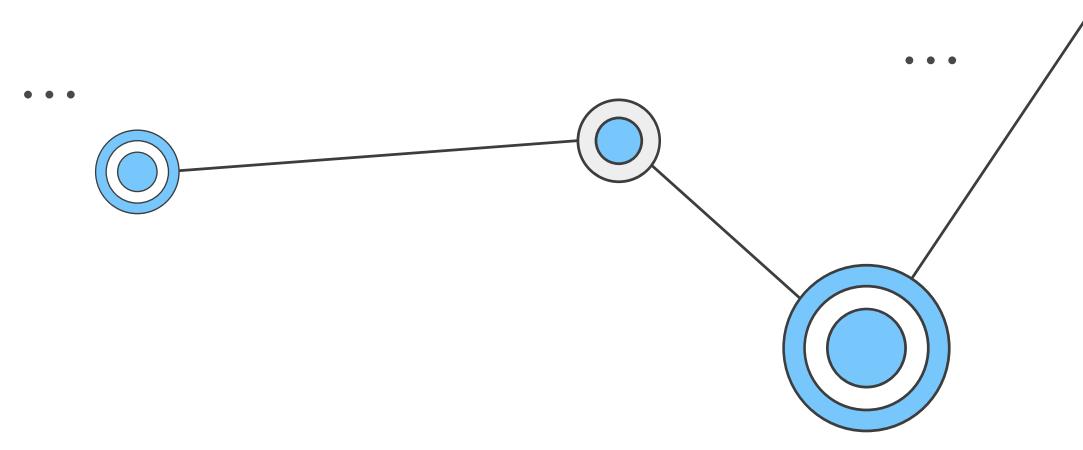
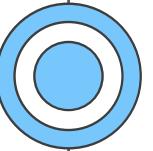


Reports

EAC594

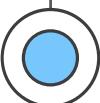




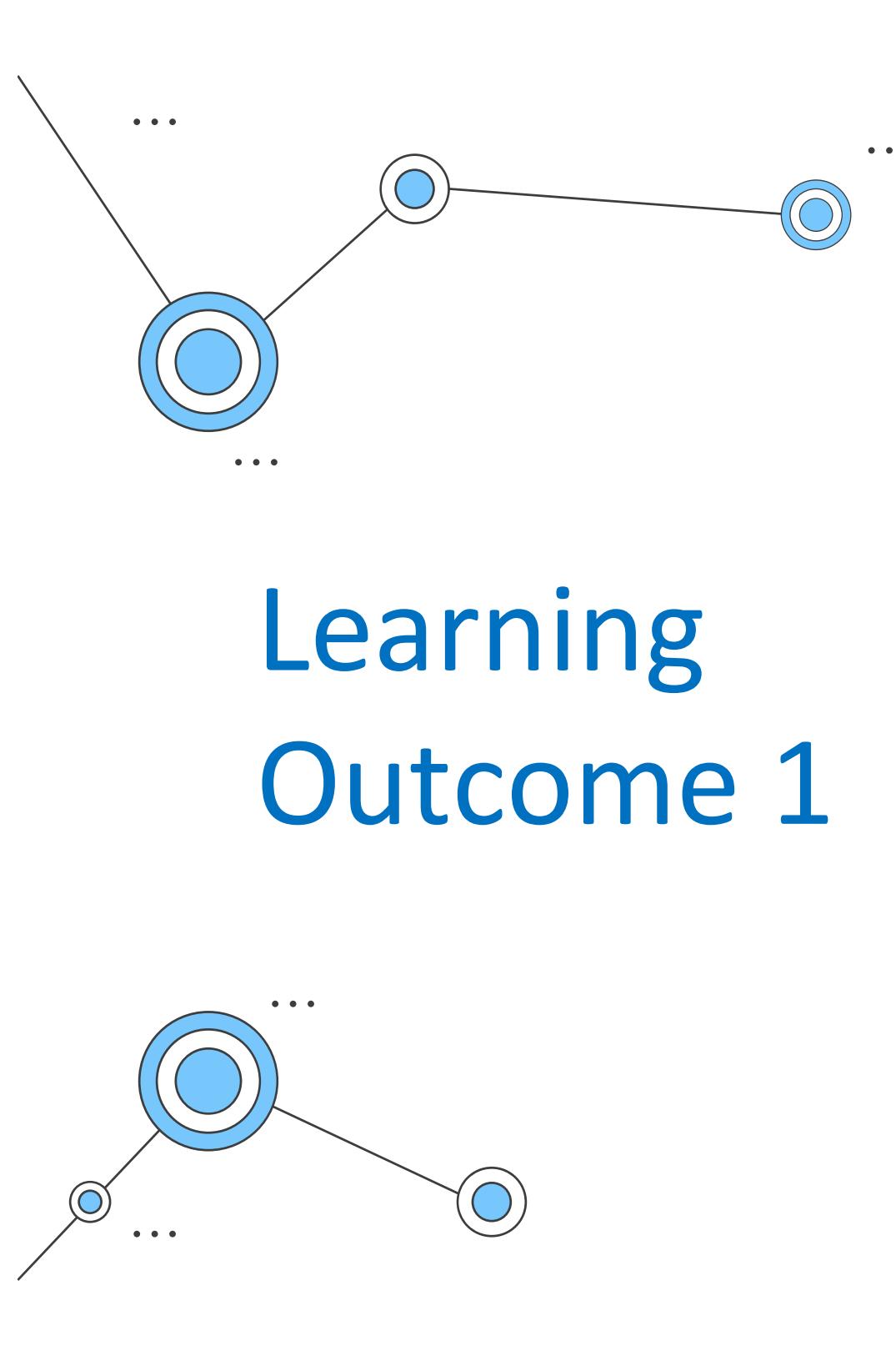
Agenda



Review Chapter 11: Reports

- Unit 37: Report Objective: **Informational and Analytical**
 - Unit 38: **Report Organization**
 - Unit 39: Report Type and **Function: Informal Report**
 - Unit 40: Report Type and **Function: Formal Report**
 - Unit 41: **Report Parts – Informal and Formal**
- 

Learning Outcome 1



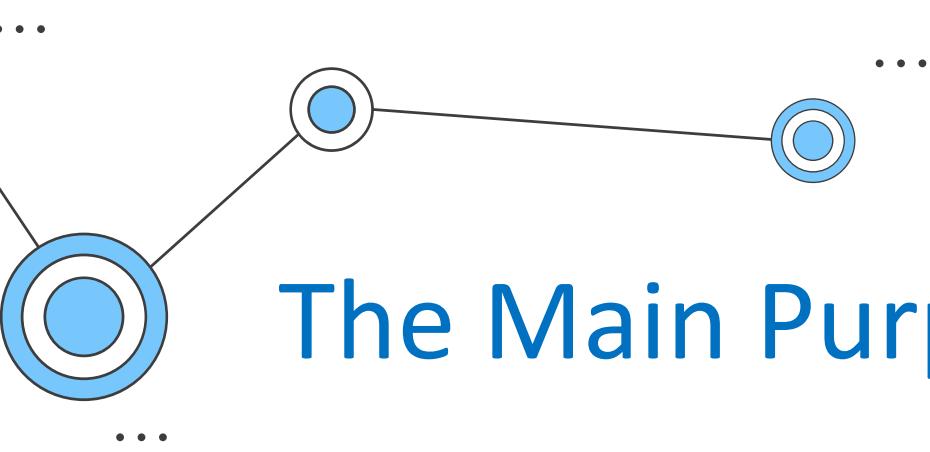
Explore the types of report functions, organizational strategies, and writing styles as well as typical report formats.

What is a report?

A report is a document in which a writer **analyzes findings, draws conclusions, and makes recommendations** intended to solve a problem.

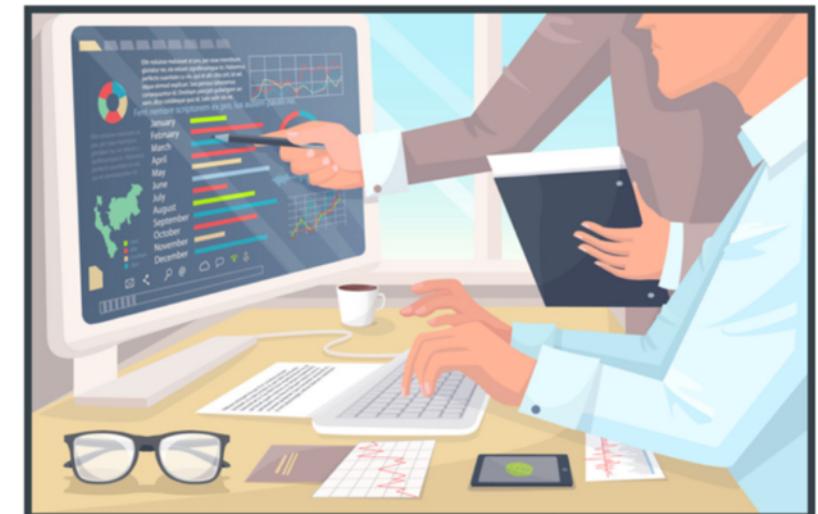


<https://www.vectorstock.com/>

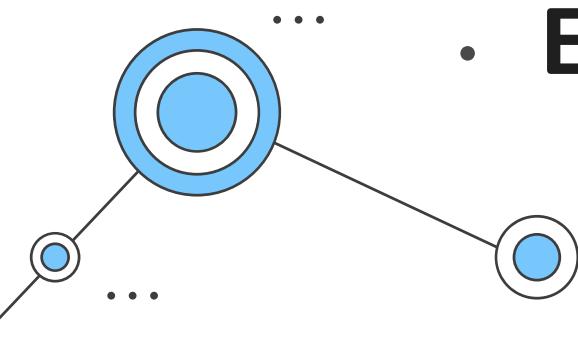


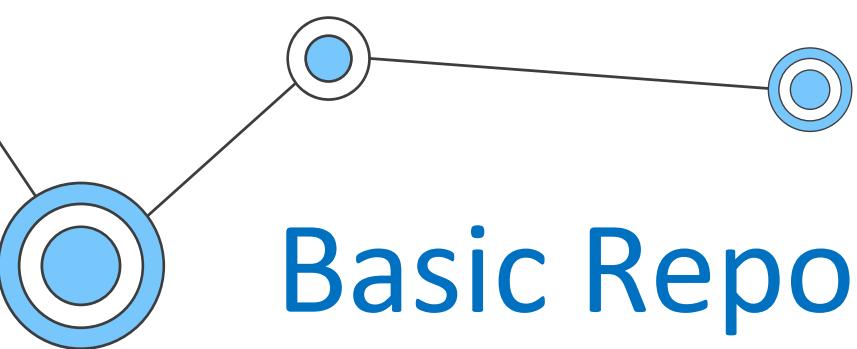
The Main Purposes of Business Reports

- **Convey information**
- **Answer questions**
- **Solve problems**
- **Enable in decision making**



<https://www.vectorstock.com/>



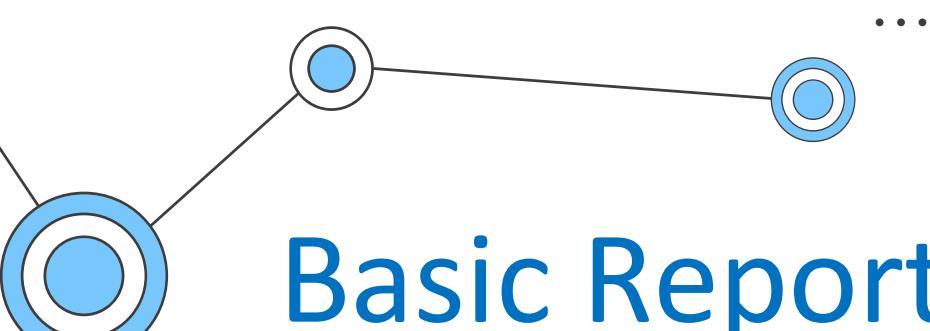


Basic Report Types

- **Informational Report**
- **Analytical Report**



<https://www.vectorstock.com/>



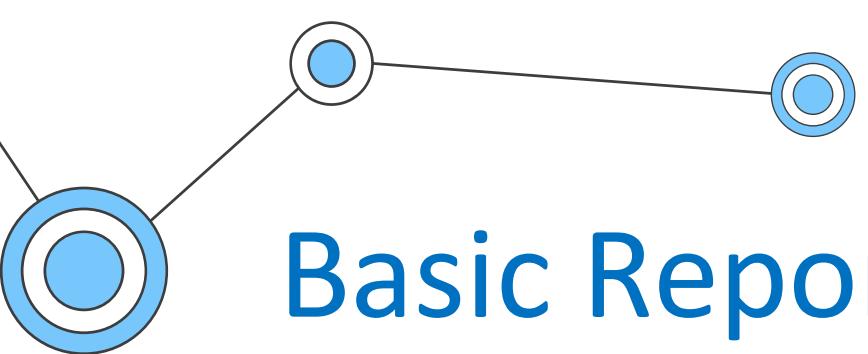
Basic Report Functions

Informational Report

- Present data without analysis or recommendations
- Are routine and often periodic



<https://www.vectorstock.com/>



Basic Report Functions

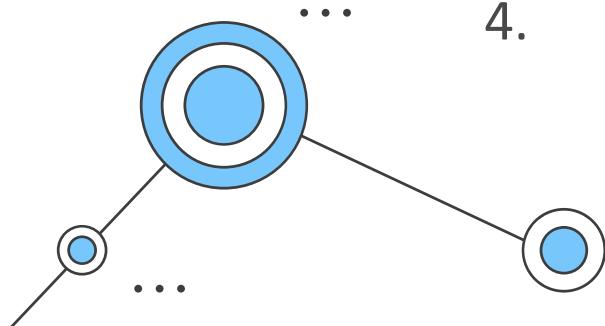
Informational Report

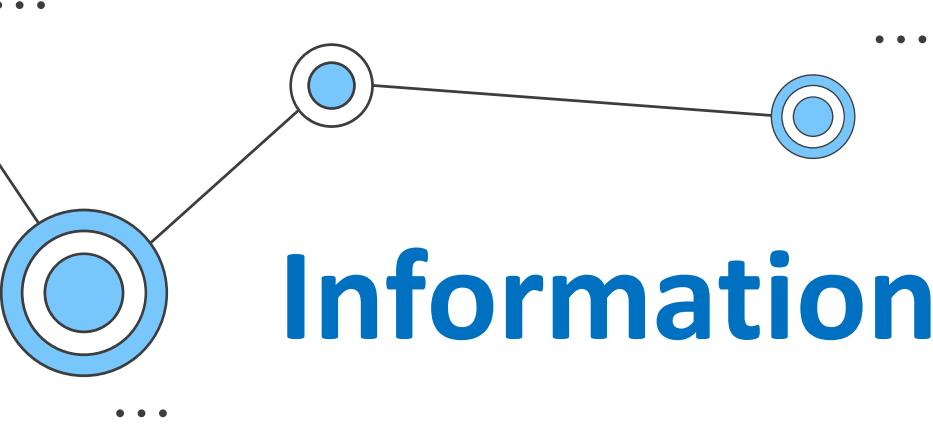
Examples:

1. Summary reports
2. Progress/Status reports
3. Compliance reports
4. Policy/Procedural reports



<https://www.vectorstock.com/>

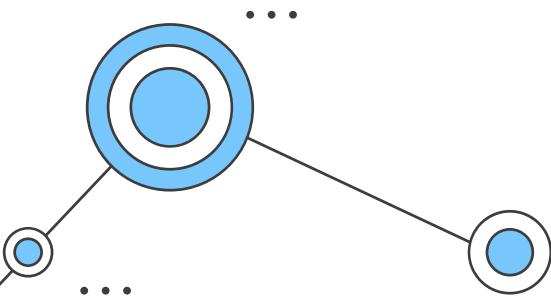


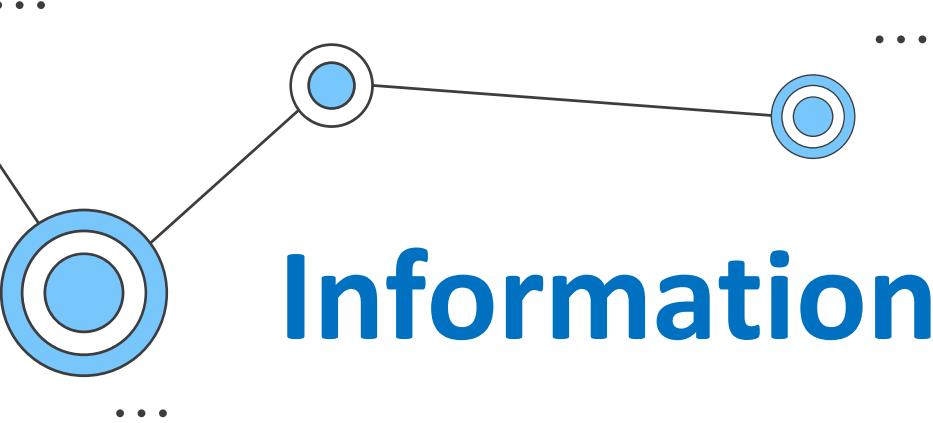


Informational Report

1. Summary Report

Present summaries of the information available on a given subject.

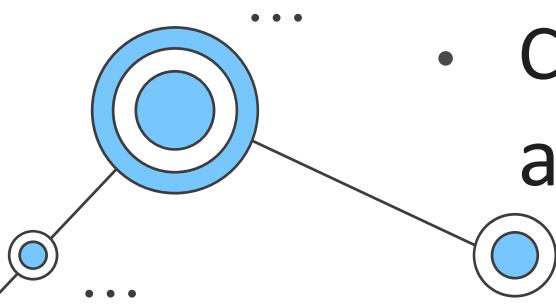


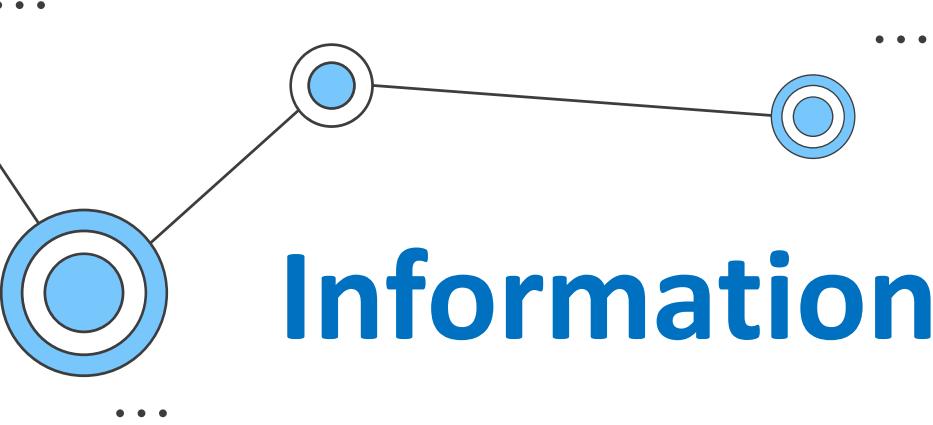


Informational Report

2. Progress/Status Report

- Provide information on the status of a project or service
- Identify what has been accomplished
- List any problems that have been encountered
- Outline what work still remains
- Conclude by providing an overview of the project's status and what should be done next.

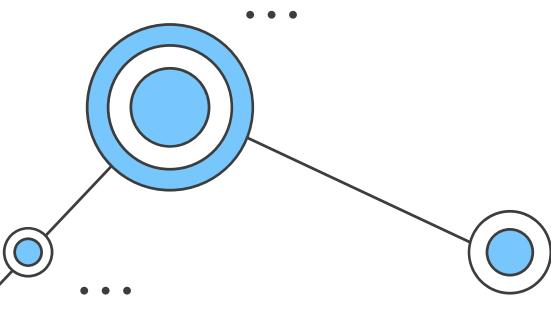


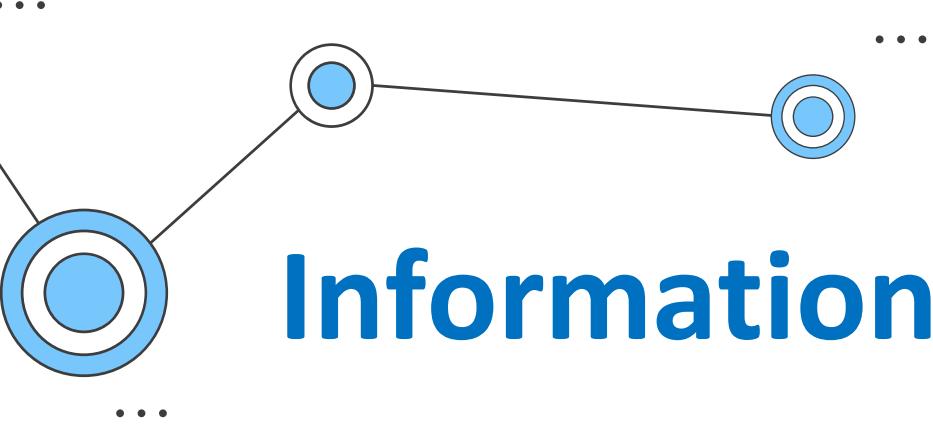


Informational Report

3. Compliance Report

Provide information to show regulators and authorities that the organization has **met the requirements** that were asked

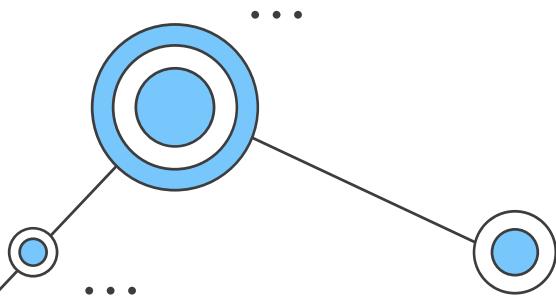


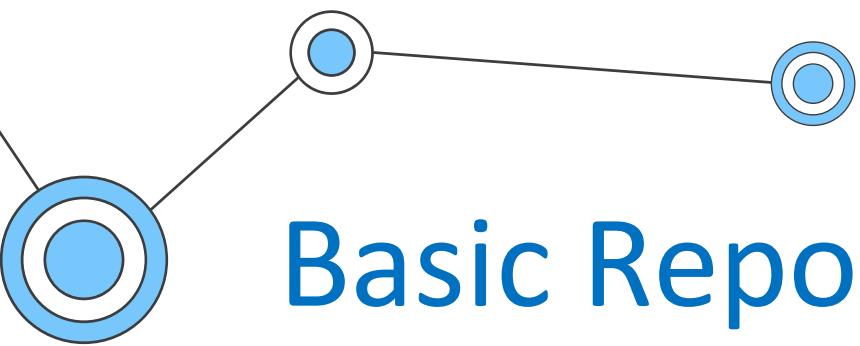


Informational Report

4. Policy/Procedural Report

They communicate organization **rules and guidelines**

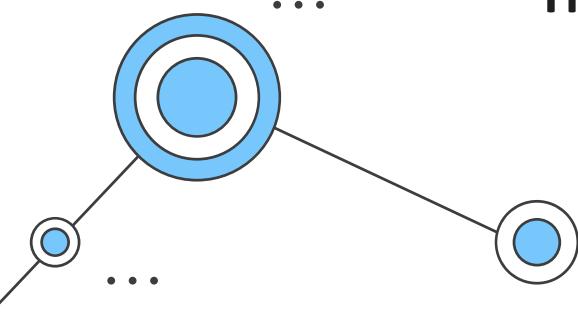
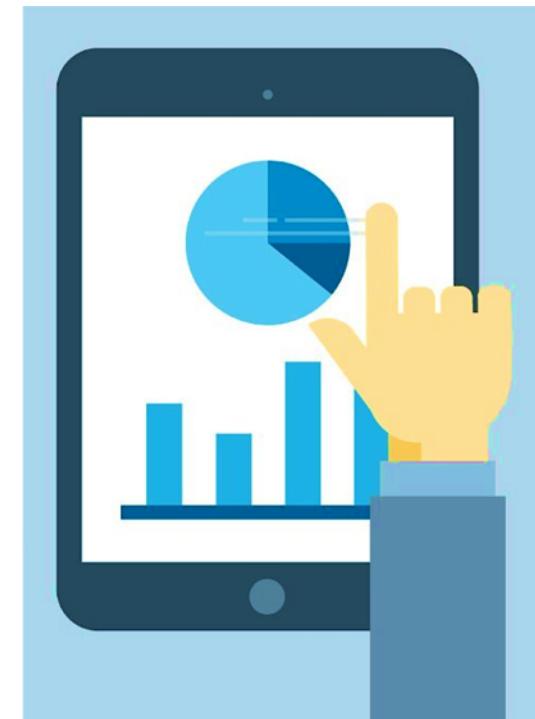


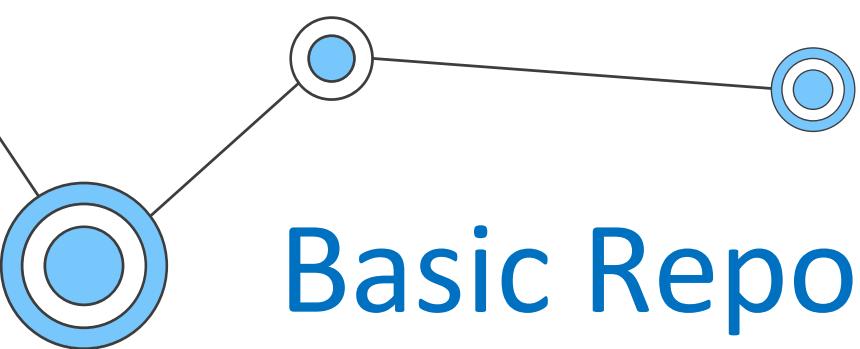


Basic Report Functions

Analytical Report

- Provide data or findings, analyses, and conclusions
- May also supply recommendations
- Intend to persuade readers





Basic Report Functions

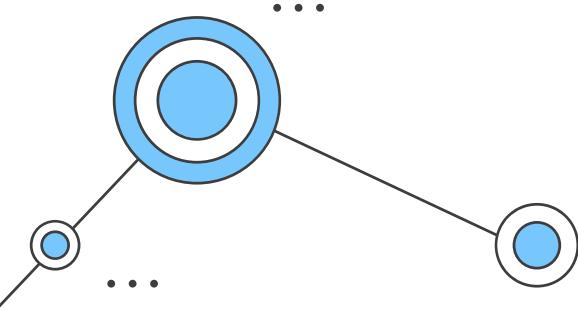
Analytical Report

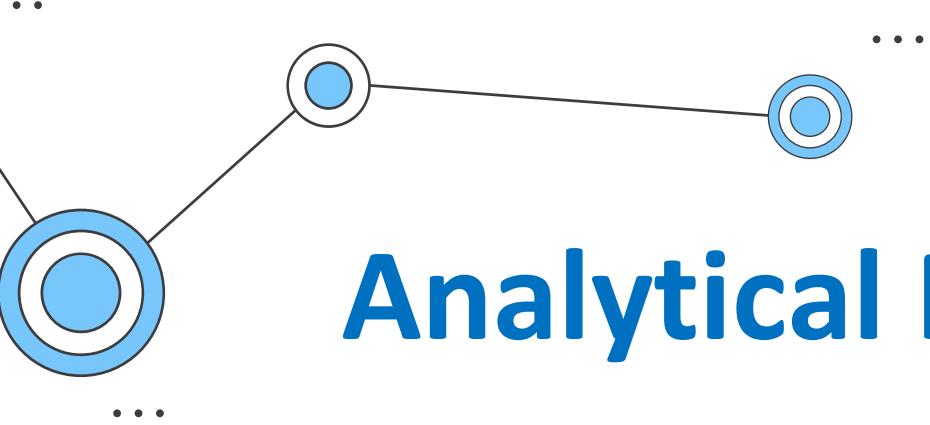
Examples:

1. Opportunity-based reports
2. Solution-based reports
3. Decision-based reports



<https://www.vectorstock.com/>

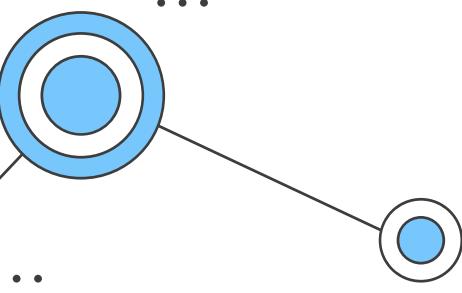


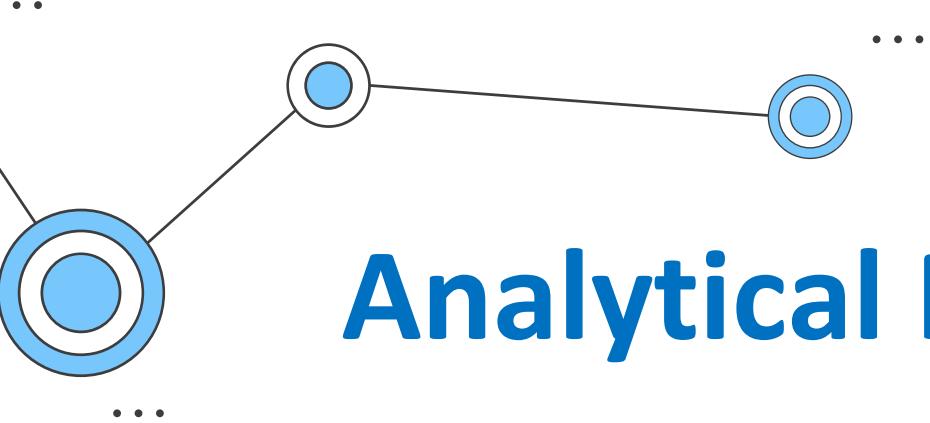


Analytical Report

1. Opportunity Reports

- Explain rewards and risks of selecting a course of action
- They are also called market analysis reports, or due diligence reports

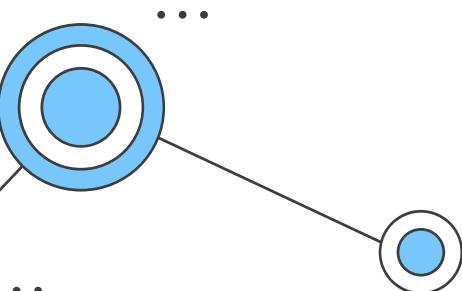


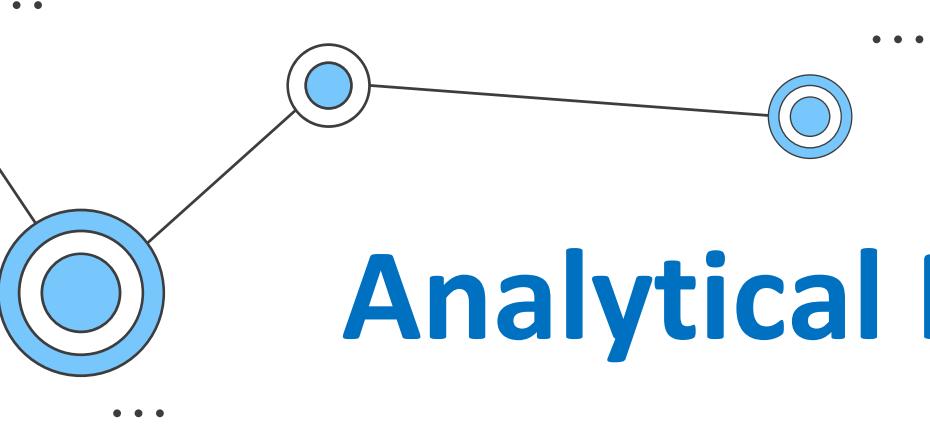


Analytical Report

2. Solution-based Reports

- Their purpose is to analyze a problem and offer viable solutions
- *Examples:*
 - Financial Analysis Reports
 - Trouble Shooting Reports

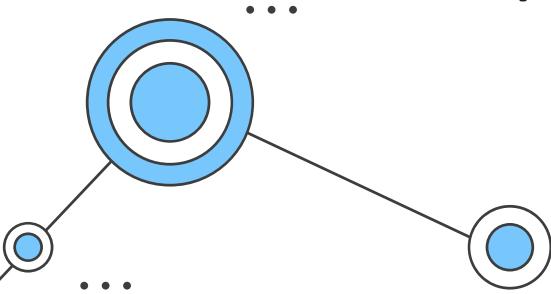




Analytical Report

3. Decision-based Reports

- Their purpose is to outline why a past or present decision was made
- Examples include feasibility reports and justification report



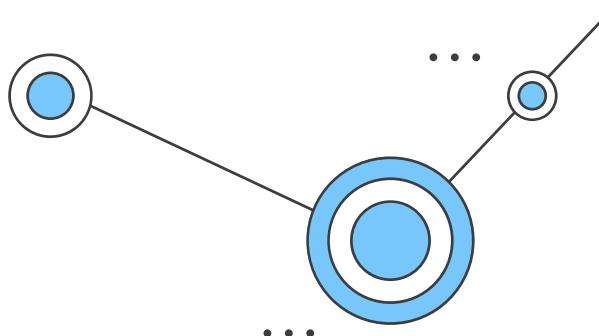
Organizational Strategies

- **Direct strategy**
- **Indirect strategy**

The reader's expectations and the content of a report determine its pattern of development



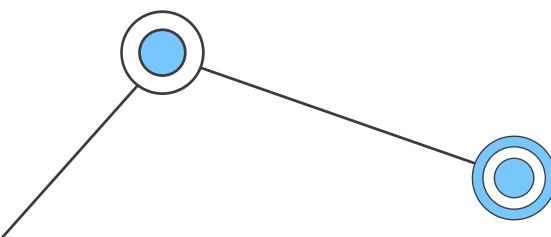
Organizational Strategies



Use Direct strategy

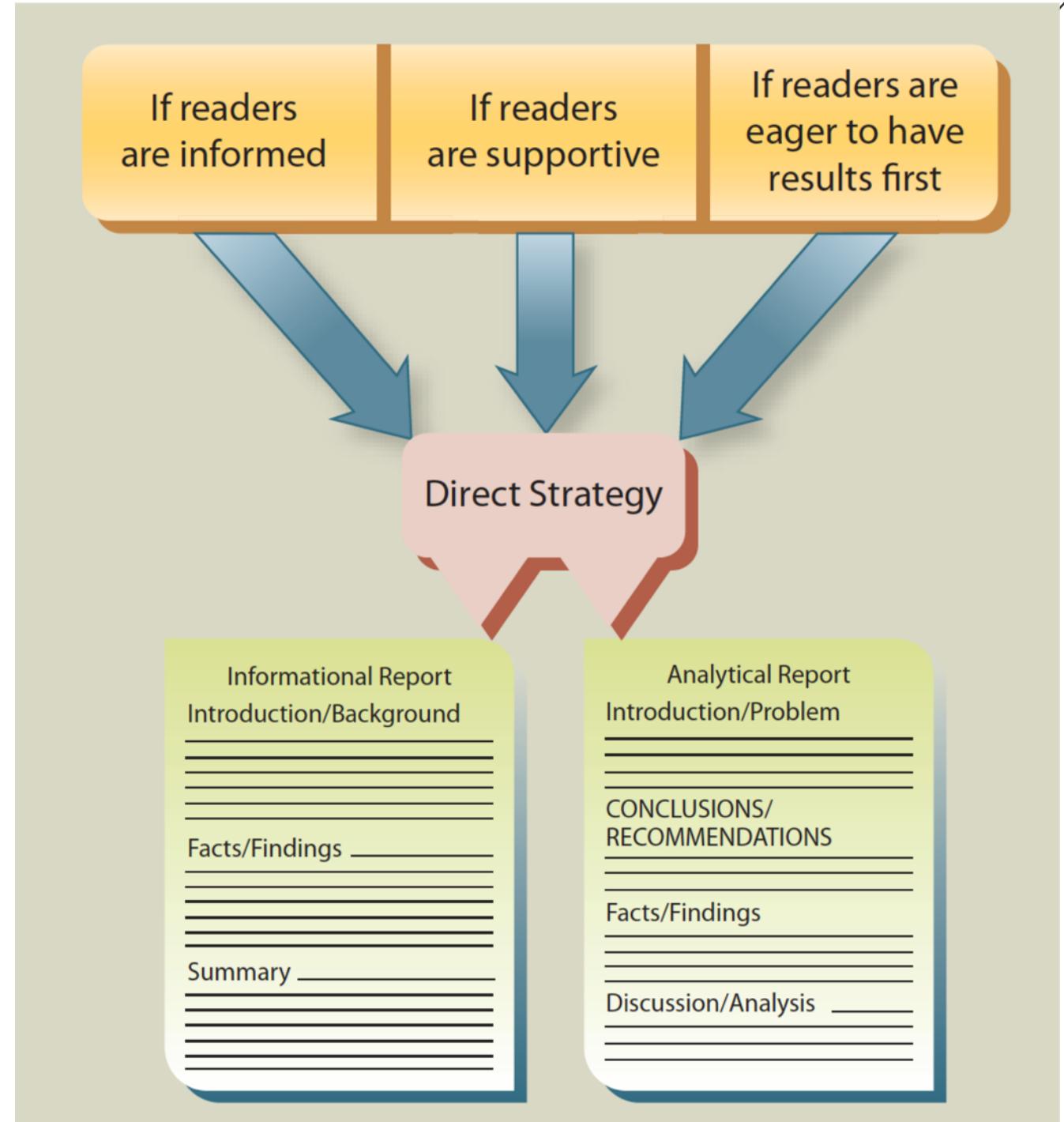
When readers

- are informed
- are supportive
- want results first

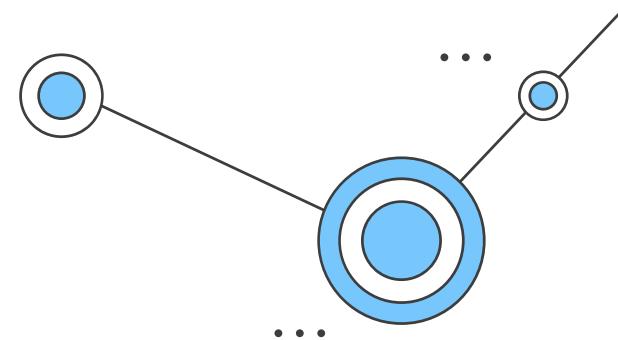


Organizational Strategies

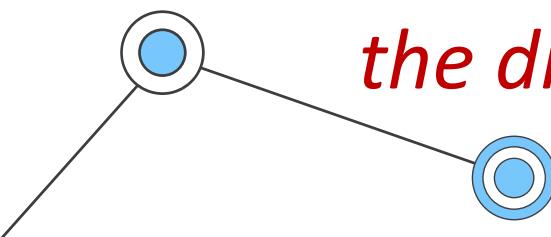
Direct Strategy



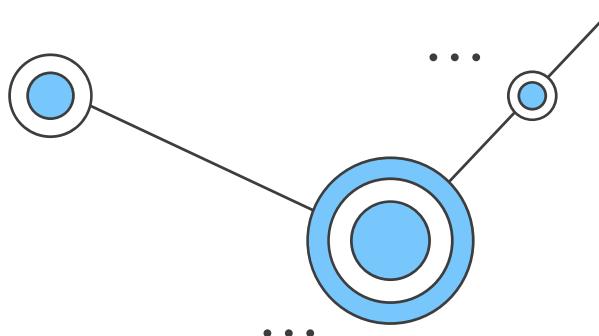
Organizational Strategies



- **Direct Pattern:** The purpose for writing is presented close to the beginning.
- **Informational reports**, such as the letter are usually arranged directly. They open with an introduction, which is followed by the facts and a summary
- *Unless readers are familiar with the topic, they may find the direct pattern confusing.*



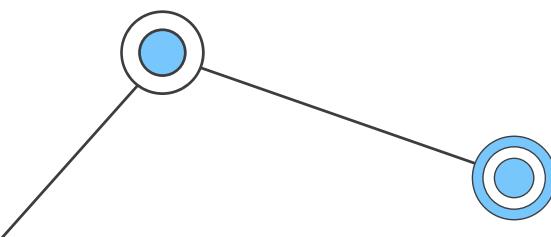
Organizational Strategies



Use Indirect strategy

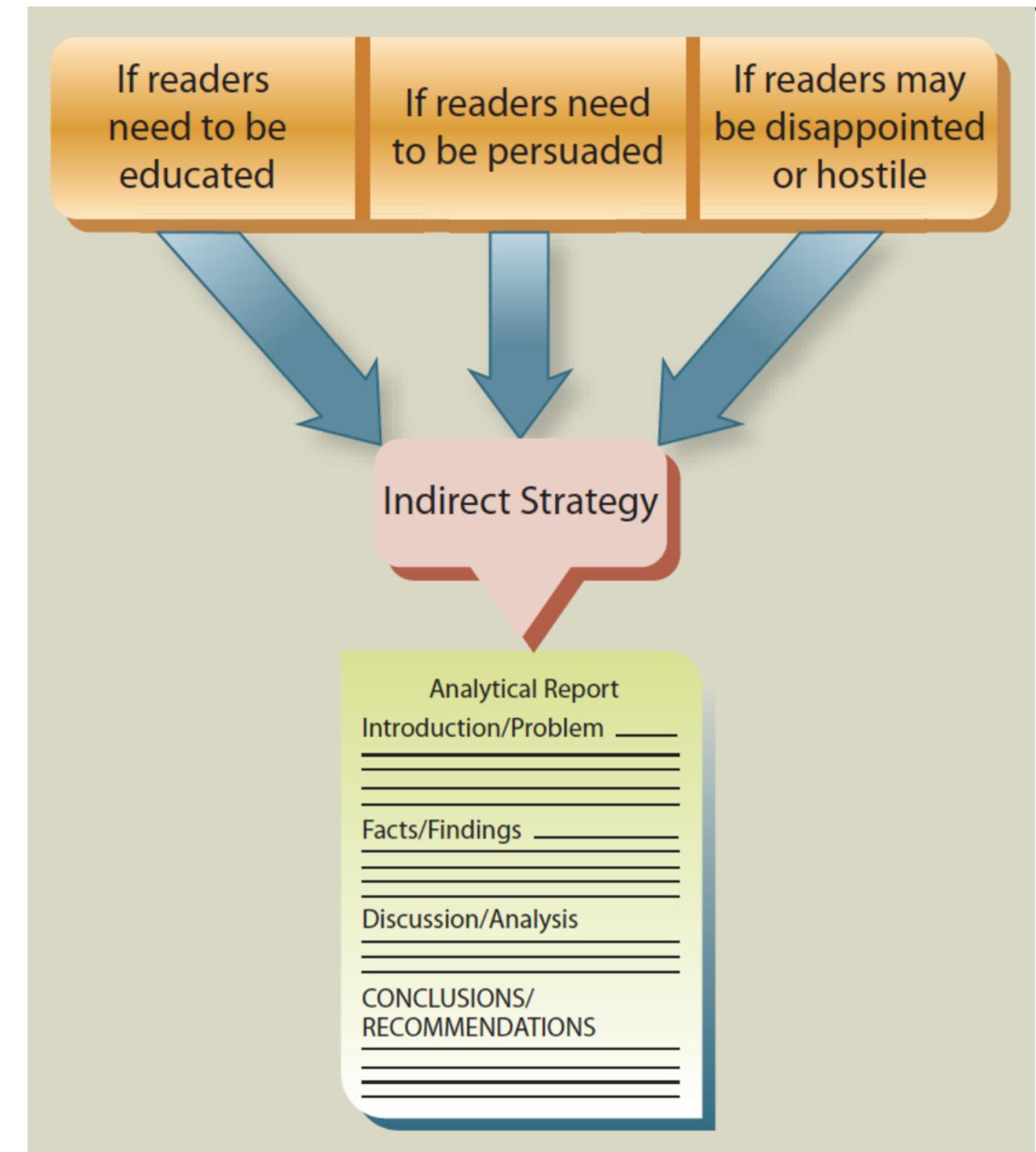
When readers

- need to be educated
- need to be persuaded
- may be disappointed or hostile

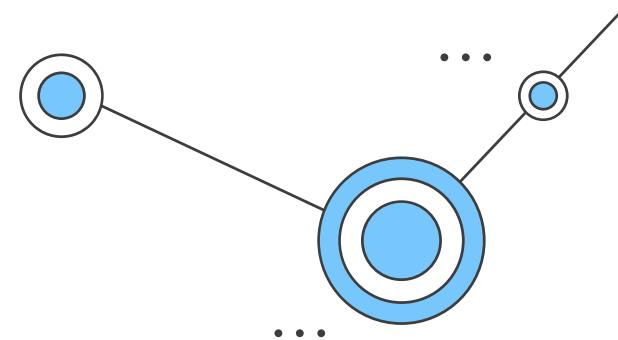


Organizational Strategies

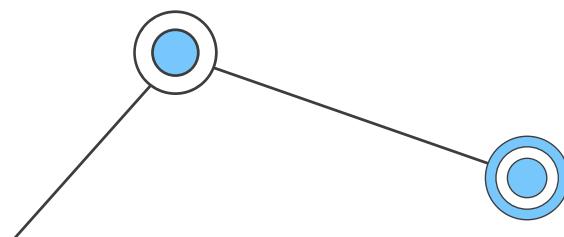
Indirect Strategy



Organizational Strategies



- **Analytical reports** may intend to persuade readers to act or change their beliefs.
- Many readers prefer the indirect pattern because it seems logical and mirrors the way they solve problems.
- **Indirect Pattern:** The conclusions and recommendations, if requested, appear at the end of the report



Typical Report Formats

- **Forms and templates**
- **Letter Format** (external)
- **Memo Format** (internal)
- Printed (longer and more formal reports)
- **Digital** (PDF files; Web-based multimedia reports)
- **Digital slide decks**



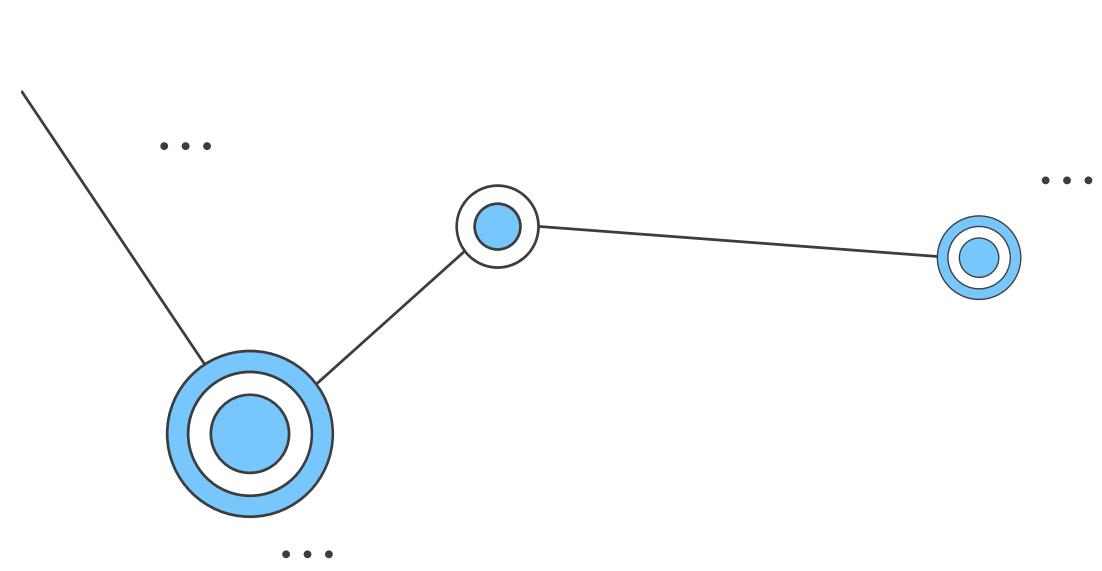
<https://www.vectorstock.com/>

Reports – E-Mail and Digital Formats

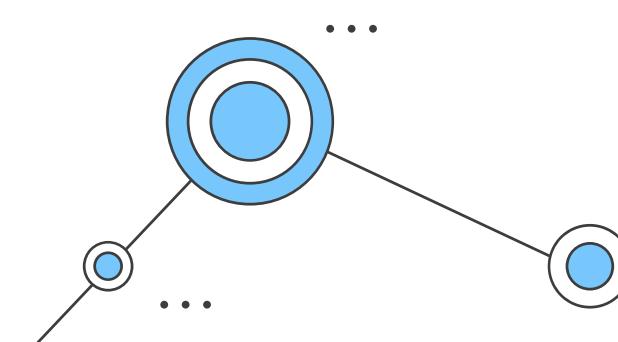
- PDF documents are a popular delivery format.
- Some reports are animated and may be hyperlinked to other content.
- **Slide decks** are a condensed image-rich format not intended for verbal delivery.



<https://www.vectorstock.com/>

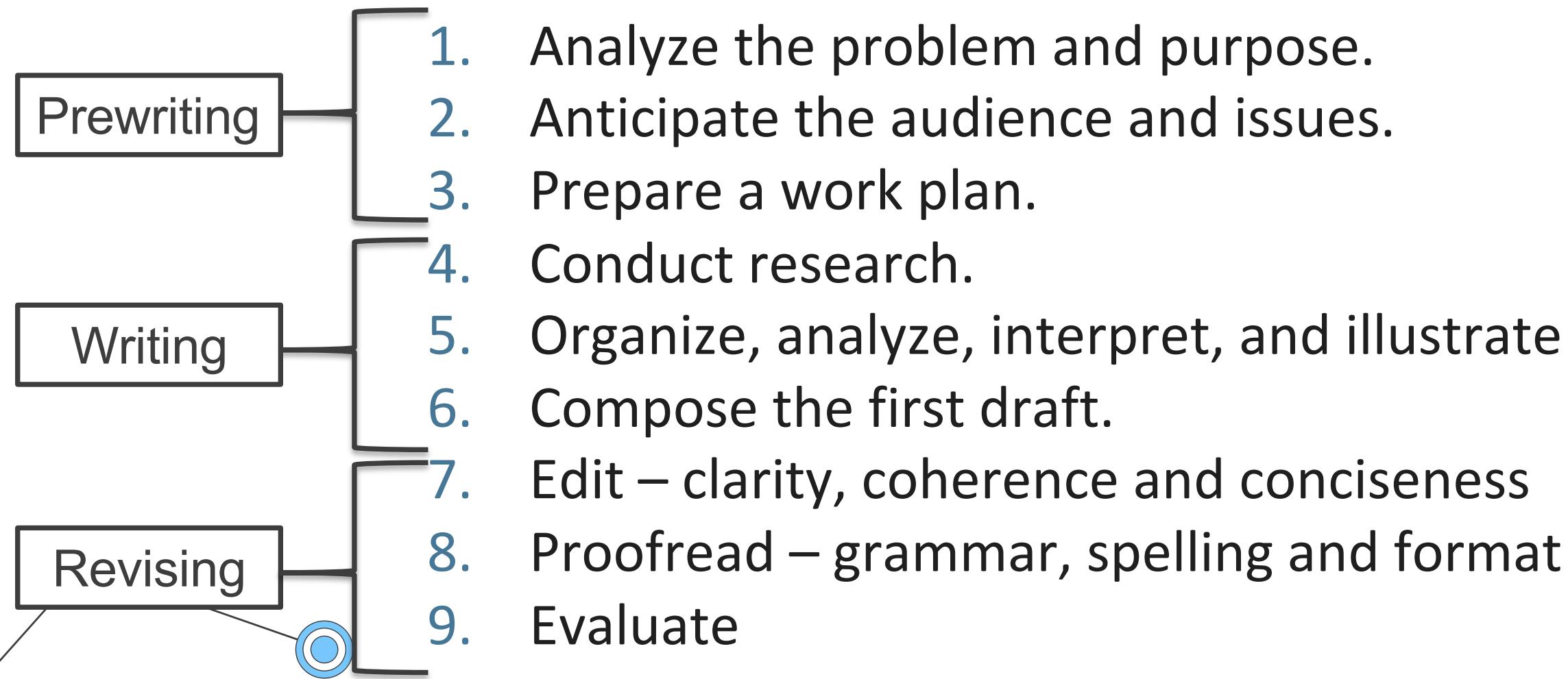
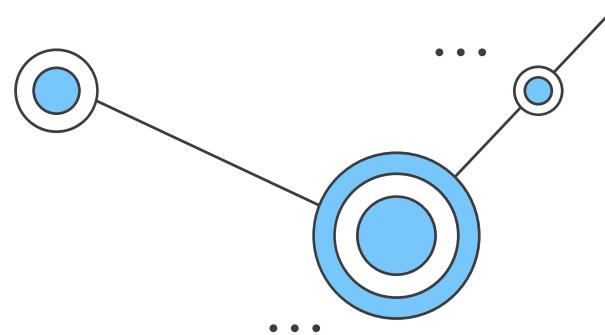


Learning Outcome 2

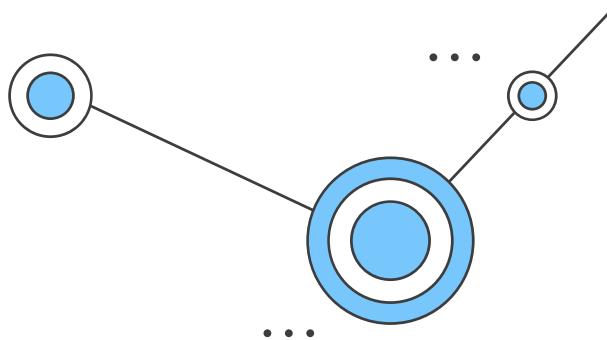


Apply the 3-x-3 writing process to contemporary business reports to create well-organized documents that show a firm grasp of audience and purpose.

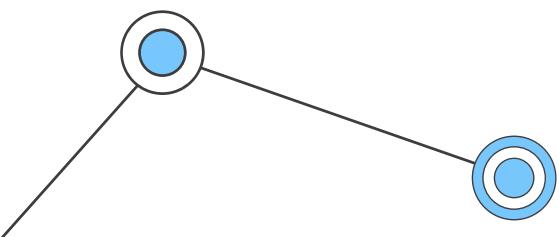
Applying the 3-x-3 Writing Process to Reports



Analyzing the Problem and Purpose



- The first step in writing a report is understanding the problem or assignment clearly.
- Prepare a written problem statement to clarify the task:
 - **Problem statement**
 - **Problem question**
 - **Statement of purpose**

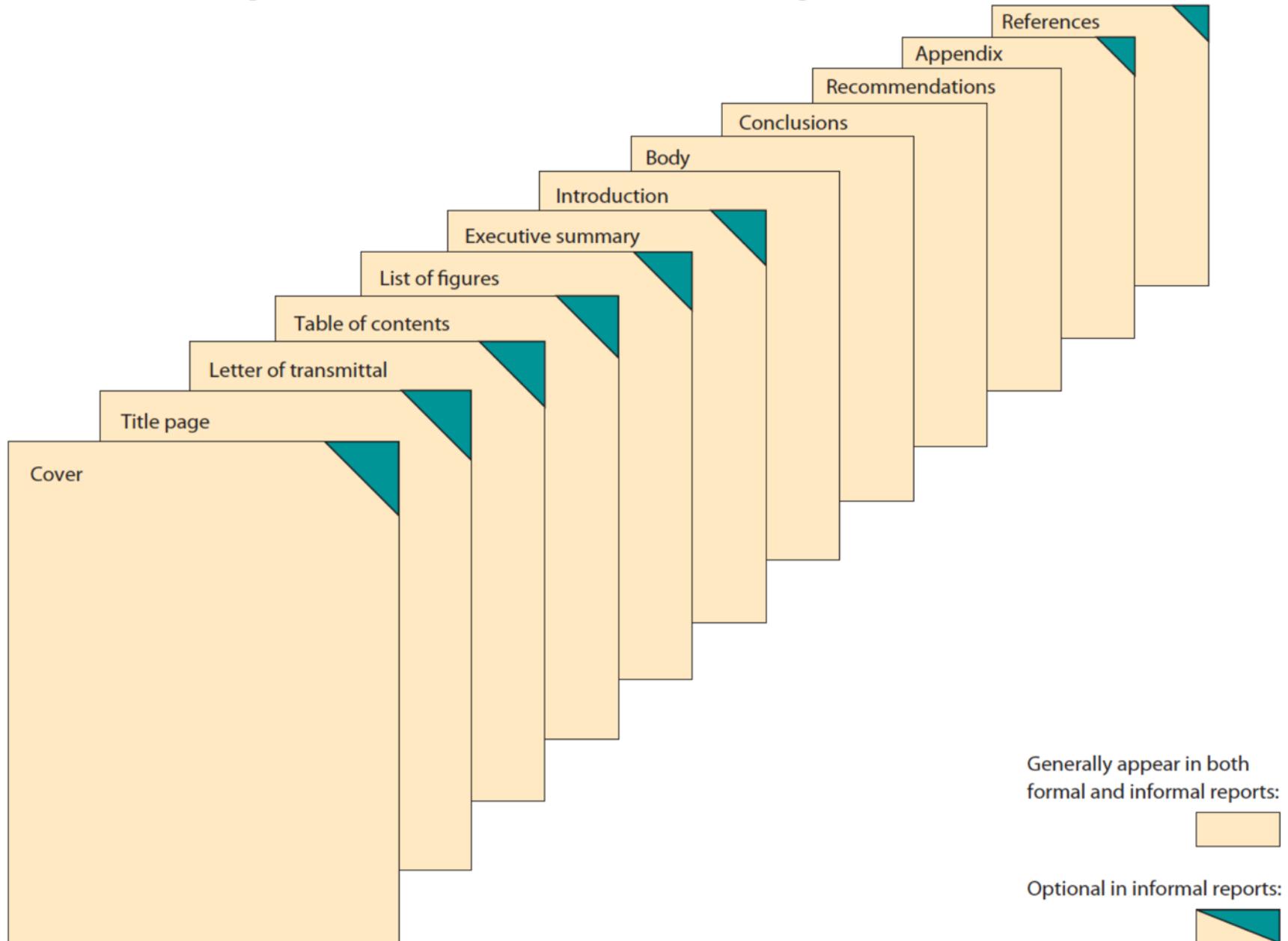


Analyzing the Problem and Purpose

- ***Problem statement:*** The leases on all company cars will be expiring in three months. Mycon must decide whether to renew them or develop a new policy regarding transportation for sales reps. Expenses and paperwork for employee-owned cars seem excessive.
- ***Problem question:*** What plan should Mycon follow in providing transportation for its sales reps?
- ***Statement of purpose:*** To recommend a plan that provides sales reps with cars to be used in their calls.

Components of Formal and Informal Reports

FIGURE 13.3 Components of Formal and Informal Reports



Formal Report - Cover and Title Page

- Choose a professional binder or cover for hard copies.
- Balance the following parts on the **title page**:
 - Name of the report in **bold**
 - Receiver's name, title, and organization
 - Author's name, title, and organization
 - Date submitted



Formal Report – Letter of Transmittal

- Announce the topic and explain who authorized it.
- Briefly describe the project.
- Highlight the findings, conclusions, and recommendations (if the receiver is supportive).
- Close with appreciation for the assignment, follow-up actions, acknowledgment of help from others, or offers of assistance in answering questions.



Formal Report – Table of Contents and Figures

Table of contents

- Show the page number where each report heading begins in the text. *Connect page numbers and headings with dots.*

List of illustrations

- Include tables, illustrations, or figures showing the title of each and its page number.
- Place the list on the same page with the table of contents if both are small.



Formal Report – Executive Summary

- **Look for strategic words and sentences.** Read the completed report carefully.
- **Prepare an outline with headings.** Include headings for the purpose, findings, and conclusions/ recommendations. Summarize the research methods, if stated concisely.
- **Fill in your outline.** Cut and paste important parts of the text. Then condense with careful editing. Or create new sentences as you prepare the executive summary.



Formal Report – Executive Summary

To prepare an executive summary:

- Follow the report sequence.
- Eliminate nonessential details.
- Control the length, no more than 10 percent of the original document.

Begin with the purpose:

The purpose of this report is to...



Formal Report - Introduction

- Explain the problem motivating the report
- Describe the problem's background and significance.
- Clarify the scope and limitations of the report
- Consider reviewing relevant literature.
- Consider describing data sources, methods, and key terms.
- Close by previewing the report's organization.



Formal Report - Body

- Discuss, analyze, and interpret the research **findings** or proposed solution to the problem
- Arrange the findings in logical segments that follow your outline.
- Use clear, descriptive headings.



Formal Report – Conclusions and Recommendations

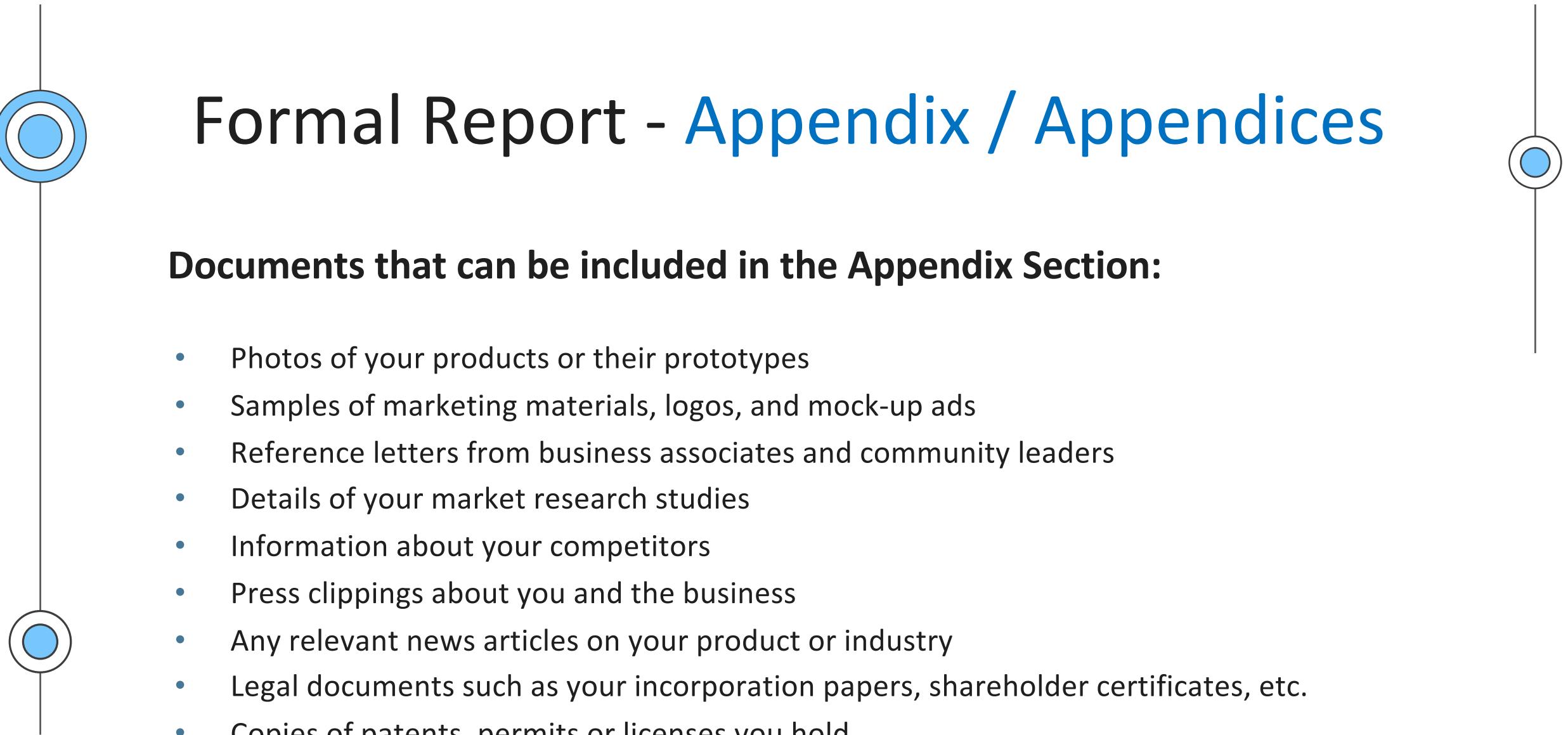
- Explain what the findings mean in relation to the problem.
- Make enumerated recommendations, if requested.
- Suggest actions for solving the problem.



Formal Report – Appendix / Appendices

- Include incidental or supporting materials not relevant to all readers.
- Include such items as survey forms, copies of other reports, tables, large graphics, and correspondence.
- Multiple appendixes are named
 - Appendix A
 - Appendix B
 - Appendix C
 - ...*so on...*





Formal Report - Appendix / Appendices

Documents that can be included in the Appendix Section:

- Photos of your products or their prototypes
- Samples of marketing materials, logos, and mock-up ads
- Reference letters from business associates and community leaders
- Details of your market research studies
- Information about your competitors
- Press clippings about you and the business
- Any relevant news articles on your product or industry
- Legal documents such as your incorporation papers, shareholder certificates, etc.
- Copies of patents, permits or licenses you hold
- Copies of your property and equipment leases or rental agreements
- Contracts for current or future work
- Spreadsheets and documentation for financial projections

Formal Report - References

- List all references in References (**APA Style**).
- Include author, publication date, title, publication, page number — *all significant data for ideas, paraphrase or quotations used in your report.*

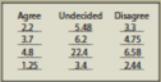
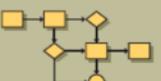


Illustrating Report Data

Graphics

- To clarify data
- To create visual interest
- To condense and simplify data
- To make numerical data meaningful

FIGURE 11.11 Matching Graphics to Objectives

Graphic	Objective																				
Table	 <table border="1"><thead><tr><th></th><th>Agree</th><th>Undecided</th><th>Disagree</th></tr></thead><tbody><tr><td>2.2</td><td>5.48</td><td>3.1</td><td></td></tr><tr><td>3.7</td><td>6.2</td><td>4.75</td><td></td></tr><tr><td>4.8</td><td>22.4</td><td>6.58</td><td></td></tr><tr><td>1.25</td><td>3.4</td><td>2.64</td><td></td></tr></tbody></table> <p>To show exact figures and values</p>		Agree	Undecided	Disagree	2.2	5.48	3.1		3.7	6.2	4.75		4.8	22.4	6.58		1.25	3.4	2.64	
	Agree	Undecided	Disagree																		
2.2	5.48	3.1																			
3.7	6.2	4.75																			
4.8	22.4	6.58																			
1.25	3.4	2.64																			
Bar chart																					
Line chart																					
Pie chart																					
Flowchart																					
Organization chart																					
Photograph, map, illustration																					

Illustrating Report Data

Tables

- Show exact figures and values
- Tables permit the systematic presentation of large amounts of data, whereas charts and graphs enhance visual comparisons.

FIGURE 11.12 Table Summarizing Precise Data

Figure 1 MPM ENTERTAINMENT COMPANY Income by Division (in millions of dollars)				
	Theme Parks	Motion Pictures	DVDs & Videos	Total
2008	\$15.8	\$39.3	\$11.2	\$66.3
2009	18.1	17.5	15.3	50.9
2010	23.8	21.1	22.7	67.6
2011	32.2	22.0	24.3	78.5
2012 (projected)	35.1	21.0	26.1	82.2

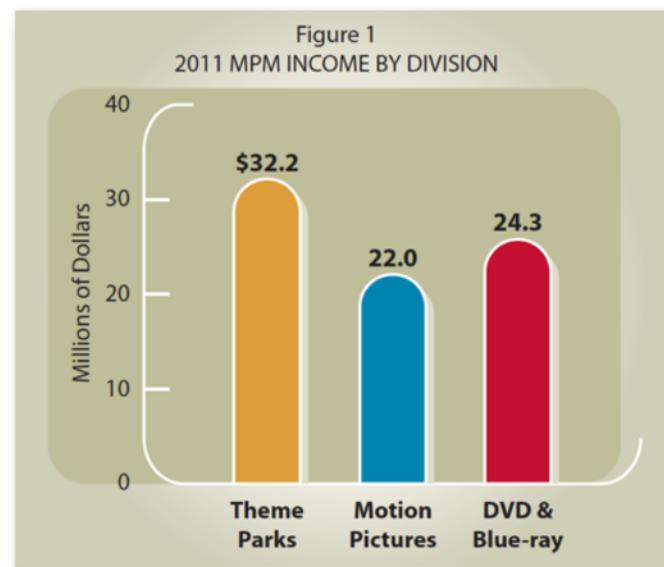
Source: *Industry Profiles* (New York: DataPro, 2011) 225.

Illustrating Report Data

Bar chart

- To compare one item with others
- Enable an emphatic visual comparison
- Useful to compare related items, illustrate changes in data over time, and show segments

FIGURE 11.13 Vertical Bar Chart



Source: *Industry Profiles*(New York: DataPro, 2011), 225.

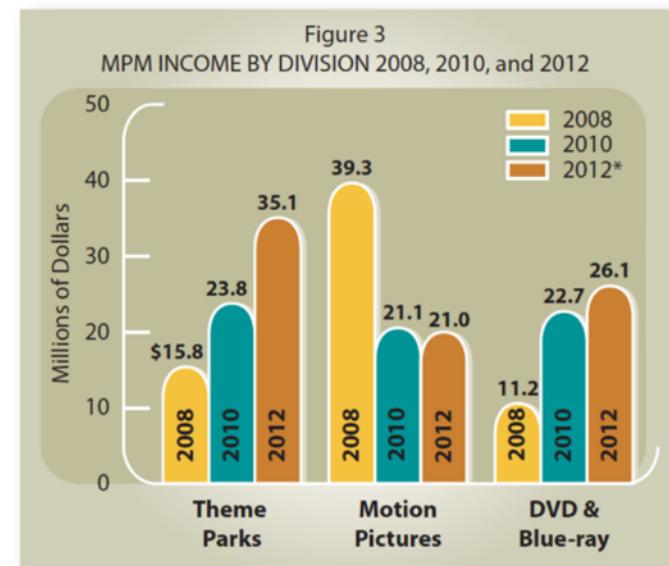
FIGURE 11.14 Horizontal Bar Chart



*Projected

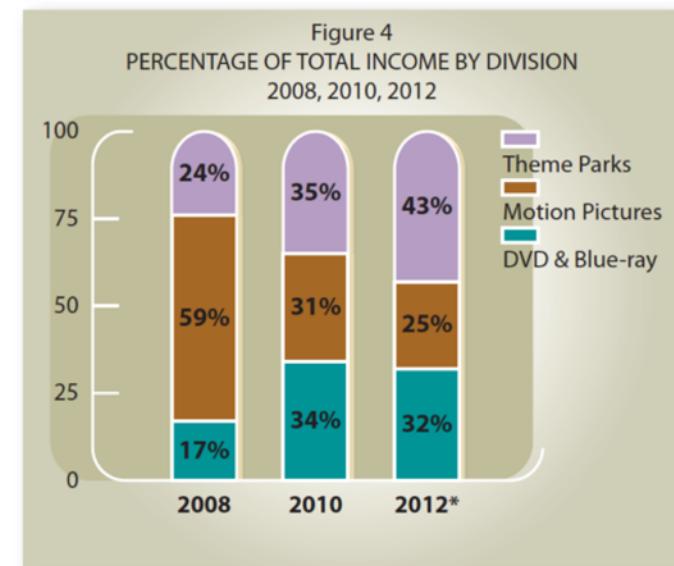
Source: *Industry Profiles*(New York: DataPro, 2011), 225.

FIGURE 11.15 Grouped Bar Chart



*Projected
Source: *Industry Profiles*

FIGURE 11.16 Segmented 100 Percent Bar Chart



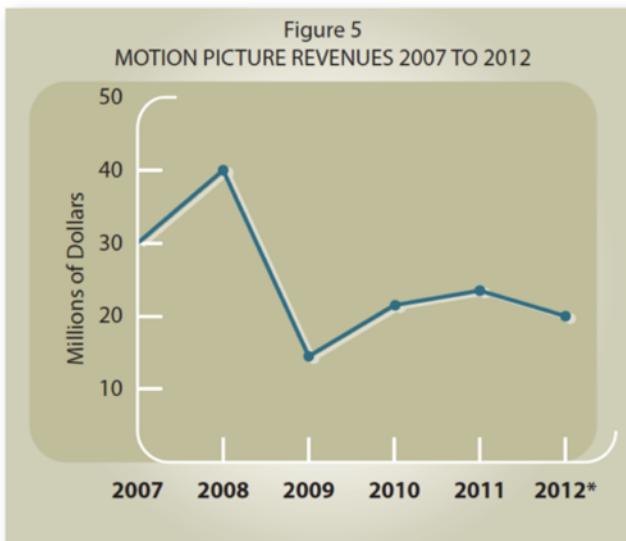
*Projected
Source: *Industry Profiles*

Illustrating Report Data

Line Chart

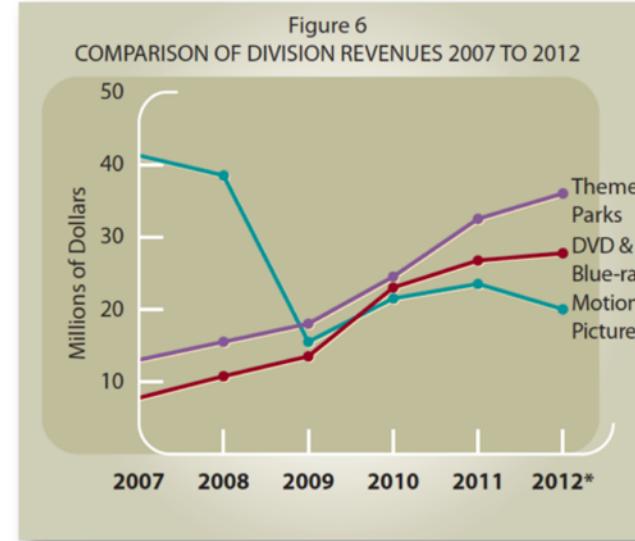
- To demonstrate changes in quantitative data over time
- Line charts is that they show changes over time, thus indicating trends.

FIGURE 11.17 Simple Line Chart



*Projected
Source: *Industry Profiles*

FIGURE 11.18 Multiple Line Chart



*Projected
Source: *Industry Profiles*

FIGURE 11.19 Segmented Line (Area) Chart



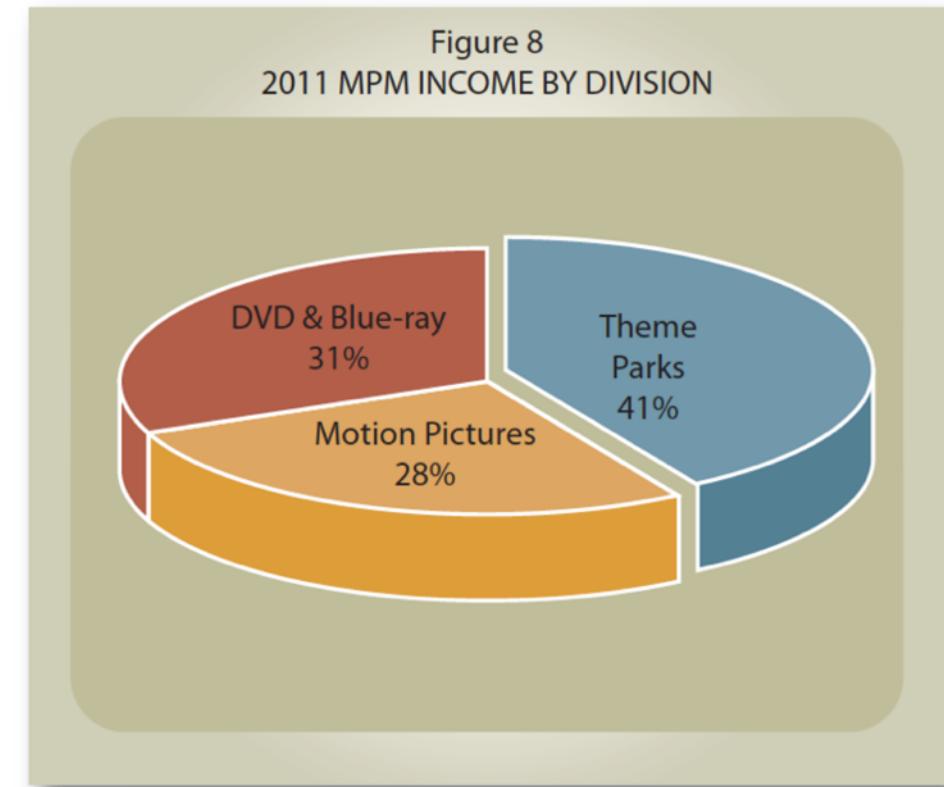
*Projected

Illustrating Report Data

Pie Chart

- To visualize a whole unit and the proportion of its components
- Effective in showing percentages or proportions of the whole

FIGURE 11.20 Pie Chart



Source: *Industry Profiles*

Illustrating Report Data

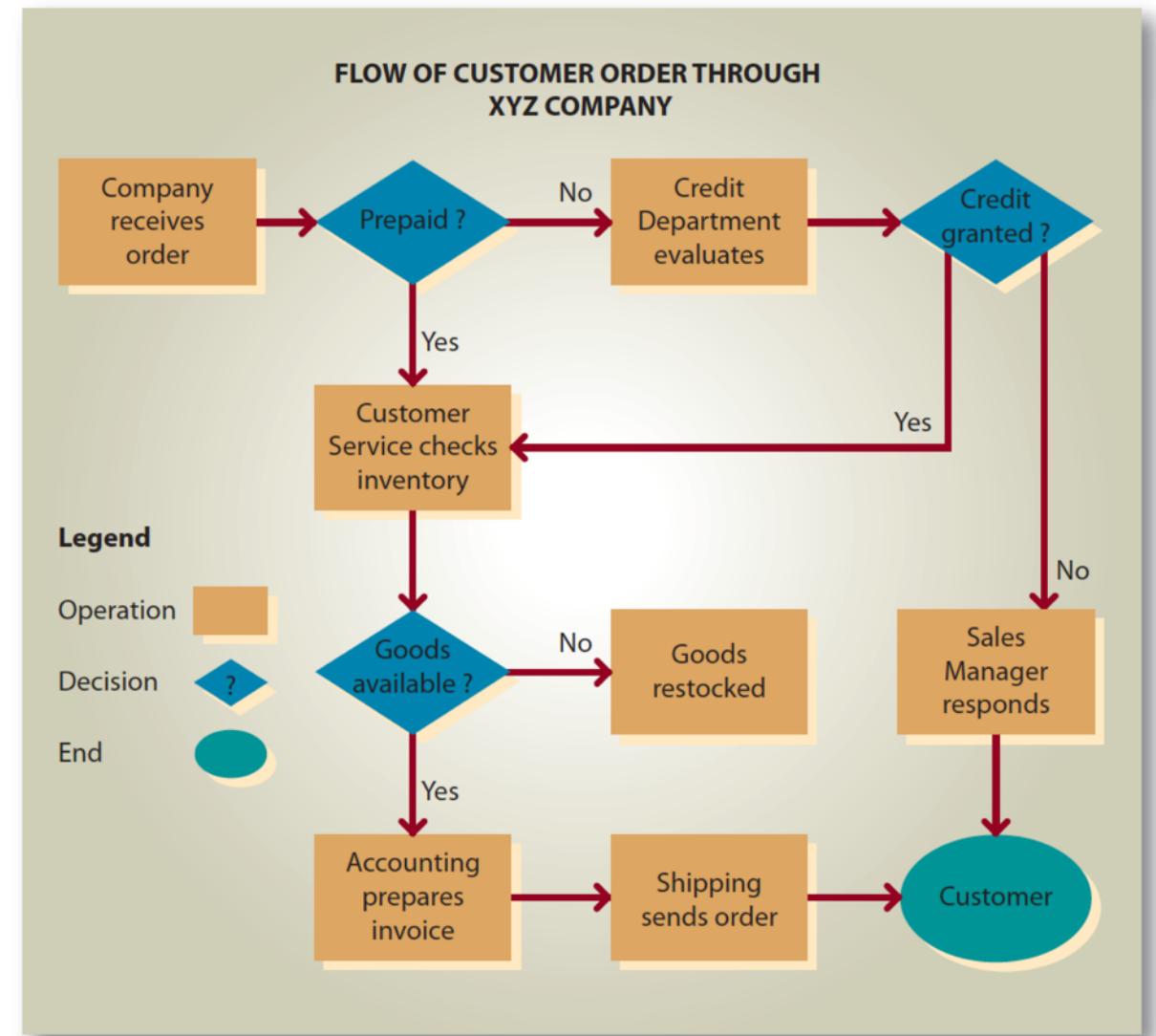
Flowchart

- To display a process or procedure

Organization Chart

- To define a hierarchy of elements

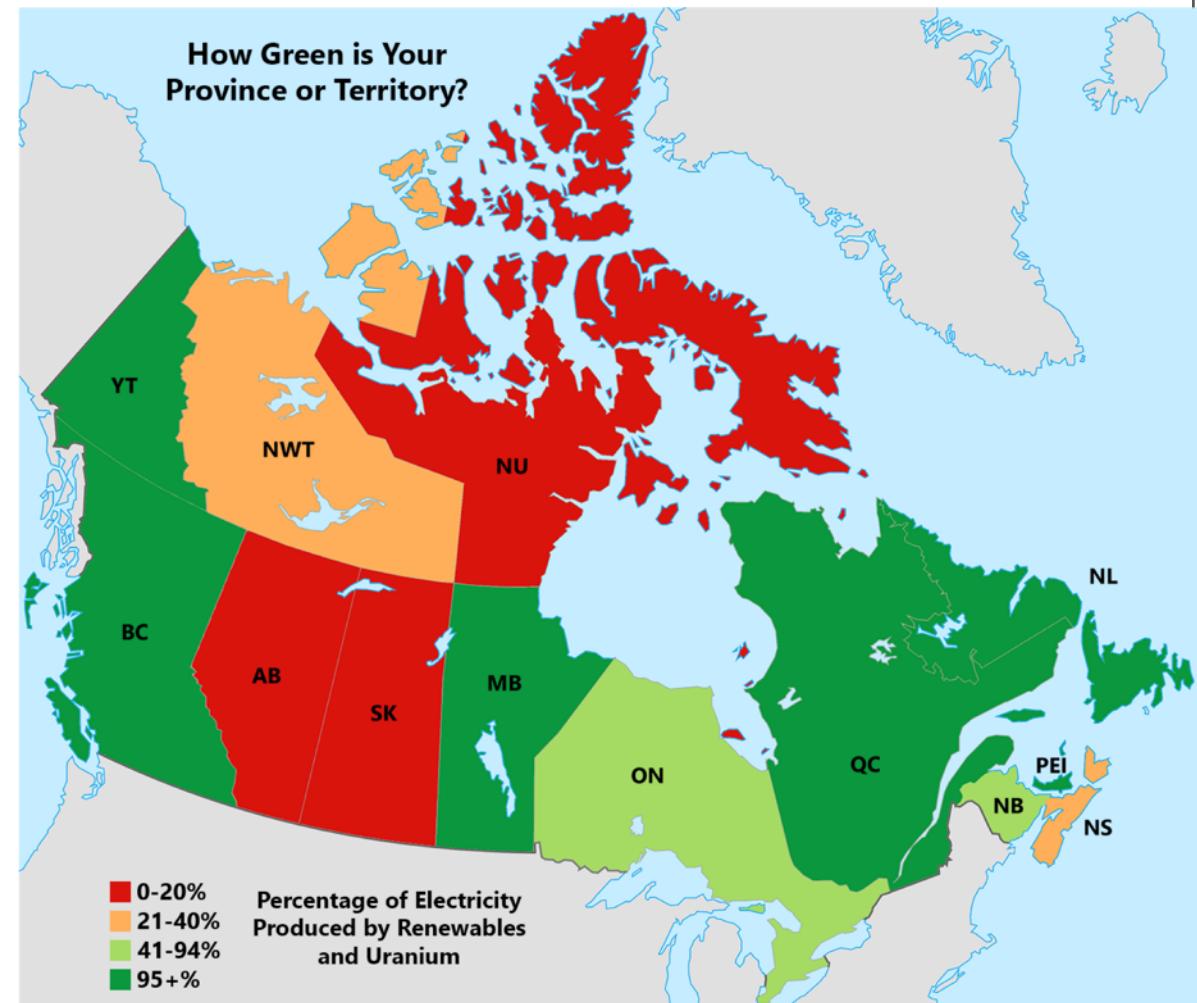
FIGURE 11.21 Flowchart

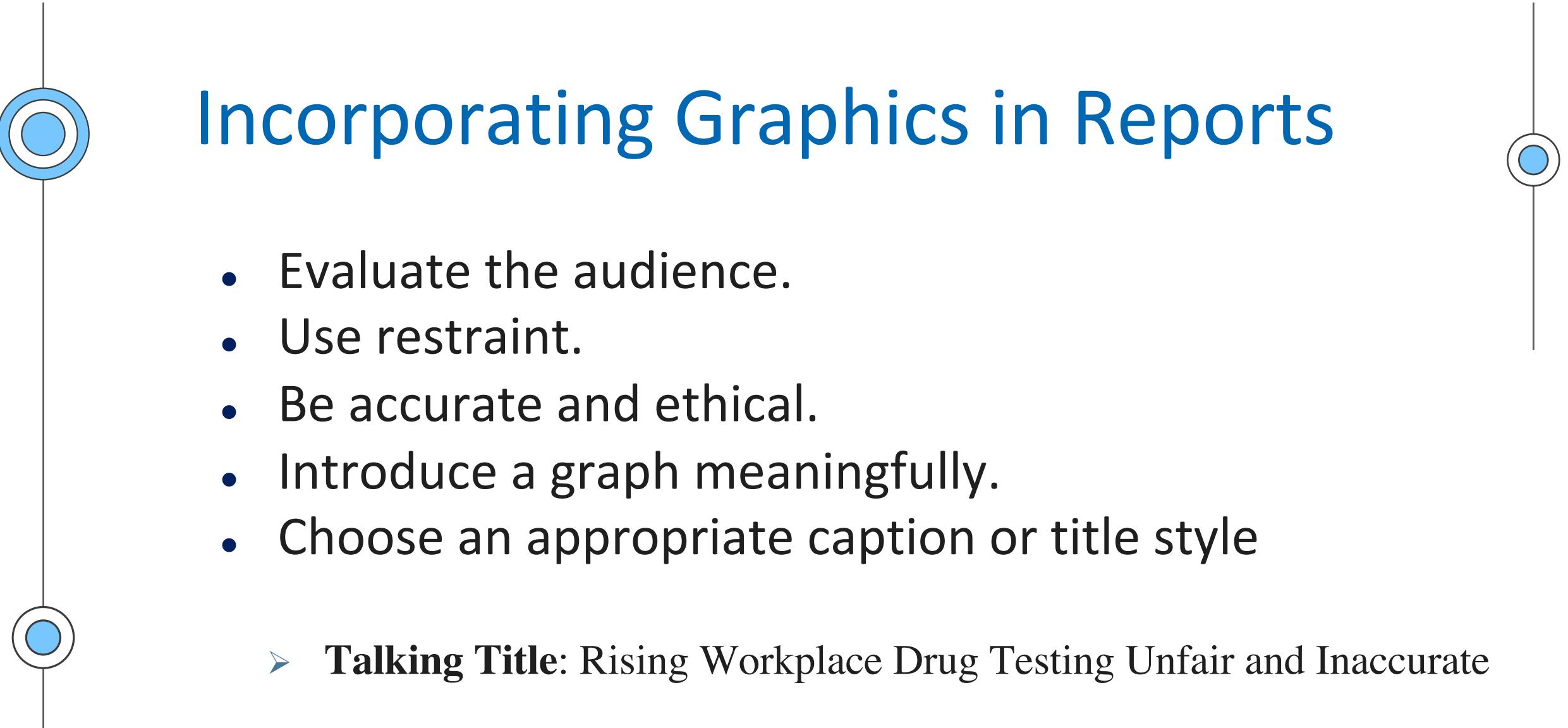


Illustrating Report Data

Photograph, maps and illustrations

To create authenticity, to spotlight a location, and to show an item in use





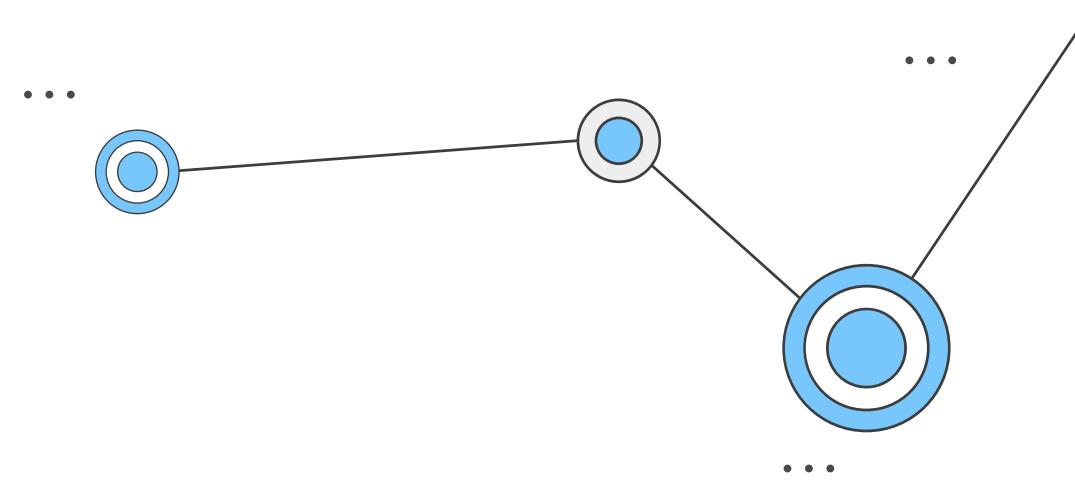
Incorporating Graphics in Reports

- Evaluate the audience.
- Use restraint.
- Be accurate and ethical.
- Introduce a graph meaningfully.
- Choose an appropriate caption or title style
 - **Talking Title:** Rising Workplace Drug Testing Unfair and Inaccurate
 - **Descriptive Title:** Workplace Drug Testing Up 277 Percent Since 1987

Report Format Guidelines

- **Font Size:** 12 point
- **Font Style:** (Sans Serif) Arial, Calibri, Helvetica, etc.
- **Line spacing:** Single space
- **Margin:** Minimum one inch margin on all sides
- **Organization:** Use headings and subheadings to divided content
- **White Space:** Separate paragraphs with white space
- Use **visuals** (charts, graphs or diagrams) to explain, especially for numbers
- **Alignment:** Align copy to the left

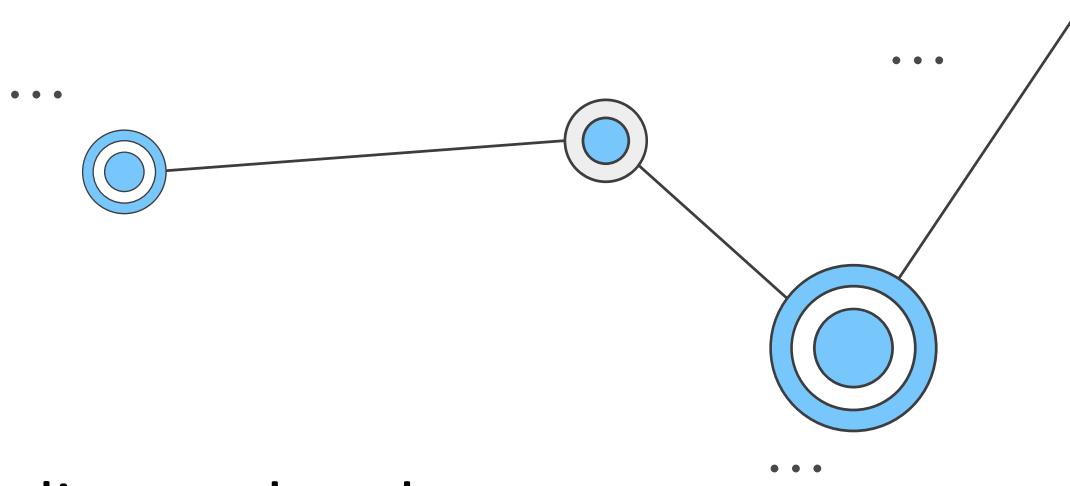
Review

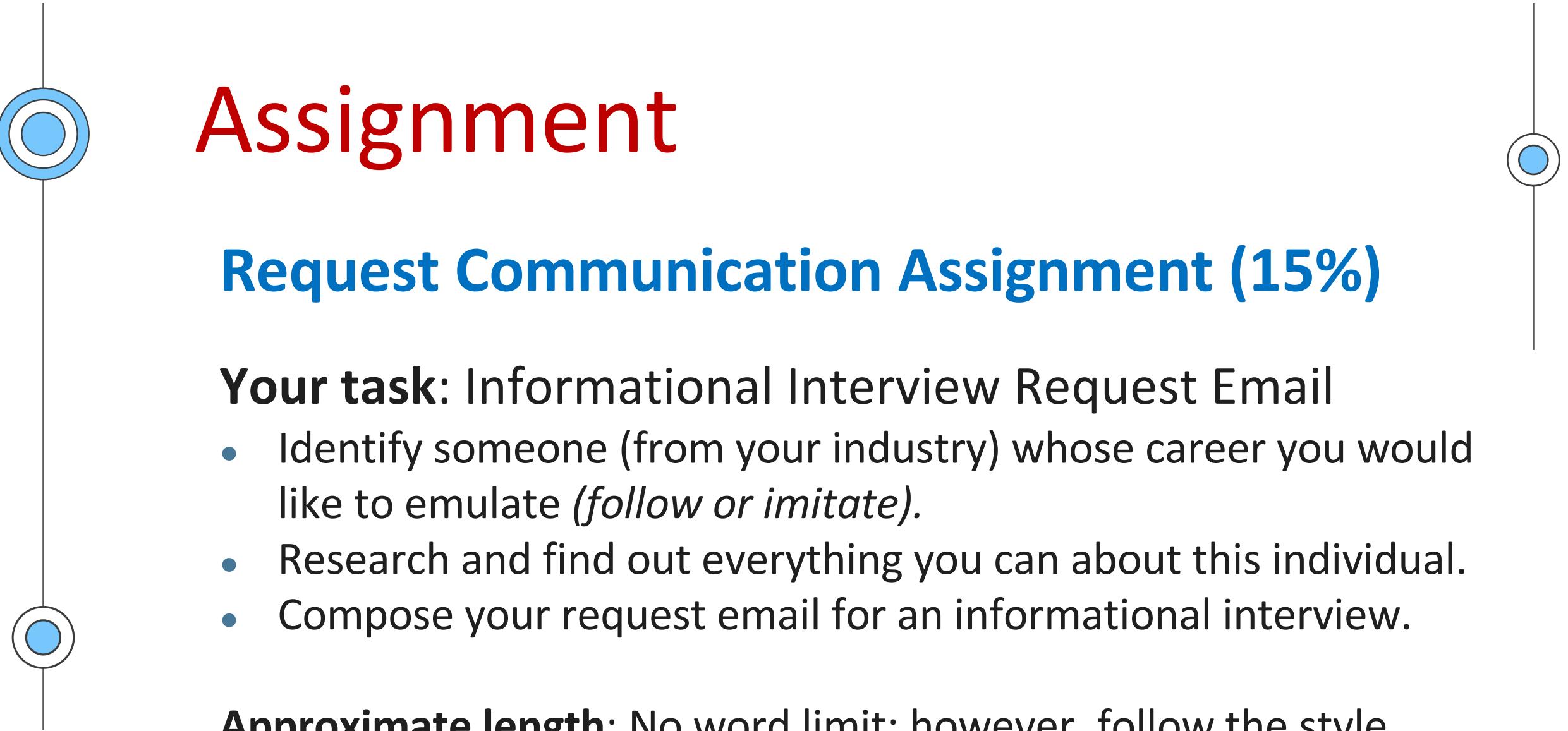


- What's the difference between an informational report versus an analytical report?
- Give an example of an informational report
- Give an example of an analytical report
- What is the typical structure of an informational report?
- What is the typical structure of an analytical report?
- List the four types of common report formats
- Name the two types of proposals and explain the difference between them

Source

"Communication @ Work" by Jordan Smith is licensed under
CC BY 4.0





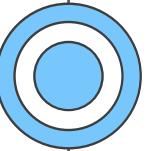
Assignment

Request Communication Assignment (15%)

Your task: Informational Interview Request Email

- Identify someone (from your industry) whose career you would like to emulate (*follow or imitate*).
- Research and find out everything you can about this individual.
- Compose your request email for an informational interview.

Approximate length: No word limit; however, follow the style, format, length, and tone of a formal email.



Assignment



Request Communication Assignment (15%)

- Read the instructions in the Assignment folder
- Pay careful attention to the tips
- Use the Email template



Worth: 15%

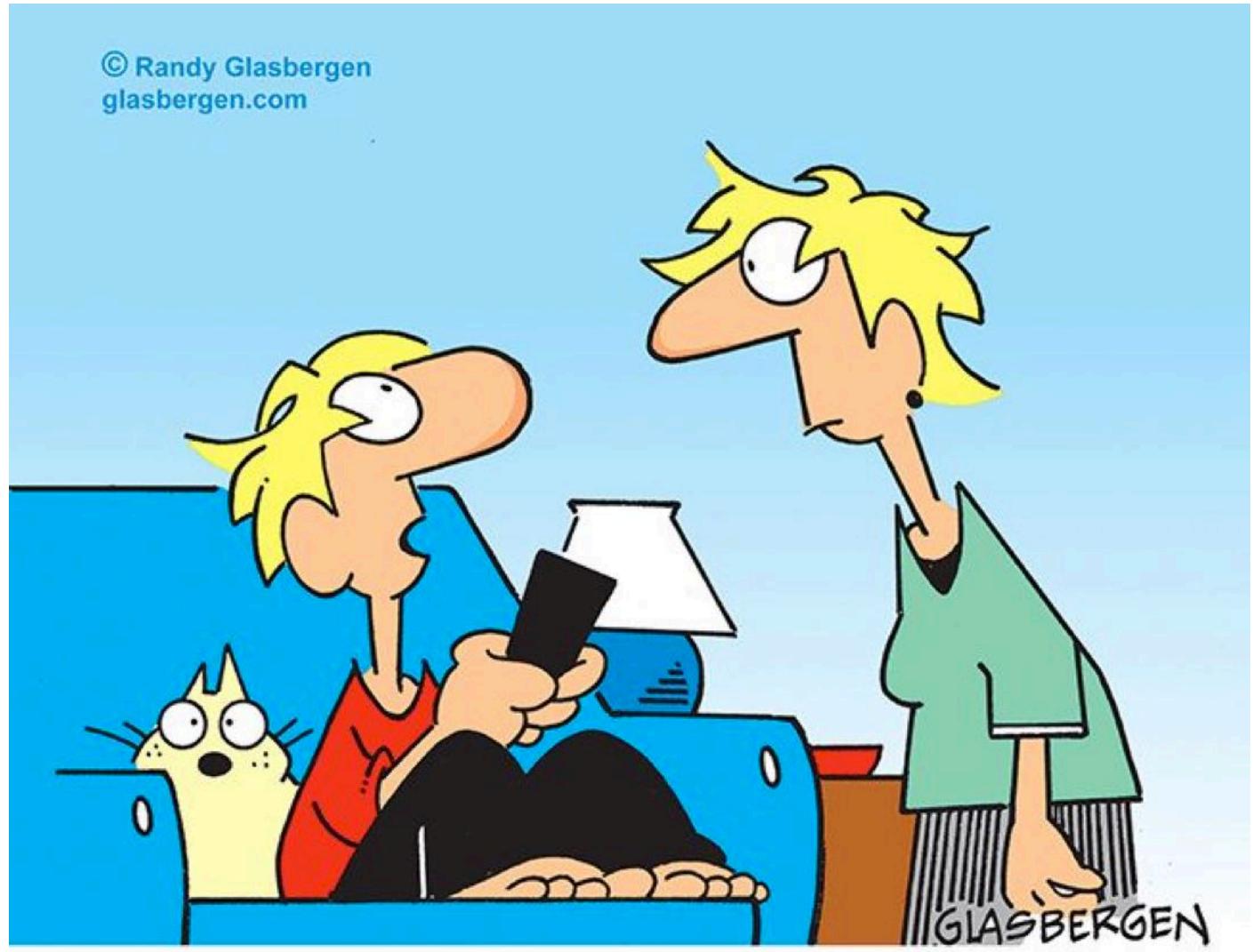
Due: June 28, 2022

Announcement

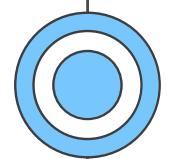
(June 27 – July 1)

Study Week

No classes
next week!



**“My teacher told me to read for an hour a day.
Do Facebook and text messages count?”**

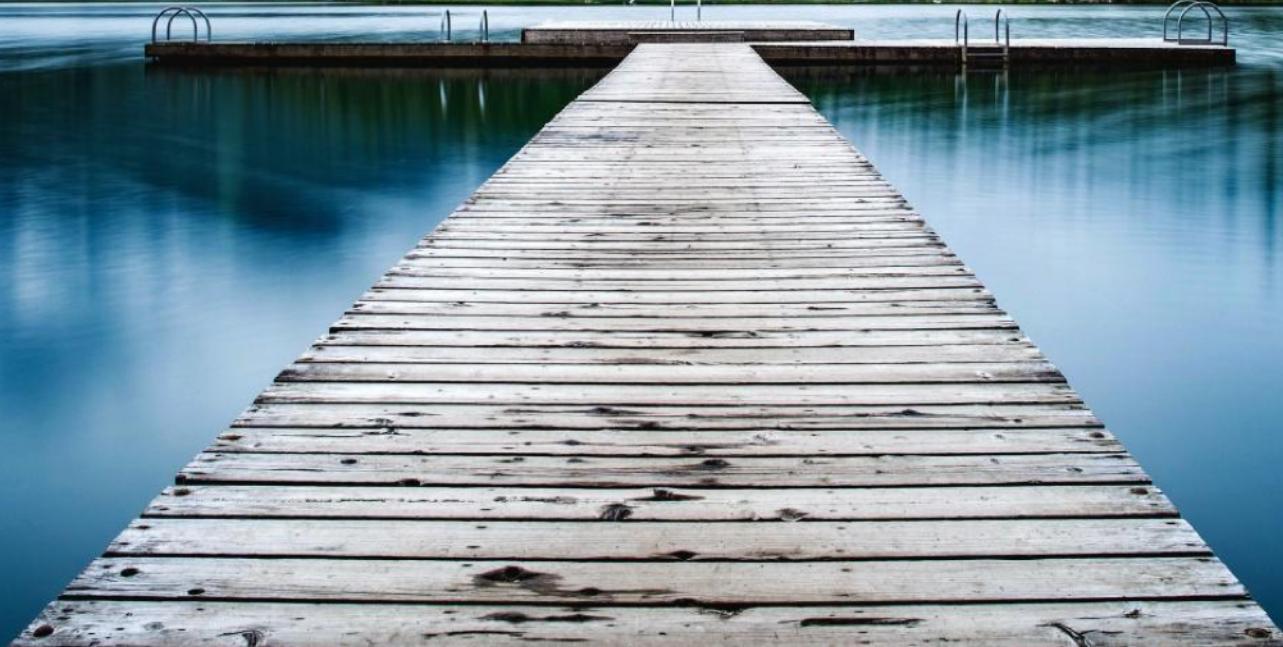


Weekly Inspiration



“Don’t say you don’t have enough time. You have exactly the same number of hours per day that were given to Helen Keller, Pasteur, Michaelangelo, Mother Teresa, Leonardo da Vinci, Thomas Jefferson, and Albert Einstein.”

— JACKSON BROWN JR.



A Canadian flag is flying from a pole on the left side of the image. The flag is partially visible, showing its red, white, and blue colors and the red maple leaf in the center. The background consists of a range of mountains with snow-capped peaks and green forests at the base. The sky is clear and blue.

Happy Canada Day

1st July