status, religion, etc.)

Personal qualities (personality, character, etc.)

State the Problem and Factors

Use the question form with subtopics.

A daily newspaper wants to know how well the various types of items in a typical issue are read.

Problem statement

What is the readership of the types of items in a typical issue of X newspaper?

Factors

Probably such a study would involve an item-by-item survey. The items would be classified by types, which would be the factors of the problem.

World news

Local news

Society

Editorials

Sports

Comics

State the Problem and Factors

Use the question form with hypotheses.

You've been assigned the problem of determining why sales at the Moline store have declined.

Problem statement

Why have sales declined at the Moline store?

Factors

Activities of the competition have caused the decline.

Changes in the economy of the area have caused the decline.

Merchandising deficiencies have caused the decline.

Changes in the economic environment have caused the decline.

State the Problem and Factors

Use the infinitive form with bases of comparison.

A major soap manufacturer wishes to determine which of three cities would be best for a new factory.

Problem statement

To determine whether Y company's new factory should be built in City A, City B, or City C.

Factors

Availability of labor

Abundance of raw material

Tax structure

Transportation facilities

Nearness to markets

Power supply

Community attitude

Gather Information

? Primary

- ? Observation
- ? Experiments
- ? Surveys
 - ? Telephone
 - ? Mail/Email
 - ? Web surveys
 - ? Interviews (personal, expert)
- ? Company records (raw data)

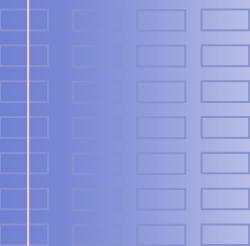
? Secondary

- ? Library
- ? Online
- ? Company records (interpreted data)



Interpret the Data

Advice for avoiding human error

- ? Report the facts as they are.
 - ? Draw conclusions only when appropriate.
 - ? Do not interpret lack of evidence as proof to the contrary.
 - ? Be sure your data is comparable.
 - ? Be sure you draw only logical conclusions.
 - ? Be sure the data are reliable and representative.
 - ? Give attention to all important facts.
- 

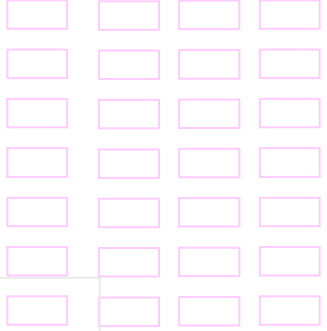



Attitudes and Practices Conducive to Sound Interpreting

- ❑ Maintain a judicial attitude.
- ❑ Consult with others.
- ❑ Test the interpretations.
 1. Test of Experience
 - “Is this conclusion logical in light of all I know?”
 2. Negative Test
 - Examine the opposite interpretation--build a case for it.

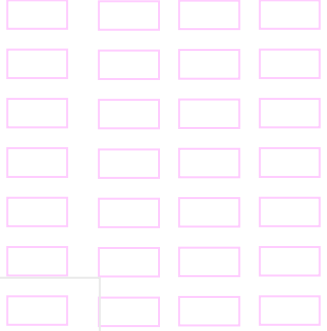

Use of Statistical Tools in Interpretation

- ❑ Statistical tools enable writers to simplify data.
- ❑ Most readers can understand descriptive statistics.
- ❑ Writers should explain explicitly statistical techniques used.



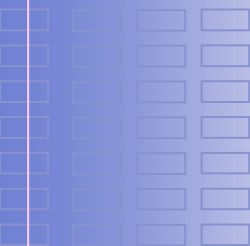
Q. A study produced data that showed United States college students to be far behind their comparable groups in European countries. The conclusion was made that the educational systems in these European countries are superior to that in the United States.

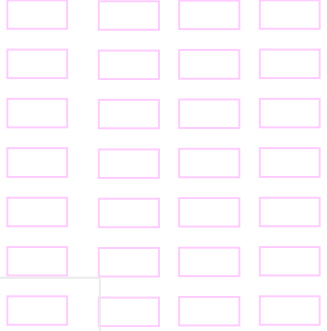

A. The education systems are not comparable. The United States is committed to a system of educating the masses. Many of the other countries maintain a system of highly selective education.



Q. The editor of a leading magazine for businesspeople reported that unsolicited email she had received from her readers justified a conclusion that the public favored stronger government controls over unions.


A. Does the editor receive mail from readers representative of the public? More than likely the group writing her consists of limited segments of the total population.


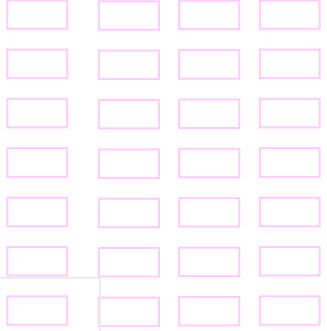
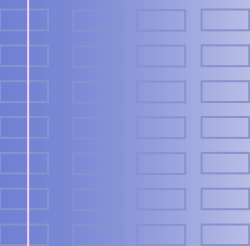




Q. A campus survey at a Midwestern university showed that 92 percent of the students of the Christian faiths favored a certain issue, but only 33 percent of Hindu students favored the matter. The conclusion reached was that Christians and Hindus were far apart on this matter.

A. The statistics for Hindu students were based on unreliable data. Since few Hindu students attend our universities, most likely the sample was small.



- 
- 
- Q.** A report writer found data showing that sales of soft drinks were correlated with vacation travel. She concluded that soft drink sales were heavily affected by vacations.
- A.** Probably both are related to seasonal factors. They have no cause-effect relationship.
- 

Organize the Information


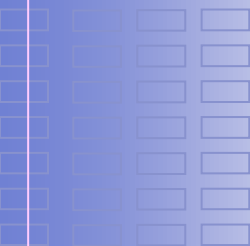

An organizational plan

- ❑ serves as a blueprint for the report
- ❑ insures order in the report
- ❑ provides headings for use in the report



Steps in Organizing the Information



- 
- ❑ Construct an outline for the report.
 - ❑ Write it out to insure order in the report.
 - ❑ Incorporate topics in text of headings.
 - ❑ Use either the conventional or decimal division format.
- 
- 

Conventional System

- I. First-level heading
 - A. Second-level heading
 - B. Second-level heading
 - 1. Third-level heading
 - 2. Third-level heading
 - a. Fourth-level
 - (1) Fifth-level
 - (a) Sixth-level
- II. First-level heading
 - A. Second-level heading
 - B. Second-level heading
 - Etc.

Decimal System

1.0 First-level heading

1.1 Second-level heading

1.2. Second-level heading

1.2.1 Third-level heading

1.2.2 Third-level heading

1.2.2.1 Fourth-level

2.0 First-level heading

2.1 Second-level heading

2.2 Second-level heading

Etc.

Procedure for Constructing an Outline by Process of Division (1 of 3)

I.
Introduction

II.

III.

IV.

V.

Step 1

Divide the whole into comparable parts. This gives the Roman number parts of the outline. Usually an introduction begins the outline. Some combination of summary, conclusion, recommendation ends it.

Procedure for Constructing an Outline by Process of Division (2 of 3)

I.

A
B
C

II.

A
B

III.

A
B
C

IV.

A
B

V.

A
B

Step 2

Divide each roman section. This gives the A., B, C headings.

Procedure for Constructing an Outline by Process of Division (3 of 3)

I.

A
B
C

II.

A	$\begin{matrix} 1 \\ 2 \end{matrix}$
B	

III.

A
B
C

IV.

A	
B	$\begin{matrix} 1 \\ 2 \\ 3 \end{matrix}$

V.

A	
B	$\begin{matrix} 1 \\ 2 \end{matrix}$

Step 3

Then divide each A, B, C heading.
this gives the 1, 2, 3 headings

Continue dividing as long as it is
practical to do so.

General Bases for Division

? Time

? Place

? Quantity

? Factor



Organization of a Report on the History of Manufacturing in New York

Main Heading Possibilities (1 of 4)

Organization by time

- I. Introduction
- II. Before 1750
- III. 1750-1800
- IV. 1801-1850
- V. Etc.



Organization of a Report on the History of Manufacturing in New York

Main Heading Possibilities (2 of 4)

Organization by place

- I. Introduction
- II. Northern region
- III. Eastern region
- IV. Southern region
- V. Etc.

Organization of a Report on the History of Manufacturing in New York

Main Heading Possibilities (3 of 4)

Organization by quantity

- I. Introduction
- II. More than 500
employees
- III. 20-500 employees
- IV. Less than 20
employees
- V. Conclusion



Organization of a Report on the History of Manufacturing in New York

Main Heading Possibilities (4 of 4)

Organization by factors

- I. Introduction
- II. Textiles
- III. Foods
- IV. Furniture
- V. Etc.

Combination Division Forms

First division by time; second division by time

	I.			
	Introduction			
n				
	II.			
	Before			
1750				
	A.			
	1630-1680			
	B.			
	1681-1710			
	C.			

Combination Division Forms

First division by time; second division by place

I. Introduction

II. Before 1750

A.

Northern region

B. Eastern

region

C.

Southern region

D. Western

region

III. 1751-1800

A.

Northern region

B. Etc

Combination Division Forms

First division by time; second division by factor

I.			
Introduction			
II.			
Before 1750			
A.			
Food			
B.			
Chemicals			
C.			
Textiles			
D.			

Topic or Talking Headings? (1 of 2)

Topic headings identify.

I.

Population

A.

Houston

B.

Springfield

C.

San Diego

II. Income

A.

Houston

B.

Springfield


Topic or Talking Headings? (2 of 2)

Talking headings identify and indicate what is said about that division.

- I. Growing population signals market growth
 - A. Houston leads the nation
 - B. Springfield has steadiest increase
 - C. San Diego maintains status quo

Wording of Headings

- ❑ Parallel Construction
- ❑ Conciseness in Wording
- ❑ Variety of Expression



Parallelism in Construction of Headings

Equal level headings should be in the same grammatical format whether noun phrase, sentence, or decapitated sentence.

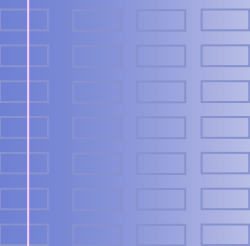
- **Noun Phrase**
 - “High Rate of Sales in District III”
- **Sentence**
 - “District II Sales Rank Second”
- **Decapitated Sentence**
 - “District I at Bottom”

Point out any violations of grammatical parallelism in the following subheads of major division of a report.

- I. Sporting Good Shows Market Increase
- II. Modest Increase in Hardware Volume
- III. Automotive Parts Remains Unchanged
- IV. Plumbing Supplies Records Slight Decline.



Point out any violations of grammatical parallelism in the following subheads of major division of a report.

- A. Predominance of Cotton Farming in Southern Region
 - B. Livestock Paces Farm Income in the Western Region
 - C. Wheat Crop Dominant in the Northern Region
 - D. Truck Farming Leads in Central and Eastern Regions
- 

Conciseness in Wording

Headings should be the shortest possible word arrangement.

Not this:

Personal appearance enhancement is the most desirable benefit of lasik surgery that patients report.

But this:

Personal appearance most desirable benefit.

Variety of Expression

Replace monotonous repetitions of words in topic headings with a variety of words.

Not this:

- A. Illinois Computer Sales
- B. New York Computer Sales
- C. Washington Computer Sales

But this:

- A. Illinois Ranks First in Industry Sales
- B. New York Maintains Second Position
- C. Washington Posts Third Slot

Write the Report

- ❑ Be objective.
 - ❑ Believability
 - ❑ Impersonal vs. Personal Writing
- ❑ Maintain a consistent time viewpoint.
- ❑ Use smooth transitions.
- ❑ Maintain interest.



Impersonal vs. Personal Styles (1 of 2)

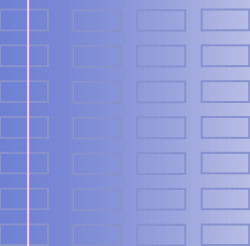


Impersonal

The first week of the period was spent on vacation. Work now is continuing to complete the next annual report. A description of the new high-temperature technique is the item that has come under consideration.

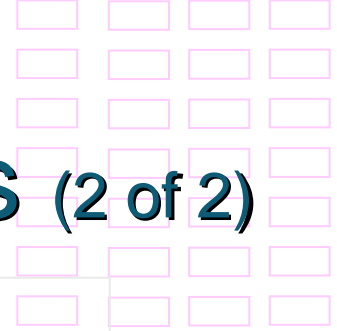
Personal

During the first week of the period, I was on vacation. I now am writing a description of the new high-temperature technique for the next annual report.





Impersonal vs. Personal Styles (2 of 2)

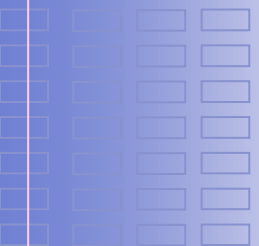



Impersonal

The current period has been devoted to becoming familiar with the new equipment.

Personal

I have spent the current period in becoming familiar with the new equipment.






Maintain Logic and Consistency in Time Viewpoint (1 of 4)

Avoid Illogical Time Shifts

Almost 37 percent of the merchants interviewed favored the Wilson plan. Only 14 percent of them prefer the Borden plan.

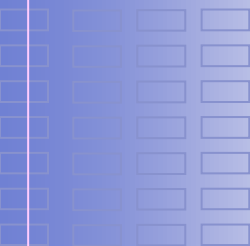



Maintain Logic and Consistency in Time Viewpoint (2 of 4)

Consistent Past

Since Dixie Cola was produced and distributed in the South, there was little difficulty in establishing its identity in that region.

Strong markets were designated as those that required little or no logical adaptation of commercials. Mississippi, Louisiana, and Alabama fell in that category.





Maintain Logic and Consistency in Time Viewpoint (3 of 4)

Consistent Present

Since Dixie Cola is produced and distributed in the south, there is little difficulty in establishing its identity in that region.

Strong markets are designated as those that require little or no local adaptation of commercials. Mississippi, Louisiana, and Alabama fall in that category.



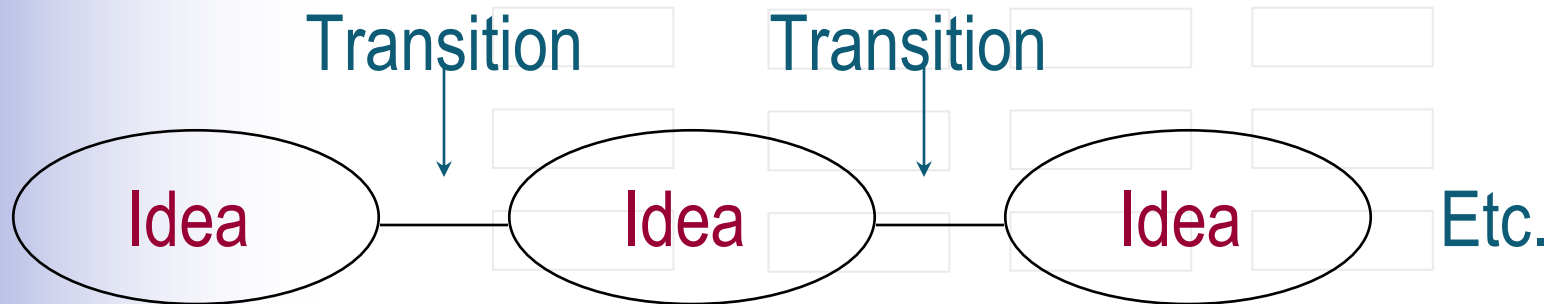


Maintain Logic and Consistency in Time Viewpoint (4 of 4)

Logical Shifts are All Right

Of the merchants interviewed, 54 percent feel that such legislation is needed. Only 33 percent held this position a scant three years ago. Current indications are that the number favoring the bill will be much greater within another three years.

Transitions are Bridges for Moving the Reader Through Your Report





Use of Transition Words to Relate Paragraphs

End of paragraph . . . which makes these visuals among the *simplest* to construct.

Beginning of next paragraph Even though the line graphs are *simple*, *three* errors commonly are made in constructing them. *One* is the common violation of zero origin. The Y scale (vertical axis) must . . .

Beginning of next paragraph *Second* is the error of representing both X and Y scales on the grid by unequal distances. Any deviation from . . .

Beginning of next paragraph A *third* error concerns the determination of proportions of the . . .

End of paragraph . . . clearly is the most *economical* to operate.

Beginning of next paragraph In spite of its *economy*, the Xerox copier presents a major disadvantage. It has the highest breakdown record of the machines tested. In fact, over the past seven months. . .



Transition Though Word Connection (1 of 2)

- ❑ Wormy oranges dumped from a passing ship floated ashore in Texas. **Consequently**, another battle had to be waged against the Mediterranean fruit fly.
- ❑ Transitional elements are essential to understanding. **They** are the mortar that hold bricks of thought together.
- ❑ Before buying plants, be sure you know which varieties are adapted to your area. **Adapted varieties** usually are sold by local nurseries.



Transition Though Word Connection (2 of 2)

- ❑ A knowledge of your subject, a familiarity with words, and a compassion for your reader--**all** are essential to clear exposition.
- ❑ In early spring, prepare the soil. **After the soil warms**, drill the seed at a rate of ten pounds per acre.

Maintain Interest

- ❑ Select words carefully.
- ❑ Watch the rhythm of expression.
- ❑ Stress content over techniques.
- ❑ Be complete without using more words than necessary.

Sequence of Activities Involved in Collaborative Writing Projects



1. Determine Purpose
2. Derive Factors
3. Gather Facts
4. Interpret Facts
5. Organize Facts
6. Plan the Writing
7. Write Assigned Parts
8. Revise
Collaboratively
9. Edit Final Draft

A decorative graphic on the left side of the slide features a vertical green line and several overlapping squares in white, yellow, and orange. A horizontal pink line extends from the left edge across the top of the slide. The background is a light blue gradient with a grid of faint, light blue squares.

“Tenacity and perseverance are essential qualities for success in business.”

--Mary Kay Ash