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| How to write a report: tips and steps |

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Many functions require you to write reports. Whether it's your management wanting a report on customer satisfaction or sales teams looking for information on new customers, life in business is full of various reports. How do you write a report so that it is understandable and useful for its recipients? What are the steps and key elements? Discover our tips for creating relevant and convincing reports.[[1]](#footnote-1)

# What is a report?

A report is a document that presents the results of a survey, project, or measure in place. It can also take the form of an in-depth analysis of a problem or a specific set of data. The purpose of a report is to inform and present facts, conclusions, and possibly options and recommendations that will serve as a basis for corporate strategies.

Some sectors of activity such as science, health, justice, government or academia need regular reports to draw conclusions from their past actions and define the contours of future actions. But they are also needed in other business sectors to drive strategy and optimize results. Reports typically consist of several key elements, including:

1. Detailed summary of activities carried out.
2. Analysis of the impact of the activity.
3. Evaluation of facts and data.
4. Conclusions and predictions of the consequences of the activity.

Recommendations for improvements or next steps. Report writing is an essential part of some professions. Doctors, for example, are required to write medical reports. Police officers write other types of reports to describe the progress of interviews or investigations. Project managers write regular reports to keep their managers informed of the progress of the project(s). Despite differences in format, reports in all sectors share common requirements: they must be well-written, accurate, effective and useful.

# Steps in writing a report.

Knowing how to write good reports will give you an edge in the company, as this type of skill is valued by employers. Here are some steps to follow when writing a report:

## Determine the purpose [[2]](#footnote-2)of the report.

Before writing your report, you need to identify its purpose and the need it is intended to satisfy in order to guide the writing and research. To do this, you will need to determine:

1. The subject [[3]](#footnote-3)of the report.
2. The need that this report addresses.
3. The target audience for the report.
4. The purpose of the report.

Once you have answered these questions, you will have a clearer picture of where you want to go with your writing. Terms of reference are usually explained in the first paragraph so that the reader can determine their relevance without having to read the entire document. Defining concrete terms early on will help you create the outline of the report and not get lost in the writing process.

## Identify the recipients and how they will use the report.

A sales report for a company's sales management will not be structured in the same way as a customer satisfaction report after a new product launch.

The sales report will have to be factual, based on real sales figures, identify the strengths and weaknesses of the sales outlets, compare the year-on-year results of various products, or possibly detail the performance of individual salespeople. In this case, the sales management will have an analytical eye on this report and will use it to make decisions directly related to the activity (reinforcing the presence in a region, removing a product from the catalog, assigning a salesperson to another region...). The report must be able to provide an overview, synthetic and easily understandable of the situation.

A customer satisfaction report based on "feelings" or other qualitative criteria should of course be based on the customer survey, but could also include data on the competition, detailing the general feeling or the rough edges of the survey in order to get an overview that will allow you to act accordingly (modify the characteristics of a product, price adjustments...).

Thus, it is important to interview the "sponsor(s)" of the report. Plan a moment of exchange in order to take into consideration their expectations and needs.

## Conduct[[4]](#footnote-4) research and identify relevant sources.

To write a report, you will need to collect data directly related to your topic. In some cases, this data will be available in the field, because of the activity itself. For example, a sales assistant who tracks sales for a team of salespeople on a daily basis may be able to use her numbers to produce a monthly sales report by region and by salesperson.

In other situations, you will only have access to a portion of the data and will have to do more research to get more. This would be the case, for example, if you need to compare the performance of your company's product, for which you have the data, to that of a competing product.

To make the report easier to read, it is important to organize the way the data will be organized and presented. The report should be easy to read and interpret. Tables, graphs, possibly diagrams and photos often help by providing more visual and synthetic information than long sentences.

You should also carefully cite your sources, which means knowing where and how you found your data. Rigor is absolutely essential on this point so that the credibility of your report is not called into question.

## Prepare the outline of the report: the plan

The next step is to build the outline of your report. This outline can take the form of a bulleted list detailing the different parts of the document. Here is an example of a common outline for preparing a report:

1. Title of the report.
2. Executive Summary.
3. Introduction.
4. Definitions (glossary).
5. Summary of the procedure.
6. Data analysis.
7. Conclusions.
8. References or bibliography.

You can of course adapt this plan to the type of report you need to produce, some can be more developed than others depending on their importance. Remember, the people who will read your report will want to read useful and simple information, so it may be appropriate to delete some parts if they are not essential for a good understanding of the subject.

## Analyse and present the data.

A report will often be comparative (results for year N vs. results for year N-1) or explanatory (identify the reasons for a drop in sales, impact of a new hiring policy, etc.).

In the first case, it is crucial to remain factual, to compare the figures and to present them clearly (table, graph, etc.).

In the second case, which is more delicate because it does not always allow you to rely on figures, it is important not to make any "judgments" at this stage of the report. Just present the facts. For example, if you are trying to determine the reasons for a drop in sales of a product, start by presenting the figures, then develop the "environmental" elements: end of the collaboration with a sales partner, change in the composition of a product or its packaging, etc. The conclusions and the cause-and-effect relationship between these elements will only be detailed later in your document.

## Present the conclusions.

Once all the data is presented, you can move on to the conclusions.

You can do this in a straightforward manner if the conclusions seem indisputable. If your company's sales dropped by 12% due to the withdrawal of a flagship product that accounted for 12% of the same sales, it seems obvious that customers did not switch to other products and that it will have to be replaced or reintroduced to the market in order to regain an equivalent level of sales.

If the consequences of certain facts are not as obvious as in the previous case, you can present several hypotheses. Imagine, for example, that a similar drop in sales occurred while the flagship product was still on the market, but your company encountered problems in its supply chain and some points of sale were not delivered on time, that the weather conditions were unfavourable to your product, that your best salesperson left the company. There are many factors that can influence your sales decline, it is important not to overlook any of them and avoid jumping to conclusions.

## Recommend actions.

Depending on the focus of the report, you may be asked to make recommendations to address the issue raised. If sales have declined and your findings show that the decline is more related to an increase in the price of the product than to a new competitor entering the market, then you may recommend that a new price schedule be developed.

However, not all reports systematically require recommendations to be written: the report can be used as a basis for establishing them at another level (general management, marketing, human resources, etc.). Thus, it is important to ask your client if he wants you to make recommendations or not.

# How to write a report: final tips

Once you have gone through all the steps of writing a report, it is still important to keep in mind certain elements so that your report will be read, appreciated and its value recognized by your team, colleagues or management.

Adopt a collaborative approach: whether you are working alone or as part of a team to write the report, don't hesitate to draw on previous reports on the same subject or to ask for advice from any specialists in the company.

Proofread your report or have it proofread: a report containing important information and accurate conclusions will lose credibility if it is poorly formatted and full of spelling mistakes.

Take special care with distribution: if the report is confidential, consider password protection. If the report is to be distributed throughout the company, consider talking to the internal communications department or manager so that the entire company is aware of its publication.

# I love you

# Good moring

1. a report [↑](#footnote-ref-1)
2. Purpose [↑](#footnote-ref-2)
3. [↑](#footnote-ref-3)
4. Conduct [↑](#footnote-ref-4)