11 Informal Reports

Introduction to Report Writing

- Why write reports?
  - Inform managers and co-workers about the "big picture"
  - Useful for planning and decision-making
  - Help to coordinate initiatives and activities
  - Keep a record of company activity

Introduction to Report Writing, cont'd

- Reports are legal documents
  - Accurate
    - Use facts, not opinions
  - Complete
    - Include details and evidence
  - Objective
    - Cover the issue from all sides

Factors in Successful Reports

- The quality of a report and its effectiveness depend on three things:

  1. Content
  2. Clarity
  3. Skimmability

Content

- Write with your objective in mind

- Weigh information according to the report's future use

- Analyze facts to assist the reader in decision-making
  - Present information that relates directly to the problem you are solving
  - Don't manipulate your facts and findings

Content, cont'd

- Think of readers' needs when selecting information
  - What background information do they have?
- Organize the report logically
  - Good organization makes it easier to understand

Clarity

- Write simple sentences

- Delete extra material

- Guide the reader

- Cite sources

- Include visuals

- Use consistent evaluation criteria

Skimmability

- Readable font

- Informative headings and lists

- White space

Informal vs. Formal Reports

- Informal reports
  - Routine, internal, short
  - Often use a letter or memo format
  - May include personal pronouns and contractions
  - May contain visual aids

Informal vs. Formal Reports

- Formal reports
  - Long reports for external audiences
  - Based on extensive research or study
  - May include graphs and diagrams
  - Use formal language
    - No personal pronouns or contractions
  - Traditional structure
    - Title page, transmittal letter, table of contents, summary

Distinguishing Features of Short Reports

- Purpose
  - Informational
    - Collect data for the reader
  - Analytical/recommendation
    - Collect and interpret data to propose a course of action
    - Require analysis and persuasion

Distinguishing Features of Short Reports, cont'd

- Frequency of submission
  - Periodic
    - Filed at regular intervals
    - Keep readers up to date on activities and operations
  - One time
    - Deal with a specific issue or project

Distinguishing Features of Short Reports, cont'd

- Formats and distribution
  - Memorandum report
  - Prepared form report
  - Letter report
  - PowerPoint report
  - Formal report

Direct Approach

- Used in informational or analytical reports
- For routine, non-sensitive information
- When readers will agree with conclusions

Direct Approach, cont'd

- Direct informational reports
  - Purpose/introduction/background
  - Facts and findings
  - Summary

Direct Approach, cont'd

- Direct analytical reports
  - Introduction/problem/background
  - Conclusions or recommendations
  - Facts and findings
  - Discussion and analysis

Indirect Approach

- Use this structure for analytical reports
- Best choice when you anticipate resistance
  - Mirrors the logical processes of problem-solving
- Explain first to persuade or educate the reader
- Build up to conclusion or recommendations

Indirect Approach, cont'd

- Indirect analytical reports
  - Purpose/introduction/background
  - Facts and findings
  - Discussion and analysis
  - Conclusions or recommendations

Writing Style for Short Reports

- Study your audience and understand their preferences

- Project an air of objectivity and professionalism

- Use an impersonal style if you don't know your reader

- Write objectively and accurately

- Back up views and opinions with evidence and explanations

Headings

- Provide an outline or overview

- Break up text into manageable segments

- Indicate importance

Headings, cont'd

- Use functional or descriptive headings
  - Functional headings
    - Introduction Findings Summary
  - Descriptive or "talking heads"
    - New Policy on E-mail

- Keep headings short and clear
  - Maximum eight words

Headings, cont'd

- Use parallel construction
  - Balanced phrases and grammatical structures
- Ensure headings are clearly ranked
  - Capitalize and underline consistently at each level
- Put headings where they belong
  - Watch placement of page breaks

Headings, cont'd

- Don't enclose headings in quotation marks
- Don't use a heading as an antecedent for a pronoun
  - Repeat the noun in the first sentence in case your reader overlooks the heading

Steps in the Writing Process

- Planning

- Researching/analyzing information

- Composing

- Revising

Planning

- Scope?

- Resources?
  - Time
  - Budget
  - Personnel
  - Special services

- Responsibilities?
  - Create a work plan and timeline

Researching/Analyzing Data and Information

- Brainstorm first

- Find data

  o Current, valid, reliable, and accurate

- Analyze and tabulate data

- Record and cite/reference sources of information

Composing and Revising

- Create an outline
  - Alphanumeric or decimal
- Complete multiple drafts/revisions
- Take a break before proofreading
- Show changes to contributors for approval

Elements of Informal Reports

- Introductory statement
  - States the purpose of the report
  - Previews key points
  - Outlines data collection methods

Elements of Informal Reports, cont'd

- Findings
  - Organizes the data by subheadings
    - Chronological/alphabetical
    - Comparisons
    - Component parts/evaluative criteria
- Discussion/analysis
    - Interprets findings

Elements of Informal Reports, cont'd

- Summary/conclusions/recommendations
  - Restates main points
  - Conclusions
    - Objective analysis of findings
  - Recommendations
    - Suggests actions to solve problem

Using Graphics and Visuals

- Visual aids
  - May replace words
  - Make numerical information meaningful
  - Clarify and simplify complex data
  - Provide extra emphasis

Using Graphics and Visuals, cont'd

- Effective visuals
  - Clearly titled and labelled
  - Uncluttered and easy to understand
  - Accurate, functional, and ethical
  - Included for a purpose
  - Placed where they make sense

Tables

- Fit onto one page
- Include a heading
- Label all parts clearly
  o Identify units
- Improve readability by shading
- Use dashes to indicate missing data

Simple Table

Canada's Most Counterfeited Bills in 2015

Denomination	Number of Fakes
$20	10,325
$100	4,960
$5	2,008
$50	1,670
$10	1,256
$1,000	46
Total Value	$854,600

Data source: RCMP

Complex Table

Foreign Exchange Cross Rates (September 30, 2016)

	Canadian Dollar	US Dollar	Euro	Japanese Yen	British Pound
Canadian dollar	–	1.3118	1.4663	0.0130	1.7022
US dollar	0.7623	–	1.1178	0.0099	1.2976
Euro	0.6820	0.8946	–	0.0088	1.1605
Japanese yen	77.1254	101.1500	113.1160	–	131.2725
British pound	0.5875	0.7705	0.8617	0.0076	–

Data source: Bloomberg Markets

Matrixes

- Qualitative information rather than numerical data

- Used to consolidate complex information

Matrix

Aggressive-Growth Portfolio Balanced Funds

Canadian Equities	Target Weighing	Manager	Investment Objectives	Risk
Canstar True North Fund	11%	Canstar Investments Canada Limited	The fund aims to achieve long-term capital growth. It invests primarily in Canadian equity securities.	Main risk: • equity risk Additional risks:
ACA Canadian Premier Fund	9%	ACA Exmark Investments Inc.	The fund seeks to generate long-term capital growth by investing in a diversified portfolio of Canadian equity securities.	• credit risk • interest rate risk • small company risk • derivative risk
St. Lawrence Enterprise Fund	6%	St. Lawrence Financial Corporation	The fund pursues long-term capital growth while maintaining a commitment to capital protection by investing in Canadian small-capitalization equity securities.	• equity risk • liquidity risk • securities lending risk • smaller companies risk • equity risk

Pie Charts

- Each slice represents a percentage
- Whole circle = 100%
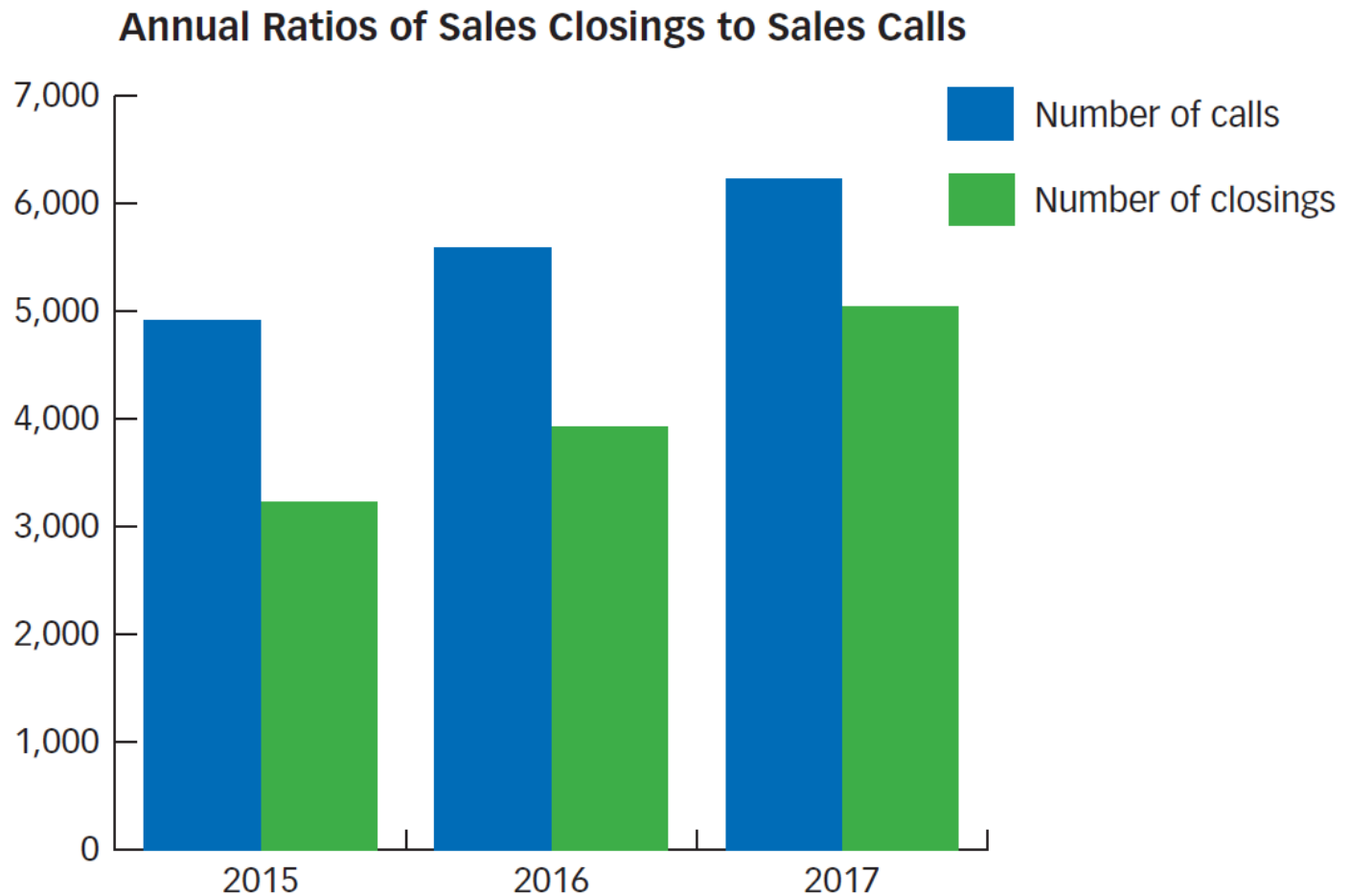- Useful to compare a segment to the whole

Pie Chart

Asset Allocation

- Stocks 45%
- Fixed Income 50%
- Cash 5%
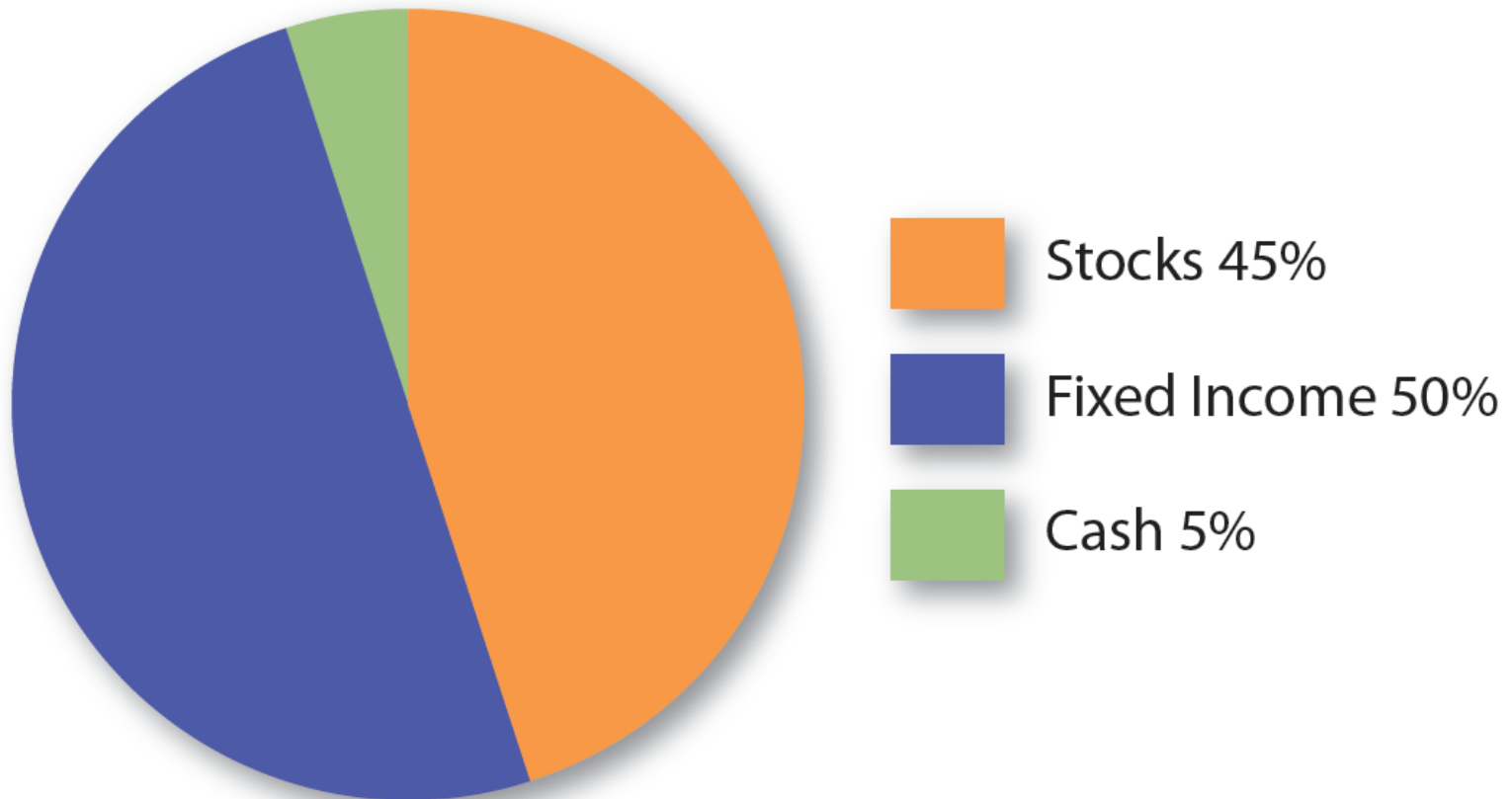
Bar Charts

- Shows comparisons
- Horizontal or vertical bars
- Bars can be segmented, divided or stacked
- Bars should be the same width
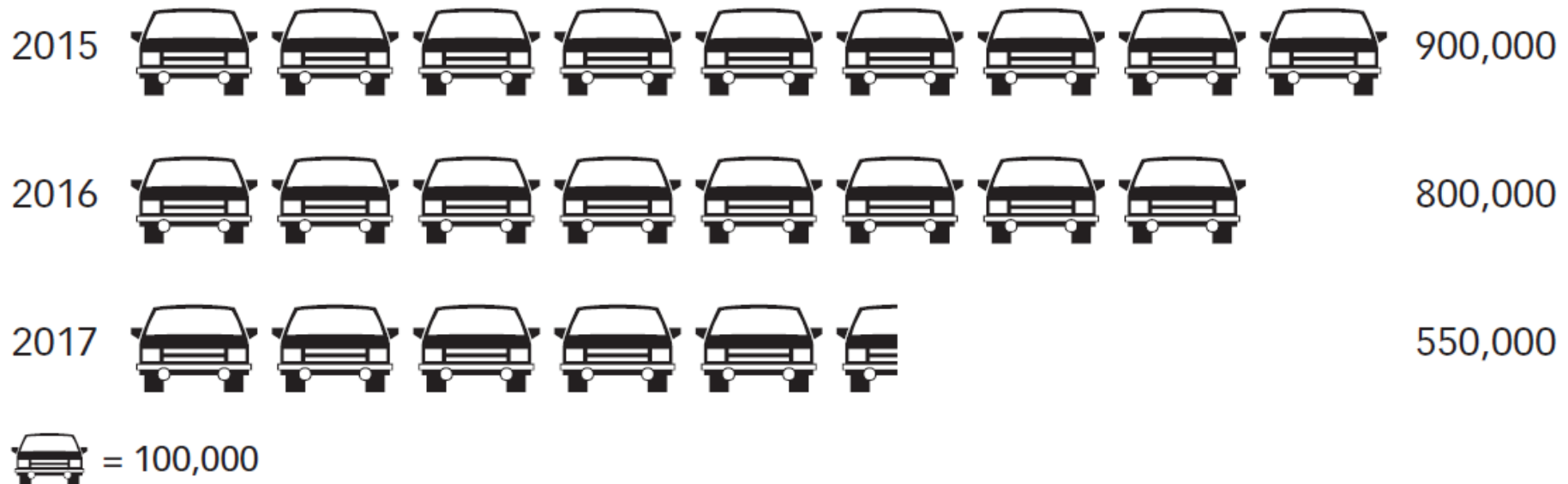
Vertical Bar Chart

Annual Ratios of Sales Closings to Sales Calls

Legend:
- Number of calls
- Number of closings

Picture Graphs

- Use pictorial symbols to represent quantities
- Arranged in bars

Picture Graph

Automotive Sales by Year, 2015–2017

2015 — 900,000
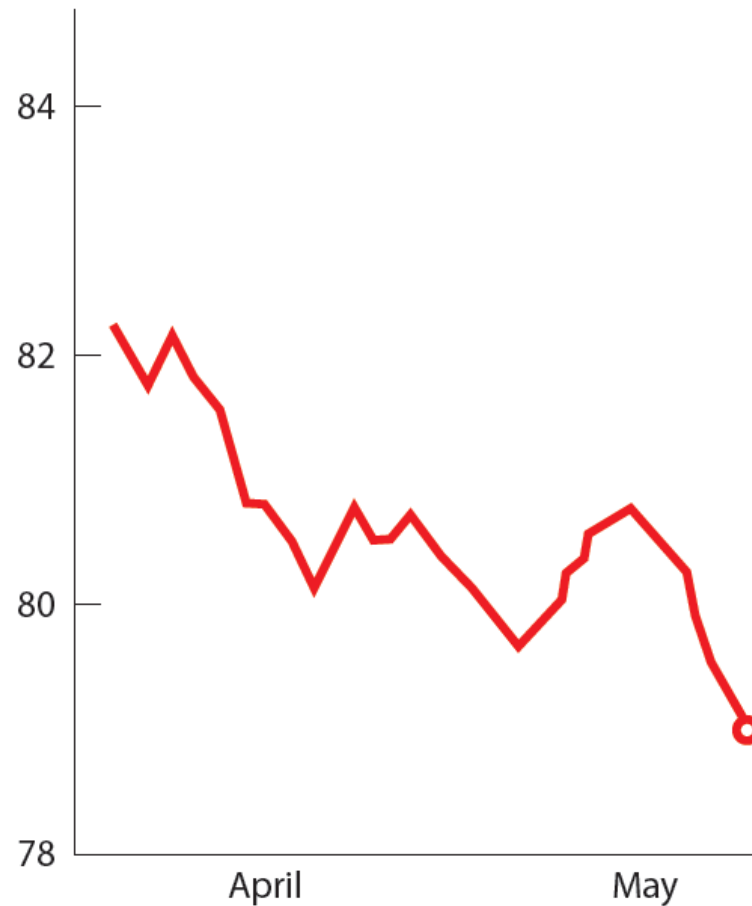2016 — 800,000
2017 — 550,000

🚗 = 100,000

Line Graphs

- Show the relationship between two variables
- Connect the dots to form a continuous line
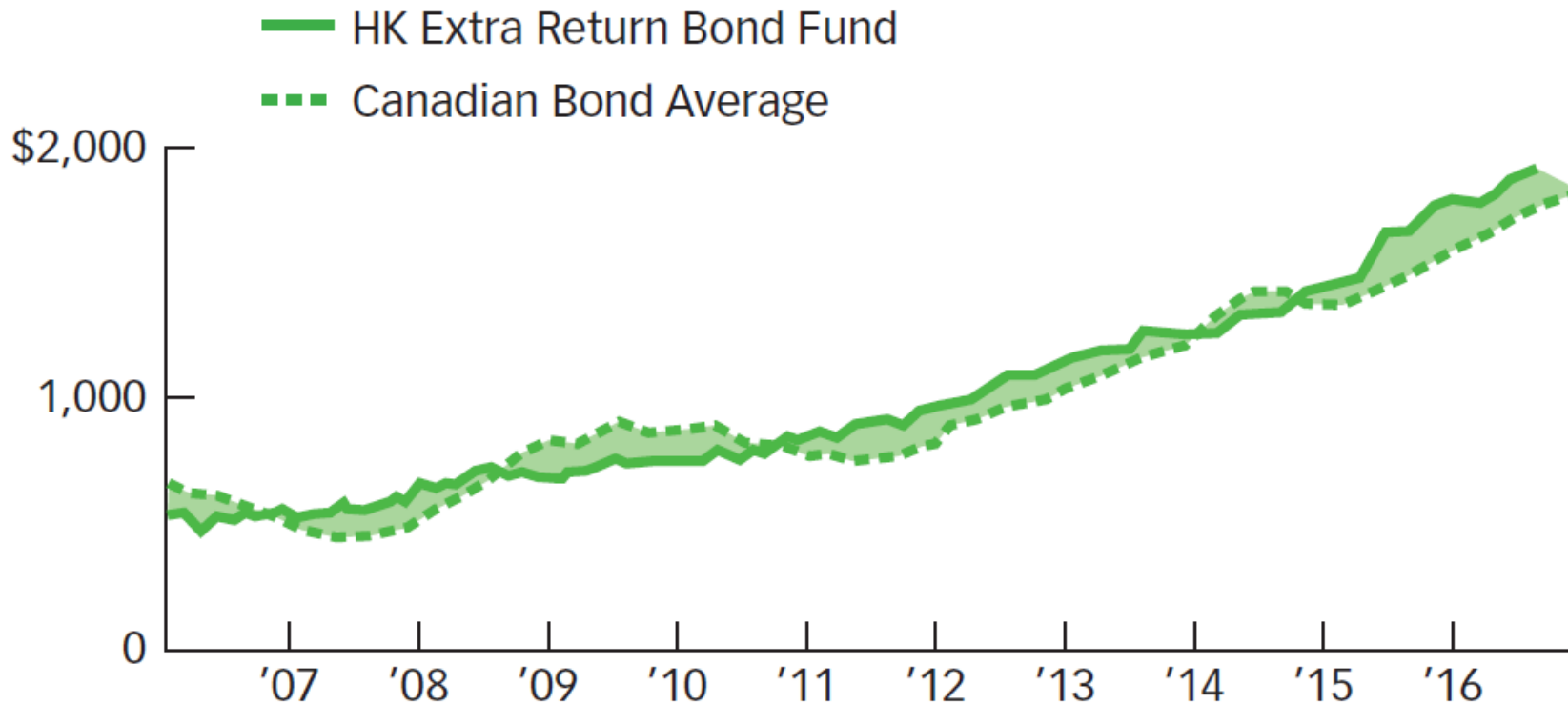- Show trends, fluctuations, or progressions over time

Line Graph

Canadian Dollar
DAILY CLOSE, US CENTS

Grouped Line Graph

Historical Compound Performance

- —— HK Extra Return Bond Fund
- ···· Canadian Bond Average

Gantt Charts

- Used for planning and scheduling projects
- Useful for blocking out periods of time

Gantt Chart

Project Development Schedule

	September	October	November	December
Research				
Planning				
Recruitment				
Training				

Flow Charts

- Map out a procedure or process
- Each shape represents a particular stage

Flow Chart

Claims Adjustment Process

Organizational Charts

- Map out the structure of a company
- Show chains of command and channels of communication
- Make it clear who reports to whom

Organizational Chart
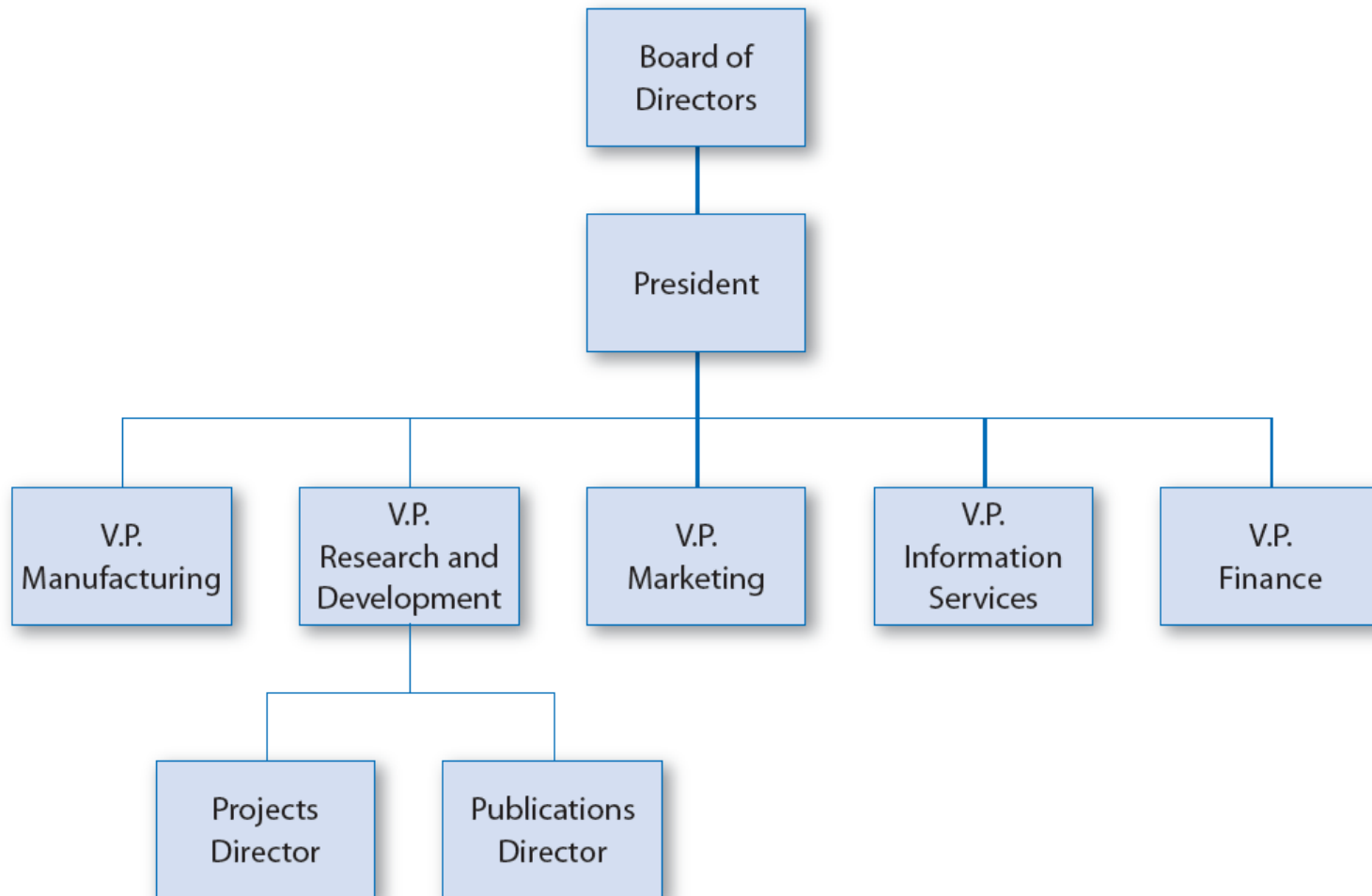
Infographics and Data Visualizations

- Visual displays to represent data and information

- Communicate complex information to a large audience

- Draw connections and highlight patterns

- Use good visual design

- Can be designed using apps

Infographics and Data Visualizations, cont'd

- Effective infographics
  - Appeal to intended audience
  - Represent information accurately
  - Make information easy to comprehend
  - Provide context
  - Support comparison
  - Make information memorable
  - Use familiar graphical representations

Infographics and Data Visualizations, cont'd

- Infographic design
  - Informative content
  - Space and simplicity
  - Focal point
  - Concise message
  - Plain font
  - Clear captions
  - Visuals > text
  - Charts for comparisons
  - Graphs for trends
  - Symbols for products
  - Floating balloons for percentages

Informational Reports

- Periodic
  - Describe recurring activities
  - Record data and outcomes
- Situational
  - Trip
  - Progress
- Incident
  - Document unexpected occurrences
  - Provide complete and accurate details of what happened

Informational Reports, cont'd

- Investigative
  - Evaluate problems or situations
  - May present facts or details, analysis, and recommendations
- Compliance
- Recommendation
- Justification
  - Show why a specific change is needed

Informational Reports, cont'd

- Feasibility
  - Evaluate projects to determine chances for success
- Summaries
  - Compress longer information
- To-file
  - Provide a permanent record of decisions or discussions
- Proposals
  - Suggest ways to solve problems (internal or external)
  - May sell a product or service

Trip/Conference Reports

- Internal report
  - Share information gained on trip
  - Present highlights
  - Be selective—organize by topic, not chronologically
  - Justify expenses

Activity Reports

- Summarize accomplishments
  - What have we done?
- Provide an update on problems
  - What needs to be looked after?
- Describe plans and current/future needs
  - What next?

Progress Reports

- Indicate if project is on schedule

- Identify any measures needed to solve problems

- Structure
  - Summary
  - Work completed
  - Work in progress
  - Work to be completed
  - Forecast

Job Completion Reports

- Ensure shared understanding of the work done

- Summarize any follow-up actions

- Structure

  - Opening

  - Background

  - Project milestones

  - Variances

  - Action

Incident Reports

- Include names of witnesses

- Write an objective description of what happened

- Document any injury or damage

- Assess the causes of the accident

- Make recommendations to prevent it from happening again

Problem-Investigation Reports

- Respond to information requests

- Document how a problem has been resolved

- Describe the issue clearly

- May include possible solutions

Summary Reports

- Collect sources and summarize the relevant points

- Include author and title to make it easy to find the original

- Do not introduce your own ideas

Analytical Reports

- Focus on how to solve a specific organizational problem

- Present information with the intent of persuading readers

- May follow an indirect writing plan

Problem Statements, Problem Questions, and Purpose Statements

- Starting an analytical report
  - Develop a problem statement or question
  - Decide what type of report should be written
  - Write a purpose statement
    - What is the scope of the investigation?
    - Are there any limitations (time, budget, etc.)?

Justification/Recommendation Reports

- Internal, persuasive documents
- Use evidence to build a case for the recommended solution
  - Direct or indirect writing plan
- Include possible alternatives
  - Explain why these options don't work

Feasibility Reports

- Examine the risks associated with a new project
- Use a direct approach
  - Announce whether the project is workable at the beginning
  - Present the rationale to back up the decision

Comparison/Yardstick Reports

- Compare two or more options

- Identify specific evaluative criteria

- Rank the options if possible

- Recommend the option that fits the criteria best

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Social Media and Mobile Communication

Embracing Social Media

- Canadians are heavy users of social media

- Benefits to businesses
  - Spreads awareness and information about products
  - Promotes communication and relationships
  - Provides purchasing venue and feedback on purchases

- Benefits to consumers
  - Access to product information and products
  - Consumer support

Web 2.0 and the New Media Landscape

- **Social media:** The interactive Internet- and mobile-based tools and applications that allow users to post and exchange information in real time, facilitating connection, collaboration, and creation of user-generated content

Web 2.0 and the
New Media Landscape, cont'd

- Web 2.0
  - Connection, engagement, participation
  - Blogs, wikis, social networking, online communities
  - Participants take various roles
    - Creators
    - Critics
    - Collectors
    - Joiners
    - Spectators

What Is Participatory Culture?

- Elements of participatory culture
  - Low barriers to creative expression and civic engagement
  - Support and mentorship among members for each other's creations
  - Feelings of social connection between members and belief that their contributions matter

What Is Participatory Culture? cont'd

- Participatory culture activities
  - Affiliation
    - Join online groups
  - Expression
    - Produce new creative content
  - Collaborative problem-solving
    - Work in formal or informal teams
  - Circulations
    - Shaping the flow of media through blogging etc.

What Is Participatory Culture? cont'd

- New media literacy skills
  - Judgement
    - How credible and reliable is the information?
  - Networking
    - Where can I find the information? To whom should I pass it on, and in what form?
  - Collective intelligence
    - What information can we collect together? How do these stories compare?

What Is Participatory Culture? cont'd

- New media literacy skills, cont'd
  - Transmedia navigation
    - What are sources on other media platforms saying about this issue?
  - Appropriation
    - How does all this conflicting information fit together? What's the big picture?
  - Negotiation
    - How do I react respectfully to those with other perspectives or from other cultures?

What Is Social Media?

- Immediate and spontaneous online communication
  - Share events as they happen
  - Intimate and conversational

What Is Social Media? cont'd

- Users express a distinct online image or identity
  - Posting and sharing information
  - Conducting conversations with others
  - Delivering and exchanging media content
    - Stories, facts, documents, videos, photos—"rich" content

What Is Social Media? cont'd

- Business uses of social media
    - Generate traffic
    - Develop a following
    - Attract recruits
    - Create brand awareness
    - Facilitate interaction and engagement
    - Generate revenue
    - Respond to crises

What Is Social Media? cont'd

- Benefits of social media use for businesses
  - Improved customer care
  - Increased customer interaction
  - Decreased marketing costs
  - Better employee engagement
  - Positive organizational culture

Types of Social Media

- Blogs
- Micro-blogs
- Podcasts
- Social networking sites
- Photo- and video-sharing sites

Blogs

- Topical, timely content
- Personal perspective on a topic
- Addresses needs and interests of readers
- Reverse chronological order

Blogs, cont'd

- Intranet or internal company blogs
  - Share company news
  - Boost morale
  - Highlight employee accomplishments

Blogs, cont'd

- Corporate blogs
  - Write about topics that matter to consumers
  - Educate customers about trends and industry news
  - Provide a more personal and reader-focused perspective
  - Can include photos or video

Blogs, cont'd

- Blogging guidelines
  - Write consistently
  - Identify a valuable niche
  - Check out the competition
  - Treat your posts as articles
  - Aim for authority and credibility

Blogs, cont'd

- Blogging guidelines, cont'd
  - Determine the right type of post
    - Instructional
    - Cheat sheets
    - Media
    - Spotlight
    - News
    - Newsjacking

Blogs, cont'd

- Blogging guidelines, cont'd
  - Be authentically yourself
  - Add media
  - Optimize keywords
  - Invite interaction

Micro-Blogs

- Business uses of Twitter
  - Promote products, services, and brand awareness
  - Monitor competition
  - Monitor customer satisfaction
  - Share and find knowledge and resources
  - Watch industry trends
  - Prospect and engage new customers
  - Connect with employees and prospective employees

Micro-Blogs, cont'd

- Twitter guidelines
  - Be professional and likeable
  - Ask questions and respond in real time
  - Use the right format
  - Be selective in what you tweet
  - Be selective in who you follow
  - Make your content accessible and shareable

Micro-Blogs, cont'd

- Twitter guidelines, cont'd
  - Retweet followers' posts
  - Use hashtags
  - Incorporate photos and links
  - Drive traffic to your blog or website
  - Connect with users in your area
  - Be strategic about pace and timing

Podcasts

- Audio files for streaming or downloading

- May be episodes in a series

- Can be used to educate consumers

Podcasts, cont'd

- Podcast guidelines
  - Use a professional-quality recording app
  - Follow a loose script
  - Avoid going solo
  - Seek out and engage with followers
  - Find an appropriate style

Social Networking Sites

- Facebook, Google+, LinkedIn
- Encourage "word of mouth" marketing
- Create communities of people interested in the brand
- Publicize and promote events and products
- Carry out marketing research

Social Networking Sites, cont'd

- Facebook guidelines
  - Choose privacy settings with care
  - Update the page frequently
  - Stay on topic
  - Keep posts simple and relevant
  - Keep the design clean

Social Networking Sites, cont'd

- Facebook guidelines, cont'd
  - Be accurate
  - Keep the tone spontaneous and informal
  - Signpost your company's expertise
  - Interact through polls, promotions, surveys, questions
  - Give followers exclusive content

Social Networking Sites, cont'd

- LinkedIn guidelines
  - Customize your URL
  - Make your profile public
  - Complete your profile
  - Stay active

Social Networking Sites, cont'd

- LinkedIn guidelines, cont'd
  - Connect and network
  - Ask for recommendations
  - Stay informed

Photo- and Video-Sharing Sites

- YouTube, Vimeo, Pinterest, Instagram, Flickr

- Share company announcements, photos, videos, and speeches

- Use for employee recruitment

- Capture customer feedback

- Promote company engagement through contests

User-Generated Content

- Consumers are eager to develop and share original content online

- Businesses base campaigns on this type of consumer engagement
  - Burberry "Art of the Trench"
  - Starbucks "White Cup Contest"

User-Generated Content, cont'd

- Best practices for user-generated content
  - Choose a promotion with your audience in mind
  - Look for marketing potential
  - Offer an enticing award
  - Make participation simple and straightforward
  - Ensure the legality of what you propose and offer

The Social Media Advantage

- Good way to reach Canadians
- Connect with current and potential customers
- Track what the public is saying about your brand
- Use for recruitment and employee communication
- Organize events, drive website traffic, and fundraising

The Risks and Challenges of Social Media

- Lost employee productivity

- Potential damage to professional reputations
  - Employers may search for employee information

- Lack of control over brand reputation
  - Employees and customers may share negative comments

  - Poorly judged campaigns may backfire

- Legal issues

Measuring Social Media Performance

- Social media analytics
  - Consumption/reach
    - How many followers and readers?
  - Sharing/engagement
    - Number of comments, what content is shared, how often is it shared?
  - Conversion
    - How many audience members become paying customers?

Mobile Communication

- Limitations of mobile devices
  - Variety of different types of devices
  - Smaller screen sizes and different user interfaces affect readability of messages
  - Zooming and scrolling divert attention from content