

ENGL 017 Business Report Writing

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Date of report: October 16, 2024
Prof. C. Llave

OUTLINE OF THE REPORT

- PROPOSAL
- MINUTES OF THE MEETING
- MEMORANDUM
- PROGRESS REPORT
- PERFORMANCE REPORT
- COST-BENEFIT ANALYSIS REPORT
- FINANCIAL REPORT
- INCIDENT REPORT

PROPOSAL

WHAT IS PROPOSAL?

A proposal is a formal document designed to persuade an individual or group to consider and approve a specific plan or idea. It typically outlines a problem, presents a solution, and details the benefits of implementing the proposed plan. Proposals are prevalent in various contexts, including business, academia, and government.

BUSINESS PLAN VS. BUSINESS PROPOSAL

- **Business Plan:** A comprehensive document outlining a business's strategic direction, operational strategies, financial forecasts, and goals. It serves as a roadmap for internal management and is often used to attract investors.
- **Business Proposal:** A targeted document designed to persuade potential clients or partners to engage in a specific project or purchase a service. It focuses on solving a particular problem for the client and includes pricing details.

Feature	Business Plan	Business Proposal
Purpose	To outline overall business strategy and goals	To persuade clients to buy products/services
Audience	Internal stakeholders, investors, financial institutions	Potential clients or partners
Content	Detailed operational plans, market analysis, financial projections	Specific solutions to client problems, pricing, terms
Structure	Typically includes sections like executive summary, market analysis, and financial forecasts	Often includes title page, cover letter, problem statement, proposed sol

Length	Usually 15-30 pages	Generally shorter, around 10 pages
Use Frequency	Regularly updated as the business evolves	Created for specific opportunities or requests

DIFFERENCES BETWEEN ACADEMIC AND BUSINESS PROPOSALS

Understanding the distinctions between academic and business proposals is crucial for effective communication in both fields. Here are the primary differences:

WRITING STYLE

Academic Writing: Generally adopts a formal tone, often using the third person. It emphasizes objectivity, thorough research, and adherence to specific formatting guidelines. The language is precise and avoids colloquialisms.

Business Writing: More flexible in tone; it can use first or second person depending on the audience. It focuses on clarity and brevity, often employing straightforward language to convey ideas quickly. The writing may include persuasive elements aimed at influencing decisions.

AUDIENCE

Academic Audience: Typically consists of scholars, researchers, or students who possess some prior knowledge of the subject matter. The expectation is that the audience will engage with complex ideas and analyses.

Business Audience: Comprises managers, employees, clients, or stakeholders who may have varying levels of familiarity with the topic. Business writing must cater to busy professionals who require clear and actionable information.

USE OF RESEARCH

Academic Proposals: Heavily rely on primary research methodologies and extensive literature reviews to support claims. They aim to fill gaps in existing knowledge or offer new insights into a field


Business Proposals: Often utilize secondary data and market analysis to justify recommendations. They focus on practical solutions rather than theoretical exploration.

Parts of Business Proposal


1. **Title Page** – This is the first page of the proposal and includes the business name, the proposal title, the name of the person or company the proposal is being submitted to, the name of the person or company submitting the proposal, and the date. It gives a professional first impression and helps identify the document.
2. **Table of Contents** – This section lists the major parts of the proposal with corresponding page numbers. It helps the reader navigate the document easily and find specific sections quickly.
3. **Executive Summary** – A brief overview of the proposal that highlights the key points, including the problem, proposed solution, expected outcomes, and benefits. This section is meant to grab the reader's attention and encourage them to read further.
4. **Problem Statement** – Clearly describes the problem, challenge, or need that the proposal aims to address. This section provides background information, research, or data to support why the issue is significant.
5. **Proposed Solution** – Outlines how the business intends to solve the problem stated. This section explains the approach, strategies, and specific actions that will be taken to achieve the desired outcome.
6. **Qualifications** – Highlights the credentials, experience, and expertise of the business or individuals involved. It helps establish credibility and assures the reader that the company is capable of delivering the proposed solution effectively.
7. **Timeline** – Provides a detailed schedule of how and when different stages of the project or service will be completed. It ensures clarity on the duration and deadlines for each phase of the work.
8. **Pricing** – Breaks down the cost of the proposed solution, including services, materials, labor, and other expenses. It helps the reader understand the financial investment required for the project.
9. **Terms and Conditions** – Specifies the legal and operational aspects of the proposal, such as payment terms, warranties, liabilities, and other policies. This section protects both parties by defining expectations and obligations.
10. **Agreement** – The final section where both parties sign to confirm their acceptance of the proposal. It serves as a formal commitment to proceed with the project under the agreed terms.

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English Department

EVENT PROPOSAL CHECKLIST



Republic of the Philippines
POLYTECHNIC UNIVERSITY OF THE PHILIPPINES
Office of the Vice President for Campuses
PARANAQUE CITY CAMPUS



EVENT PROPOSAL


STUDENT ORGANIZATION: _____
 TITLE OF EVENT: _____
 DATE CONDUCTED: _____
 DATE RECEIVED: _____

DOCUMENTS NEEDED	YES	NO	REMARKS
1. Approval letter			
2. Cover page/ Title Page			
3. Table of contents			
4. Acknowledgement			
5. Proposal			
5.1 Event title			
5.2 Description of the event			
5.3 Proponents			
5.4 Rationale			
5.5 Objectives of the event			
5.6 Target participants			
5.7 Date, time & venue			
6. Appendix			
6.1 List of Committees of assigned tasks			
6.2 Program plan			
6.3 Minutes of the meeting (if applicable)			
6.4 Table of Activities (Gantt chart- before event, during the event and after event)			
6.5 Detailed budget proposal			
6.6 Publication Materials (posters)			
6.7 Sample invitation letter/ Any communication letter (judge, participants, resource speaker, sponsors)			
6.8 Sample certificates (judge, participants, resource speaker, sponsors, etc.)			
6.9 Registration and Evaluation (links/forms)			
6.10 Floor plan or venue (if applicable)			
6.11 Criteria and Guidelines (if applicable)			
6.12 Bionote of the speakers (if applicable)			
6.13 Contingency Plan (if applicable)			

Evaluated by: _____

NAME & SIGNATURE _____

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ISO 9001:2015 CERTIFIED
CERTIFICATION NUMBER: 00000000000000000000

MINUTES OF THE MEETING

What are Minutes of a Meeting?

- Official written record of a meeting.
- Documents key points, decisions, and actions.
- Acts as a reference for future meetings.

Importance of Minutes of the Meeting

- Provides a legal document for decisions made.
- Keeps all participants accountable for tasks.
- Ensures transparency in decision-making.
- Serves as a record for absent members.

Key Elements of Minutes of the Meeting

- Date, Time, and Location of the meeting.
- Names of Attendees (present and absent).
- Approval of Previous Minutes (if applicable).
- Agenda Items Discussed.
- Decisions Made.
- Action Items (who is responsible for what).
- Time of Adjournment.

III. **OPEN ISSUES:**

- Each year level should have representative/ chairman to lead the school intramurals.
- Intramurals/ collection fee
- How to make the school intramurals become successful

IV. **PLANS:**

Motion: Elect the potential leaders for the event.
Vote: Majority approval
Resolved: Elected Chairman of each year level took the challenge and accepted the responsibility.
Motion: Dispersed tournament managers' tasks.
Vote: Unanimous approval
Resolved: The tournament managers got the list of players and prepared the instruments/ materials needed for the games.
Motion: Discussed the use of PE Uniforms in all levels.
Vote: Motion approved- three in favor, one was opposed. The use of PE uniform is a nice idea to minimize the students' expenses but the one opposed insisted that not all students can provide the PE uniform's payment.
Resolved: The body agreed that the PE uniforms will be used by the students as their costumes/ attire for the incoming school intramurals.

V. **SPECIAL NOTE/S:** Next meeting will be on September 8 2014; 2 o'clock in the afternoon at the PTMSMNHS Session hall.

VI. **ADJOURNMENT:**
Meeting adjourned at 5:00 in the afternoon.

Prepared by: Estrella H. Piccio
Note taker/ Secretary

Approved: Mary Jane S. Dagohoy
Head Teacher II/ MAPEH DEPT.

Noted: FRED E. MAGBANUA
School Principal III

Republic of the Philippines
Department of Education
Region IV– B Mimaropa
Division of Occidental Mindoro
PEDRO T MENDIOLA SR MEMORIAL NATIONAL HIGH SCHOOL
National Road, Bagong Sikat, San Jose, Occidental Mindoro

SAMPLE MINUTES OF MEETING

Name of Association: MAPEH DEPARTMENT

Type of meeting: Coordinating meeting

Date: September 2, 2014

Time: 3:30 p.m.

Meeting Facilitator: Mrs. Mary Jane S. Dagohoy
HEAD TEACHER II/ MAPEH DEPT.

Invitees: MAPEH Teachers and Year Level Coordinators

Call to Order: Meeting was called to order at PTMSMNHS's Conference Hall.
Quorum was established

Roll Call:

Attendees Present: Joel Grospe Jodura Transfiguracion
Mylene Pizarra Daisy Dayanan
Alvin Masangkay Thea Eunice Estonilo

Absent: None

Meeting Agenda:

1. To discuss the PTMSMNHS Intramurals 2014.
2. To designate Chairmen and Vice-Chairmen for the said event.
3. To deliberate the activities and games to be included in School intramurals.

I. **APPROVAL OF MINUTES FROM LAST MEETING:**
Motion: To approve the Friday's School Planning Team meeting together with the School Principal about the School Intramurals 2014.
Vote: Unanimous approval
Resolved: The minutes of the August 29 meeting are approved as corrected and entered into the School's records.

II. **REPORTS:**

- Management Report given by Mrs. Mary Jane S. Dagohoy about last year's intramurals. Written reports presented and maintained in Department's records.
- Collections Report given by the Treasurer, Maria Paz R. Manila.

Before and During the Meeting

Before the Meeting:

- Familiarize yourself with the meeting agenda.
- Prepare a template or outline.
- Know the participants and roles.
- Clarify expectations with the chairperson.

Tips for Effective Minute-Taking During Meeting

- Listen carefully and focus on key points.
- Record decisions, not the entire conversation.
- Use abbreviations or shorthand for efficiency.
- Stay neutral – avoid personal opinions.

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- Ask for clarification if needed.

Common Mistakes to Avoid

- Recording too much detail or irrelevant information.
- Missing important action points or decisions.
- Delaying the preparation and distribution of minutes.
- Including personal opinions or bias.

Format of Minutes of the Meeting

 Republic of the Philippines POLYTECHNIC UNIVERSITY OF THE PHILIPPINES Office of the Vice President for Campuses PARANAQUE CITY CAMPUS CENTRAL STUDENT COUNCIL		
AGENDA	DISCUSSION POINTS	SUGGESTION OR CONCERNS

-----x----- Meeting has been adjourned. -----x-----
02 : 00 PM

Prepared by:

(NAME)
Secretary

Reviewed by:

(NAME)
President

Noted by:

(NAME)
Prof/Adviser

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QUALITY MANAGEMENT SYSTEM

 Republic of the Philippines POLYTECHNIC UNIVERSITY OF THE PHILIPPINES Office of the Vice President for Campuses PARANAQUE CITY CAMPUS CENTRAL STUDENT COUNCIL				
Minutes of the Meeting Meeting Code No. 1				
Meeting Title:	General Meeting			
Agenda :	1.			
Attendee/s:	CENTRAL STUDENT COUNCIL 1.			
Absent/s:	CENTRAL STUDENT COUNCIL 1.	Quorum:	Present	Not present
Call to order:				
Meeting Date:	08 / 29 / 2024	Meeting Venue:	Via ZOOM	
Time Started:	02: 00 PM	Time Ended:	03: 00 PM	

ISO 9001:2015 CERTIFIED
QUALITY MANAGEMENT SYSTEM

MEMORANDUM

What is a memorandum?

-Memorandum is commonly known as a memo, refers to a brief written message, record, or reminder that is used for internal communication in academic or business contexts. Providing or requesting information from those inside the organization is the common use of memos.

BEST PRACTICE FOR WRITING MEMOS

- **Know Your Audience:** To improve comprehension and engagement, adjust the tone and material according to the audience.
- **Be Concise and Clear :** Avoid jargon words and use straightforward language. Stay on the topic to keep the reader's attention.
- **Use of Headings and Bullet Points:** These tools help to arrange information and easier browsing
- **Always Proofread:** This will keep the memo free from typographical and grammatical errors in order to maintain professionalism.

HOW TO WRITE MEMO

1. Write a clear and concise heading.

-The heading will clearly state who the memo's recipient, who is the sender, and what it is all about, as well as the date of its distribution. A well-written heading identifies the individuals involved and the primary subject of discussion.

Example:

Memorandum 1 series of 2024-2025

TO: Sales staff

FROM: Kevin Blake

DATE: 02/10/2024

SUBJECT: Shipping policy changes

2. Include a brief introduction

-The first two or three sentences of the body of the memo should be focused on the introduction. Within a memorandum, this section will include background information, summarize the topic, and highlight the message's objective.

Example:

In considering consumer feedback on our shipping guidelines, we're making some adjustments to better serve our consumers and make future transactions easier. The effective date of these changes to policy is March 1, 2024.

3. Write a body that accurately captures the main subject

-The body must be concise and brief, this where all vital information will be discussed that must be supported by the list of any resources, contact points, or action items that relate to the matter at hand. Outlining these details in the body will be able for the reader to know what to do next.

Example:

The policy changes include a revised order return procedure and lower delivery costs for the majority of categories. With these improvements, we expect to see increased attempts to grow our staff and hire the salesperson.

The updated charge change rules and the comprehensive report of these policy changes are included for your reference.



4. End with a professional closing statement

-The closing statement allows the recipient to designate itself and any other individuals who will be responsible to reply to everyone's questions, emails, and team chat app messages. The closing statement should outline relevant points of contact.

Example:

Please feel free to contact Jannah Cruz or me by Zoom Chat or email if you have any questions. As the new policy takes effect, we are pleased to assist you in any way we can.

Example of Academic memorandum

	Republic of the Philippines POLYTECHNIC UNIVERSITY OF THE PHILIPPINES Office of the Vice President for Campuses PARANAQUE CITY CAMPUS CENTRAL STUDENT COUNCIL
Memorandum Order No. 1, Series of 2024	
Date	: October 3, 2024
To	:
From	: President of BSOA 2-1
Re	: General Meeting
Please be informed that we will have a General Meeting on October 07, 2024 (Monday) at 00:00 a.m. onwards	
The Agenda are as follows:	
1.	
Thank you.	
Noted by:	
Adiser	
<p>PUP Paranaque Campus, Col. E de Leon St. Wawa, Brgy. Sto. Nino, Paranaque city Direct line: (02) 8553 8623 Website: www.pup.edu.ph Email: paranaque@pup.edu.ph "THE COUNTRY'S 1st POLYTECHNIC U"</p> <div></div>	

TYPES OF MEMOS

- **Informative Memo**
-This type of memo provides information about a subject matter, such as new upcoming events, policy changes or if there were changes in procedure . The purpose of an informative memo is to inform the readers and explain or discuss the rationale behind the information.
- **Directive Memo**
-This type of memo provides direction or instruction to the readers, such as how to complete a task, follow a rule, or comply with a requirement. The purpose of this memo is to persuade the readers and provide clear instruction and guidance.
- **Request Memo**
-This type of memo is to ask the readers to do something, such as approve a form, provide a specific resource or grant permission on something. The purpose of this memo is to convince the readers and make a request.
- **Response Memo**
-This type of memo is to answer different types of questions, address an issue or provide feedback, such as resolving a problem, answer an inquiry and give an evaluation. The purpose of this memo is to satisfy the readers and demonstrate competence.

PROGRESS REPORT

What is a progress report?

-A progress report is a document that outlines the advancement of a project, task, or goal over a specific period. It provides a comprehensive overview of the work completed, activities in progress, and any challenges encountered. The primary purpose of a progress report is to keep stakeholders informed about the project's status, ensure it remains on track, and facilitate informed decision-making.

THE MAIN PURPOSES OF A PROGRESS REPORT INCLUDE:

- **Transparency-** They provide stakeholders with visibility into the project's status, fostering trust and accountability.
- **Evaluation-** They help assess whether the project is on track regarding timelines and budgets, allowing for timely adjustments if necessary.

- **Problem Identification-** By documenting challenges faced during the reporting period, they enable teams to address issues proactively.

STRUCTURE OF A PROGRESS REPORT

- **Introduction:** This section provides a brief overview of the project, its objectives, and the reporting period covered.
- **Work Completed:** This section details the specific tasks or activities that have been completed during the reporting period. It may include dates, deliverables, and any relevant metrics or data.
- **Work in Progress:** This section outlines the tasks or activities that are currently underway and their estimated completion dates. It may also highlight any challenges or obstacles encountered in these tasks.
- **Upcoming Task:** This section lists the tasks or activities that have not yet been started but are planned for the upcoming period. It includes estimated start and completion dates.
- **Conclusion:** This section summarizes the key takeaways from the report, highlights any significant achievements or challenges, and provides a final assessment of the project's overall progress.

<p>Weekly Progress Report: Website Redesign Project</p> <p>This report covers the progress made on the website redesign project for Acme Corporation during the week of October 20-27, 2023. The project aims to create a modern and user-friendly website that better showcases Acme's products and services.</p> <p>Work Completed:</p> <ul style="list-style-type: none">● Homepage Design: The homepage design was finalized and approved by the client on October 23rd.● Content Creation: Initial content for the homepage, about us page, and product pages was written and reviewed by the client on October 25th. <p>Work in Progress:</p> <ul style="list-style-type: none">● Website Structure: The website's structure is currently being implemented using HTML and CSS, including navigation menus and page layouts. Estimated completion date: October 31st.● Logo Integration: The Acme Corporation logo is being integrated into the website design. Estimated completion date: October 28th. <p>Upcoming Tasks:</p> <ul style="list-style-type: none">● Product Page Development: Development of the product pages will begin on October 28th, including product descriptions, images, and pricing information. Estimated completion date: November 4th.● Contact Form Implementation: Implementation of the contact form will begin on October 31st, allowing users to easily reach out to Acme Corporation. Estimated completion date: November 2nd. <p>The website redesign project is progressing well. The homepage design and initial content are complete. Website structure and logo integration are nearing completion. The next phase will focus on developing product pages and implementing a contact form. The project remains on track for its targeted launch date.</p>

TIPS FOR WRITING AN EFFECTIVE PROGRESS REPORT

- **Use Clear and Concise Language:** Write in a clear, concise, and objective manner, avoiding jargon or technical terms that may not be understood by all stakeholders.
- **Provide Data and Evidence:** Support your statements with data, metrics, or other evidence to demonstrate the progress made and justify any claims or conclusions.
- **Use Visual Aids:** Incorporate visual aids such as charts, graphs, or timelines to enhance readability and make complex information easier to understand.
- **Maintain Regular Reporting Cadence:** Establish a regular reporting cadence that aligns with the project's timeline and the needs of stakeholders.
- **Use a Consistent Format:** Employ a consistent format and structure for all progress reports to ensure consistency and ease of comparison across reporting periods.

BENEFITS OF PROGRESS REPORT

Progress reports offer benefits for both individuals and organizations, helping to ensure projects stay on track, communication is clear, and goals are achieved.

1. **Improved Project Management:** They provide transparency, early issue detection, and data for informed decision-making.
2. **Enhanced Communication:** They foster alignment, reduce miscommunication, and promote teamwork.
3. **Increased Efficiency:** They help prioritize tasks, avoid redundancy, and improve time management.
4. **Enhanced Stakeholder Engagement:** They build confidence, improve communication, and foster trust.
5. **Learning and Improvement:** They identify areas for improvement, document successes and failures, and provide valuable lessons for future projects.

Progress reports are essential for successful project management. They promote transparency, foster collaboration, and provide valuable data for informed decision-making. By regularly tracking progress, identifying challenges, and outlining future plans, progress reports ensure projects stay on track and achieve desired outcomes.

PERFORMANCE REPORT

What is a performance report?

-Performance report is a valuable business tool that shows a compilation of analysis, projections, revenue and budget to help a business get an overview of how it's performing. It acts as a comparison of how business results and performances are against a business's baseline.

TYPES OF PERFORMANCE REPORT

- **Forecasting report** - A forecast report states upcoming expectations and projections for a project, often predicting future performance across specific parameters. Leaders cause this to track and allocate resources effectively with forecast reporting.

Fit Small Business		RETAIL SALES FORECAST				
*Fill up unshaded cells only.		OPERATING DAYS:			300	
	Year 1	Year 2	Year 3	Year 4	Year 5	
CUSTOMERS						
Est. Daily Foot Traffic Passing Store	4,000	4,150	4,300	4,500	4,700	
% of Foot Traffic Entering Store	1.25%	1.75%	2.00%	2.00%	2.75%	
Total Customers Per Day	50	73	86	90	129	
SALES						
% of Customers Who Purchase	20.00%	21.00%	22.00%	23.00%	24.00%	
Total Number of Sales Per Day	10	15.25125	18.92	20.7	31.02	
REVENUE						
Average Sale Value	\$20.00	\$25.00	\$30.00	\$35.00	\$40.00	
Revenue Per Day	\$200.00	\$381.28	\$567.60	\$724.50	\$1,240.80	
Total Revenue Per Year	\$60,000.00	\$114,384.38	\$170,280.00	\$217,350.00	\$372,240.00	
OTHER REVENUE						
Other Source # 1	\$200.00	\$200.00	\$200.00	\$300.00	\$400.00	
Other Source # 1	\$100.00	\$200.00	\$300.00	\$400.00	\$500.00	
Other Source # 1	\$210.00	\$220.00	\$230.00	\$240.00	\$250.00	
Other Source # 1	\$320.00	\$360.00	\$320.00	\$350.00	\$350.00	
Other Source # 1	\$55.00	\$57.00	\$59.00	\$61.00	\$63.00	
Other Revenue Total	\$885.00	\$1,037.00	\$1,109.00	\$1,351.00	\$1,563.00	
REVENUE GRAND TOTAL	\$60,885.00	\$115,421.38	\$171,389.00	\$218,701.00	\$373,803.00	

- **Status report** - A status report provides information on the current state of a project throughout the completion process. It shows if the project is on track to meet deadlines, gives a summary of the project details, highlights any areas of improvement and adds any objectives the project has achieved. Status reports can help you keep stakeholders aware of the project's overall development and updated on any changes.

Project Name:	Reporting Period:
Stakeholder:	Owner:
Project Manager:	Project Due Date:
Compiled By:	Date Submitted:

Summary

Item	Current Status	Prior Status	Summary
Project Status	On Time	Delayed	[Brief synopsis]
Scope	Choose an item.	Choose an item.	
Schedule	Choose an item.	Choose an item.	
Cost	Choose an item.	Choose an item.	
Risk	Choose an item.	Choose an item.	

Tasks

Task	Status	Objective	Planned	Actual	Progress Complete	Deliverable
[Name of activity]	In Progress	[What's the objective]	[When is it planned to be done]	[When was it completed]	25%	In Progress
	Choose an item.				Choose an item.	Choose an item.

- **PROGRESS REPORT** - A progress report includes all the work completed on the project since the last report. It outlines the tasks that you've completed on a project so far, any project goals that you achieved or changes to the project plans.

Software Development Progress Report

Dec 12, 2018

Developer's Full Name	Julie R. Hollenbeck
E-mail	juliehollenbeck@example.com
Date/Time Started	Wednesday, December 26, 2018 15:40
Target Date	Saturday, December 29, 2018
Progress of work (%)	70 / 100

How much of the work is completed?
 Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

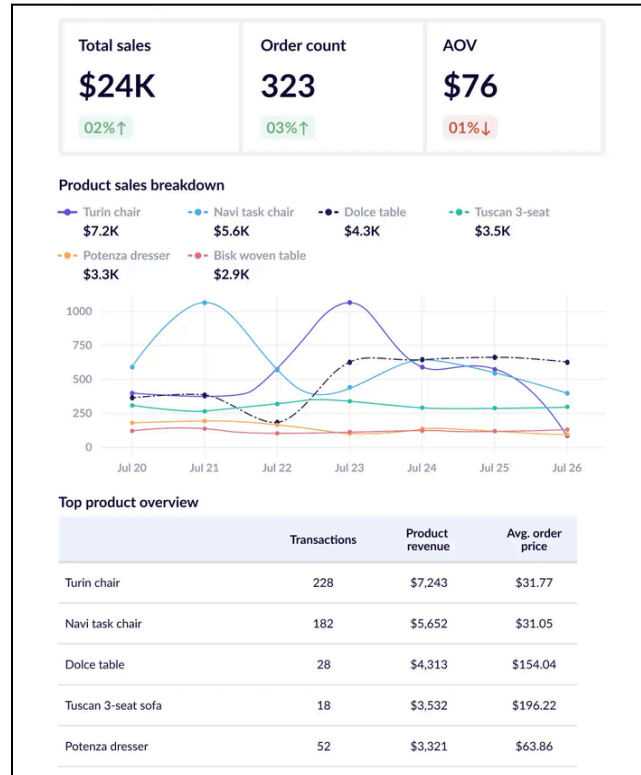
Remaining Work items
 Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

Experienced Challenges
 Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

How were the challenges handled?
 Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

Message:
 Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

- **TREND** - A trend report looks for any recurring issues that have appeared throughout several progress reports, so that professionals can identify those issues and resolve them to strengthen the production rate. It compares the current performance of a project to the most recent performance during a similar period of time.



- **VARIANCE** - A variance report compares the actual performance of a project to the estimated performance, using variables related to work performance measurement. These variables are the planned schedule performance compared to the actual scheduled performance, and the actual project cost compared to the planned project cost.

Category	Planned	Actual	Variance	Explanation
Budget (\$)	75,000	85,000	+10,000 (+13%)	Higher costs due to unexpected software license fees and increased contractor rates.

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English Department

Timeline (Weeks)	12	14	+2 weeks (+17%)	Delays caused by extended testing and client feedback revisions.
Scope (Features)	20 features	18 features	-2 features (-10%)	Two features postponed to the next phase due to complexity and time constraints.
Man-Hours	1,000 hours	1,150 hours	+150 hours (+15%)	Additional work required due to unanticipated integration issues with existing systems.

- **EARNED VALUE** - An earned value report uses mathematical calculations to indicate performance. Professionals base these calculations according to the variances found within the performance report. They use the time spent on the project and the cost of materials and labor compared to the amount of work completed on the project. Earned value reports give you insight into the rate of project production.

Metric	Planned Value (PV)	Earned Value (EV)	Actual Cost (AC)	Variance	Explanation
Budget at Completion (BAC)	\$150,000	---	---	---	Total planned project budget.
Planned Value (PV)	\$90,000	---	---	---	Budgeted cost for work scheduled to be completed by now.
Earned Value (EV)	---	\$80,000	---	---	Value of the work actually completed.
Actual Cost (AC)	---	---	\$85,000	---	Actual cost incurred to date.

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Cost Variance (CV)	---	---	---	-5,000	EV - AC; The project is over budget.
Schedule Variance (SV)	---	---	---	-10,000	EV - PV; The project is behind schedule.
Cost Performance Index (CPI)	---	---	---	0.94	EV / AC; For every \$1 spent, the project earns \$0.94 worth of work.
Schedule Performance Index (SPI)	---	---	---	0.89	EV / PV; The project is progressing at 89% of the planned rate.

- **INDIVIDUAL** - is a document that evaluates the performance of a specific employee or team member over a designated period. It provides a comprehensive overview of the individual's contributions, achievements, strengths, and areas for improvement, typically in relation to predefined objectives and key performance indicators (KPIs).

[Your Company Logo]		[Your Company Name]	
Monthly Employee Performance Review			
Employee Name		Employee ID	
Job Title		(Additional identifier)	
Department		Manager Name	
Review Period		Date of Review	
Manager Ratings			
	1 (Poor)	2 (Fair)	3 (Satisfactory)
	4 (Good)	5 (Excellent)	
Work Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>			
Job Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>			
Time and Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>			
Productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>			
Team Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>			
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **TEAM** - a document that evaluates and summarizes the effectiveness and productivity of a team over a specific period. It provides insights into how well the team is meeting its objectives, collaborating, and contributing to the organization's goals. The report typically includes quantitative and qualitative data to assess various aspects of team performance.



What is the importance of performance reports in business?

Performance reports in business are important because they tell you if you are doing well, looking at every aspect of the company versus each division. By continuously assessing goals and results, a business can readjust or change course. Critical reason why performance reporting is significant in a business:

- **serves as standards** - Because a performance report contains baseline data, it serves as a benchmark to compare against, helping you know if new projects, marketing, budgeting or other company-wide efforts are working.
- **foundation of other reports and documentation** - Businesses comply with industry and government regulations, which often include sharing public reports about a company's business dealings. Internal performance reports often are the basis of preparing external reports and documents because the work is already gathered.
- **monitor employee performance** - To compile a comprehensive performance report, you include data from employee performance, often elements like sales and revenue generation or cost savings efforts. Comparing employee goals against what they achieved can help you give guidance, feedback, motivation and encouragement.

- **enhance communication** - Performance reports improve communication across a business by sharing transparent information and with customers and consumers by learning what company strategies they react or respond to.
- **increase business efforts** - Performance reports done continuously offer real-time analytics, show you if the business is doing well or has room for growth. It can lead teams to reassess, change the course of action or adjust goals and strategies to increase the chance of profitability.

What to include in a Performance Report?

- **Timeframe of performance report**
- **Past performance analysis**
- **New customer acquiring rate**
- **Summary of changes approved**
- **Status levels of risks and issues**
- **Market share and market ranking information**
- **Variance analysis results**
- **Work completed during the reporting period**
- **Work pending completion by next reporting period**
- **Forecasted projections**
- **Liquidity and solvency ratios**
- **Additional information relevant to the report or asked for by stakeholders**

How to create a performance report?

1. Organize your data

Collaborate with teams to collect the relevant data you need for your report.

2. Follow a template

Whether you write your own or use professional templates through software options, outlining your report is a good start, making it easier to plug in the related data and information.

3. Write the report

Write a thorough and well-done performance report and get started early to meet deadlines. In many circumstances, a team of people works together on building elements of the performance report.

4. Proofread before sharing

Be sure to proofread your report entirely a few times. Consider printing a paper copy to help you look for any spelling, grammar, punctuation or formatting errors computer spellcheck may miss.

5. Monitor continuously

You can determine how frequently you update and share performance reports based on your business, a specific project or a goal. Consider setting up a consistent cadence, like daily, weekly, monthly, quarterly or annually—whatever best matches your needs.

Sample Performance Report for a business

Review of 2024 seasonal marketing strategy for G-Cafe

Report conducted by:

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December 10, 2021

Introduction

As a local, teen-run sustainable energy lawn care business, establishing effective marketing on a small budget to compete with established café shop is challenging. This report summarizes the marketing efforts, both print and digital, and results over the 2021 seasonal service period of April through November. *Results from research:*

- Teams created three new social media accounts, with a minimum of weekly postings on each.
- Growth across platforms reached 100 followers or more within the first month, though we attained fewer gains each subsequent month.
- Six new franchise contracts came from initial social outreach.
- New logo refresh and rebranded mailbox flyers doubled our seasonal client base by 55%.
- Our established new discount offerings provided value-added incentive to the customer far beyond our competitors, while only costing a collective \$900 from our budget.
- Our end-of-year customer satisfaction survey had a 100% completion rate with an average score of 90% satisfaction rating.

Conclusion

Our research showed customers found value in supporting a local teen-run business versus well-established area companies and found our service exceptional and our rates competitively priced. Our presence on social media profoundly impacted our customer growth, while also establishing future leads through engaging content, likes and shares. Social media also allowed networking within the lawn care community to further our level of expertise from other experienced professionals.

Solutions

- Hire a part-time digital [marketing director](#) for more content creation
- Establish an 85% or higher customer retention rate next season
- Create a website to build a digital footprint and expand growth

References

- Customer satisfaction survey results
- Competitor analysis
- Ad hoc information from small business community resources

COST BENEFIT ANALYSIS REPORT

- It is a systematic process used to evaluate the advantages (benefits) and disadvantages (costs) of a decision or project. It helps a team who is proposing a project to determine whether a project or decision is financially feasible and provides a basis for comparing alternatives.

KEY COMPONENTS OF COST BENEFIT ANALYSIS

- **Objective or Purpose** - This sets the foundation for the analysis by defining what the CBA is meant to achieve. CBA is to assess whether a project is financially feasible and whether its benefits justify the costs. This analysis provides a structured way to evaluate the potential value of any proposed initiative, helping decision-makers understand the implications of their choices.
- **Identification of Costs** - is the process of recognizing and categorizing all expenses associated with a project or decision.
 - **Direct Costs** - are expenses that can be directly attributed to a specific project or activity. These costs are easily identifiable and measurable, as they occur as a direct result of the project's implementation.
 - **Indirect Costs** - are expenses that cannot be directly linked to a specific project. Instead, these costs support overall operations and may be shared across multiple projects or activities.
 - **Opportunity Costs** - represent the potential benefits that are foregone when one option is chosen over another. These costs highlight the value of the next best alternative that is not pursued due to the allocation of resources to a particular project.
- **Identification of Benefits** - is the process of recognizing and categorizing all expenses associated with a project or decision.
 - **Tangible Benefits** - are measurable and quantifiable advantages that arise from a project or investment. These benefits can be expressed in monetary terms and often have a direct impact on the financial performance of an organization or project.
 - **Intangible Benefits** - refer to qualitative advantages that are not easily measurable in monetary terms. While these benefits may not have a direct financial impact, they can significantly enhance the overall value of a project and contribute to long-term success.

- **Time Frame** - refers to the specific period over which the costs and benefits of a project or investment are evaluated.
- **Discount Rate** - is the rate used to convert future costs and benefits into their present value. It reflects the concept of the time value of money, which states that money available now is worth more than the same amount in the future because of its potential earning capacity.
- **Present Value** - is the current value of a future sum of money, calculated by discounting it at a specific discount rate.

- **Formula:**

$$PV = \frac{FV}{(1 + r)^n}$$

PV = Present Value

FV = Future Value (the amount of money in the future)

r = discount rate

n = number of periods (years, months, etc.)

EXAMPLE OF BUSINESS COST BENEFIT ANALYSIS REPORT

COST-BENEFIT ANALYSIS TEMPLATE				
Summary page				
Uncounted Cash Flows	Reference	Fiscal Year		
		2014	2015	2016
Costs	6.1			
Development Costs		\$300,000	\$250,000	\$250,000
Operational Costs		\$0	\$0	\$300,000
Non-Recurring Costs	6.1.1	\$0	\$0	\$400,000
Recurring Costs	6.1.2	\$400,000	\$400,000	\$400,000
Total Annual Cost	6.1.3	\$700,000	\$650,000	\$750,000
Total Cost Over Estimated Lifetime	6.1.4	\$700,000	\$2,100,000	\$3,000,000
Benefits	6.2			
Cost Reduction	6.2.1	\$0	\$0	\$500,000
Revenue Benefits	6.2.2	\$0	\$0	\$0
Letter Cost Reduction	6.2.3	\$0	\$0	\$0
Overhead Reduction	6.2.4	\$0	\$0	\$50,000
Intangible Benefits		\$0	\$0	\$0
Other Benefits		\$0	\$0	\$0
Total Annual Benefit	6.2.5	\$0	\$0	\$550,000
Total Benefit Over Estimated Lifetime	6.2.6	\$0	\$0	\$550,000
Net Annual Cash Flow		\$ (700,000)	\$ (650,000)	\$ (1,350,000)
Discount Factor (for more advanced CBA, back CBA may ignore the section below)				
Discount Rate	6.5			3.0%
Base Year				2014
	Discount Factor	1.0000	0.9709	0.9426
Discounted Flows	Reference	2014	2015	2016
Costs		\$700,000	\$631,094	\$1,402,411
Benefits		\$0	\$0	\$518,426
Net Annual Cash Flow		\$ (700,000)	\$ (631,094)	\$ (1,083,985)
Cumulative Annual Cash Flow		\$ (700,000)	\$ (1,331,094)	\$ (2,415,079)
Net Present Value				\$ -4,020,617

Cost Benefit Analysis: Customer Service System				
Costs				
Category	Item	Quantity	Price	Total
Hardware & services	User workstations	7	\$2,000	\$14,000
	Server system	2	\$4,000	\$8,000
	Secure networked printers	2	\$1,750	\$3,500
System training	Cable installation	1	\$6,200	\$12,400
	Software licenses	1	\$22,000	\$44,000
	System overview	10	\$625	\$6,250
	Software	10	\$625	\$6,250
	Tools	15	\$875	\$13,125
TOTAL COSTS				\$107,525
Benefits				
More effective promotion campaigns				\$58,000
Improved lead conversion				\$42,000
Better customer retention and loyalty				\$28,000
Enhanced productivity				\$35,000
Workflow efficiencies				\$28,000
Higher quality database				\$45,000
TOTAL BENEFITS				\$236,000

FINANCIAL REPORT

- A formal record that provides key information that shows financial performance over time. It includes key documents that help stakeholders such as investors, management, regulators, and the public to understand the organization's financial health and performance. Government and private regulatory institutions also monitor financial reporting to ensure fair trade compensation and financial activities.
- A document that relates to the financial health of a business, such as reports relating to growth, assets, expenses, liabilities, and equity.

OBJECTIVES OF FINANCIAL REPORT

- **To facilitate decision making.** Financial reports provide stakeholders with information that helps them make informed decisions about whether to invest in or lend to a company as well to evaluate its financial health and performance.
- **To communicate financial performance.** Financial reports provide a summary of a company's financial performance and position including its revenues, expenses, assets, liabilities, and equity. This information can be used to evaluate profitability, liquidity, and solvency.
- **To build trust with stakeholders.** Financial reporting helps build trust with stakeholders by providing transparent and accurate information about a company's financial activities. This is important for maintaining a positive reputation and attracting investors and customers.

TYPICALLY INCLUDES:

• BALANCE SHEET

- provides a snapshot of the company's assets, liabilities, and shareholders equity at a specific point in time. Balance sheets provide real time assessment of current assets liquidity and debt coverage.

• INCOME STATEMENT

- profit and loss statement. Shows the company's revenues, expenses, and profit or loss over a specific period. Some companies or businesses track income statements quarterly and use this document to monitor financial processes throughout the year.

- **CASH FLOW STATEMENT**

- details the cash inflows and outflows from operating, investing, and financing activities over time. It is to measure the efficiency with which companies generate cash to pay down debt. It also provides investors with valuable insight into whether a business presents a higher investment risk.

- **SHAREHOLDER EQUITY STATEMENT**

- shows changes in the equity portion of the balance sheet such as dividends and retained earnings

INCIDENT REPORT

- An incident report is a formal written document that serves as a reference when an unexpected event or accident occurs. It is capturing and documenting information about a specific incident or event. It can include data such as who was involved, what happened, when it happened, where it happened, what caused it to happen, and any other relevant details. This event could result in injury, damage to property, or work interruptions.

The main purposes of an incident report are to:

- Capture key details of what happened while events are still fresh in witnesses' minds. It is the document of who, what, when, where, injuries/damage sustained, equipment/property affected, actions taken, and more.
- Allow a thorough investigation of the root causes and contributing factors that culminated in the incident. The more thorough your report, the more insight it provides on how and why the incident transpired.
- Identify any safety or operational policies violated that were part of the incident. It reveals if any protocols were not followed or were overlooked altogether.
- Inform subsequent action to prevent any similar incidents from occurring in the future. It will help management to see where they need to make improvements in processes, training equipment, policies, facilities, etc.

WHAT ARE THE 4 TYPES OF INCIDENT REPORTS?

Here are 4 types of incidents you should report:

1. **Sentinel events** – these are unexpected occurrences that resulted in serious physical or psychological injury or death (e.g., slips, trips and falls, natural disasters, vehicle accidents, disease outbreak, etc.).

- a. Worker injury incident
 - b. Environmental incident
 - c. Property damage incident
 - d. Vehicle incident
 - e. Fire incident
2. **Near misses** – these are situations where the people involved had no injuries but could have been potentially harmed by the risks detected.
 3. **Adverse events** – related to medicine, vaccines, and medical devices. These events occur when an act of commission or omission harms a patient rather than the existing disease or condition.
 4. **No harm events** – these are incidents that need to be communicated across an organization to raise awareness of any harm that may happen.

Example of Incident Report Template/Form

EMPLOYEE INCIDENT REPORT

Reported by: _____ Date of report: _____
Title / role: _____ Incident No: _____

EMPLOYEE INCIDENT INFORMATION	
Employee name: _____	Employee title / role: _____
Date of incident: _____	Time of incident: _____
Location: _____	
Specific area of location: _____	
Additional person(s) involved: _____	
Witnesses: _____	

Incident description including any events leading to or immediately following the incident

Employee explanation of events / circumstances:

Resulting action executed, planned, or recommended:

Employee name: _____ Employee signature: _____ Date: _____
Reporting staff name: _____ Reporting staff signature: _____ Date: _____
HR REP name: _____ HR REP signature: _____ Date: _____

Incident Report Template

REPORTED BY: _____ DATE OF REPORT: _____
TITLE / ROLE: _____ INCIDENT NO.: _____

INCIDENT INFORMATION	
INCIDENT TYPE: _____	DATE OF INCIDENT: _____
LOCATION: _____	
CITY: _____	STATE: _____ ZIP CODE: _____
SPECIFIC AREA OF LOCATION (if applicable): _____	

INCIDENT DESCRIPTION

NAME / ROLE / CONTACT OF PARTIES INVOLVED

1. _____
2. _____
3. _____

NAME / ROLE / CONTACT OF WITNESSES

1. _____
2. _____
3. _____

POLICE REPORT FILED: _____ PRECINCT: _____
REPORTING OFFICER: _____ PHONE: _____

FOLLOW UP ACTION

SUPERVISOR NAME: _____ SUPERVISOR SIGNATURE: _____ DATE: _____

PATIENT INCIDENT REPORT FORM

Use this form to report accidents, injuries, medical situations, criminal activities, traffic incidents, or student behavior incidents. If possible, a report should be completed within 24 hours of the event.

Date of Report: _____, 20____

PERSON INVOLVED	
Full Name: _____	Address: _____
Identification: <input type="checkbox"/> Driver's License No. _____ <input type="checkbox"/> Passport No. _____	
<input type="checkbox"/> Other: _____	
Phone: (____) _____	E-Mail: _____

THE INCIDENT	
Date of Incident: _____, 20____	Time: _____ <input type="checkbox"/> AM <input type="checkbox"/> PM
Location: _____	
Describe the Incident: _____	

INJURIES	
Was anyone injured? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, describe the injuries: _____	

WITNESSES	
Were there witnesses to the incident? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, enter the witnesses' names and contact info: _____	

Security Incident Report Template

REPORTED BY: _____ DATE OF REPORT: _____
TITLE / ROLE: _____ INCIDENT NO.: _____
SIGNATURE: _____ SUPERVISOR: _____

SECURITY INCIDENT INFORMATION	
INCIDENT TYPE: _____	DATE OF INCIDENT: _____
LOCATION: _____	
CITY: _____	STATE: _____ ZIP CODE: _____
SPECIFIC AREA OF LOCATION (if applicable): _____	

INCIDENT DESCRIPTION

NAME / ROLE / CONTACT OF SUSPECTS:

1. _____
2. _____
3. _____

DESCRIPTION OF UNAPPREHENDED SUSPECTS:

1. _____
2. _____
3. _____

WITNESS OR VICTIM NAME / CONTACT / SPECIFIC RELATIONSHIP TO INCIDENT:

1. _____
2. _____
3. _____

POLICE REPORT FILED: _____ PRECINCT: _____
REPORTING OFFICER: _____ PHONE: _____

FOLLOW UP ACTION

HOW TO CREATE AN EFFECTIVE INCIDENT REPORT

A narrative structure is essential while writing an incident report. Organize the report into three basic sections:

1. Introduction
2. Body
3. Conclusion

Introduction

The introduction serves as the **overview of the incident**. It answers the basic questions of **who**, **what**, **when**, and **where**. This section should include:

- **Who** was involved in the incident (names and roles).
- **What** happened (briefly summarize the incident).
- **When** it took place (date and time).
- **Where** it occurred (location and setting).

Body

The body details the incident from beginning to end. It includes all relevant occurrences before, during, and after the incident.

Conclusion

The conclusion describes the resolution of the incident as well as key findings.

WHAT TO INCLUDE IN AN INCIDENT REPORT

A well-structured incident report typically includes the following five key elements:

- **Date, time and location:** Provide specific details about when and where the incident occurred. This helps establish a timeline and context for understanding the event.

- **Description of the incident:** Clearly describe what happened, including relevant details such as the sequence of events, the people involved and any contributing factors. Use objective language and avoid assumptions or opinions.
- **Witness information:** Include names and contact information for any witnesses to the incident. Their accounts can provide valuable perspectives and corroborate details.
- **Action taken:** Outline any immediate actions taken to address the incident, such as first aid, evacuation procedures or contacting emergency services. Documenting these responses is crucial for understanding the effectiveness of the initial response.
- **Recommendations for prevention:** Offer suggestions on how similar incidents can be prevented in the future. This proactive approach demonstrates a commitment to improving safety and mitigating risks.

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