



Report writing: Purpose and types

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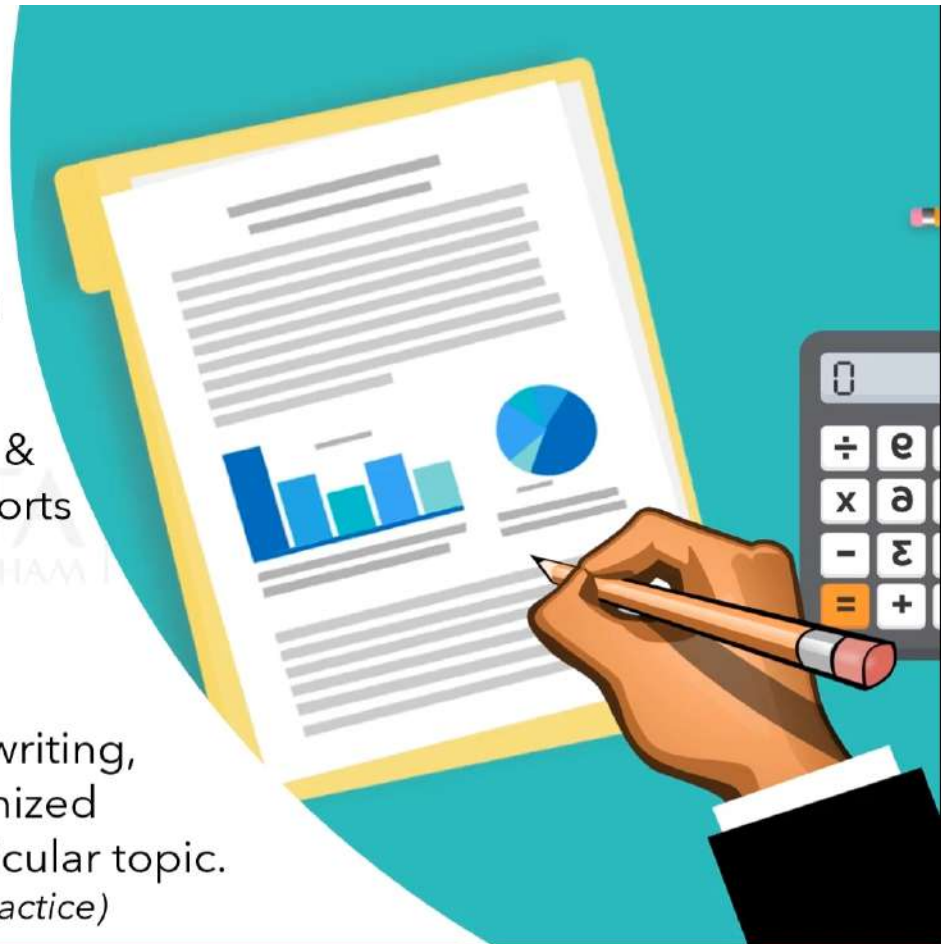
Learning objectives

- Understand the meaning and purpose of a business report
- Know the various types of business reports



Introduction to business reports

- One of the most sought-after skills in corporate sector
- Decisions that are strategic in nature & posing long term impact require reports
- Committees meet from time to time and work out detailed plans
- A report is usually a piece of factual writing, based on evidence, containing organized information and/or analysis of a particular topic.
(*Technical Communication: Principles and Practice*)



Purpose of business reports

- To assist in decision making
- To convey information
- To providing actual solutions
- To assist in future planning
- To understand a business model
- Understand the purpose of a report
 - to provide information alone
 - to provide evaluation & suggestions
- The purpose of a report should be specific



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Audience of business reports

- Purpose and audience determine the formality, structure, and type of a report
- Audience's awareness about the issue of report, educational background, hierarchical position, decision making power, responsibility & authority etc.

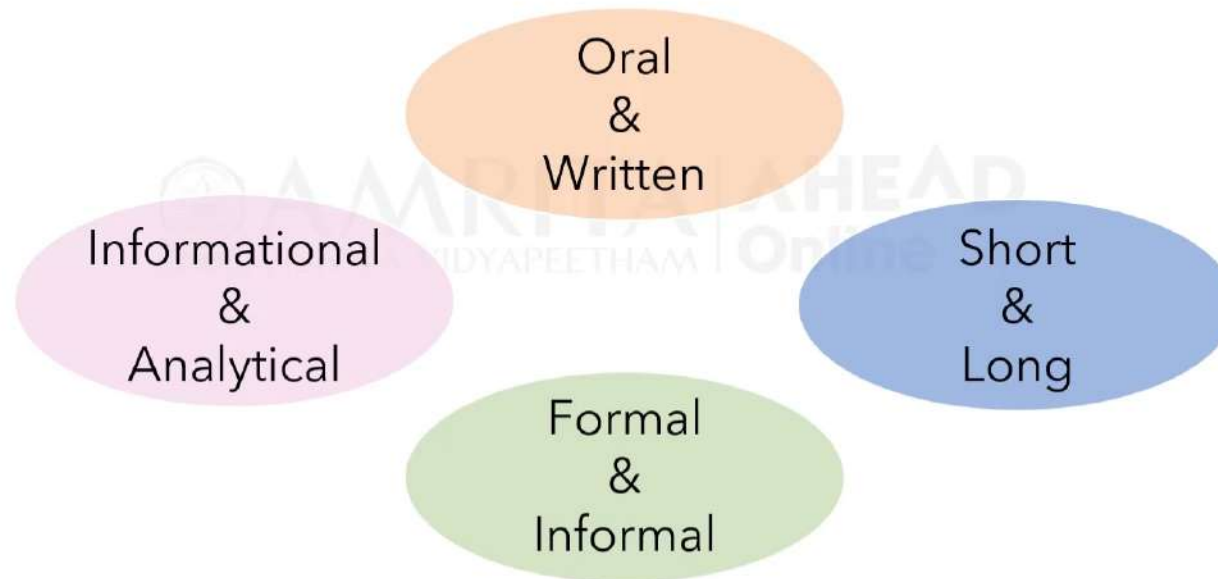
Primary audience
people who have to
take a decision
based on the report

Secondary audience
people who are at
the receiving end of
the actions taken by
the above group

Immediate audience
people with the
responsibility to
evaluate and
circulate the report



Classification of business reports



Types of report

1. Feasibility reports

Before undertaking a new project or starting an establishment

Analyze the pros and cons, gains and glitches

Availability of resources, manpower, budget, opportunities etc.

Is the project feasible, not feasible or partially feasible?

Types of report

2. Progress reports

To show the progress and accomplishments of a project

To decide whether the project is heading towards the right direction

Gives an idea about what has been done and how much is remaining

Mentions the task assigned, work in progress, future course of action, expected date of completion

Types of report

3. Trip and Contact reports

fall in the category of informational reports

employees of the company visit the client or any other stakeholder

mention the itinerary, persons contacted, a summary of all decisions & discussions

Mention about the value addition and worth of such trips or contacts

Types of report

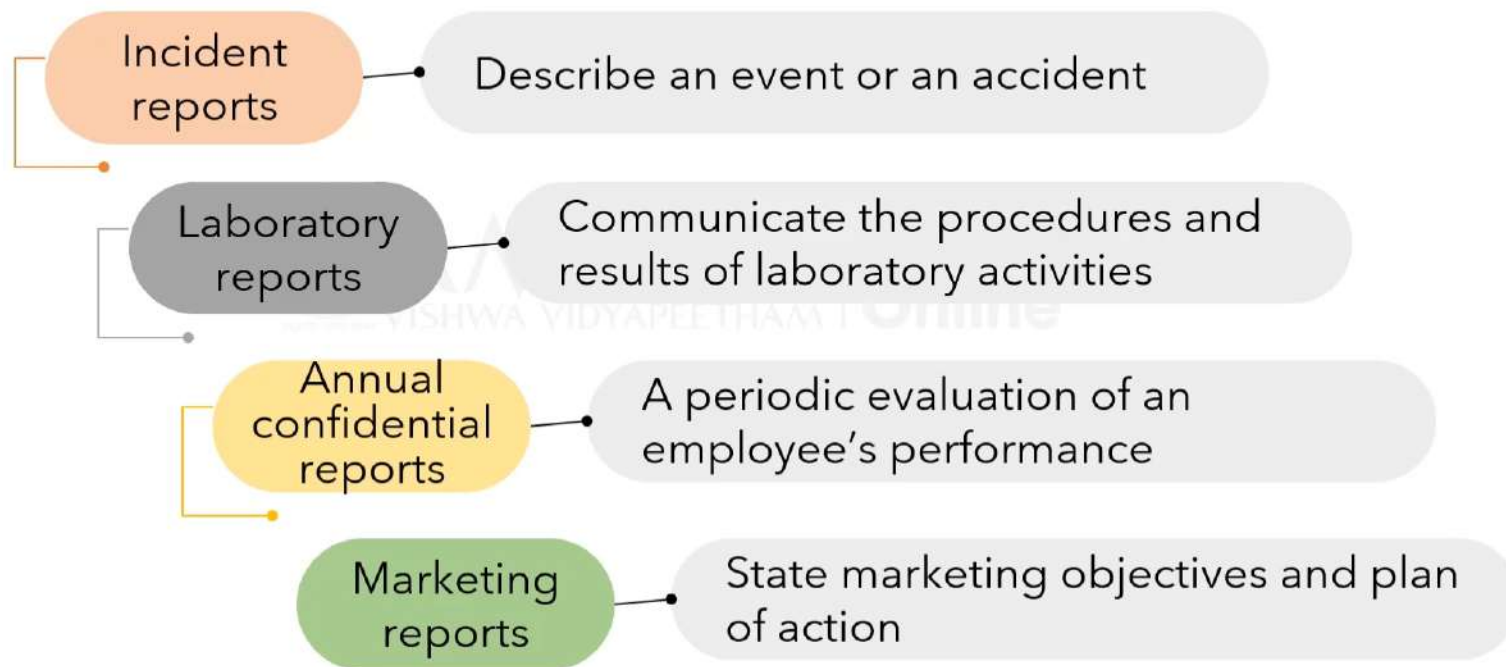
4. Compliance reports

For disclosing whether an organization is abiding by laws

Present data indicating procedures followed and outcome

Correctness of data has to be emphasized

Types of reports



To sum up

- A report is a basic management tool.
- It is important to determine the purpose and the audience of business reports.
- Business reports can be classified as oral, written, informational, analytical etc.
- There are different types of reports.





Format of a report

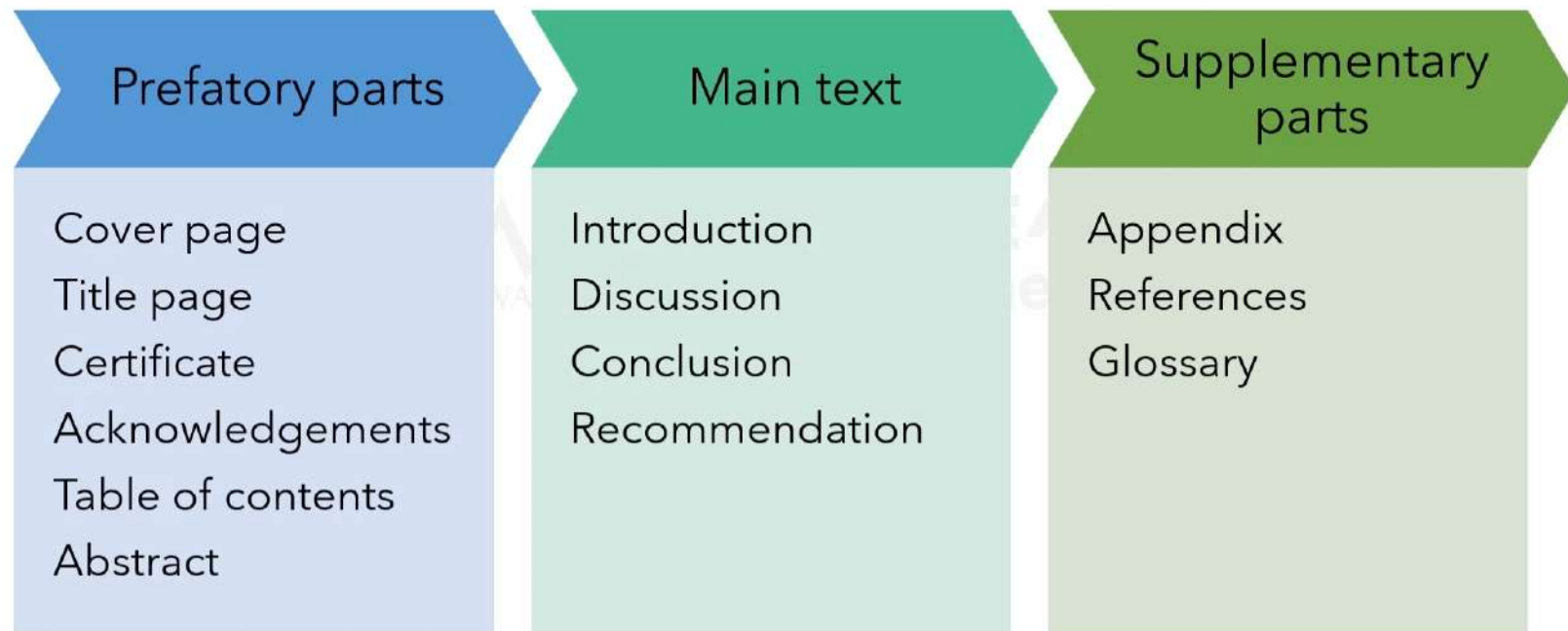
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Learning objectives

- Study the format in which reports can be presented
- Learn the tips for drafting, editing and proofreading a report.



Parts of a business report





July 2015

Oklahoma Capitol Restoration Project



Interior Rehabilitation
Monthly Progress Report



1. Cover page

- Gives an elegant appearance like the cover of a book
- Details of the topic and the author
- Report number & classification
- May add illustrations, logos, photographs, drawings, diagrams etc.
- Organizations may have standard format



LIGHT WATER NUCLEAR REACTORS

submitted to

Mr. David A. McMurrey
Energy Research Consultants, Inc.
Austin, Texas

April 27, 19XX

by
Jeffrey D. Lacruz

This report examines light water reactors as a possible alternative source of energy for Luckenbach, Texas. Both types of light water reactors are described, and an explanation of how each reactor produces electricity is presented. Safety systems and economic aspects conclude the main discussion of the report.

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2. Title page

- Similar to a cover page
- Label, report, features title, author, affiliation, date, and sometimes for whom the report is prepared

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3. Table of contents

- A list of the main parts of the report and their respective page numbers

Abstract: Adequate health care services are often not available in rural and remote areas, and this problem is expected to grow worse in the near future. [Topic/Significance] “Telehealth” interventions represent a strategy for addressing access to care problems.[RQ] We examined and compared attitudes toward medical and mental health care delivered via telehealth applications among adult rural ($n = 112$) and urban ($n = 78$) primary care patients. We also examined attitudes toward telehealth applications among a subset of patients with posttraumatic stress disorder (PTSD)—a group likely in need of specialized services.[Method] Both urban and rural patients were receptive to receiving medical and psychiatric services via telehealth. There were few meaningful differences across variables between urban and rural patients, and there were no meaningful differences by PTSD status.[Results] These findings support the feasibility of telehealth applications, particularly for rural patients who may not otherwise receive needed services.[Discussion]

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4. Abstract

- Highlight the topic, methods, data, and statements of conclusion or recommendation
- 7-8% of the entire report
- Avoid technical terminology



Introduction

1

Prepare the reader to receive the report

2

Use self-judgment

3

Place yourself in the shoes of the reader

4

Do not assume that the reader knows everything

Introduction



Background- How did the idea develop?



Purpose and scope- What is this report for?



Personnel- Who all are involved?



Authorization- Who authorized you?



Methodology- How is the study done?



Body/Discussion

01

Longest part of any report- 80%

02

Information that supports the conclusion

03

Analysis, logic, interpretation of different aspects

04

Tables, charts and other graphical representation

05

Subheadings to document the activities

Body/ Discussion



Methodology- Specific analysis based on accepted research methods



Data presentation- tabular, pictorial, graphical, textual



Results- presentation of results of the study



Analysis- Analysis of the data and recommendations based on that analysis



Conclusion



Concise presentation of findings



Main results and their relation to recommended action or outcome



Uses decreasing order of importance



Does not introduce any new idea not previously mentioned.



Recommendation



Action to be taken as a result of the report



Aimed towards accomplishing the purpose of the report



Helps the reader to take important decision or solve problems



Given usually when it is solicited and when you have the authority



Supplementary parts

- Provide additional details to interested readers
- Data which cannot be included in the main body



Appendices- sample documents, detailed calculations, specimen questionnaire, samples etc.



References- list of sources, books, magazines, newspapers, internet etc.



Glossary/Index- list of technical words used and their explanations



Writing the report



Data collection



Analysis



Findings



Writing



First draft



Review



Editing



Proofreading

To sum up

- The structure of a report can be broken down into prefatory, main text and supplementary parts.
- Some of these are optional elements.
- Preparing a report with utmost care is important.





Business proposal

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Learning objectives

- Understand the main goals of a business proposal.
- Learn the types of business proposals.
- Understand the strategies to use in a business proposal.





What is a business proposal?

Business proposals are documents designed to make a persuasive appeal to the audience to achieve a defined outcome, often proposing a solution to a problem.



Business proposals
are crucial in today's
competitive business
environment.

Purpose of business proposals

A proposal is a persuasive message, aimed to promote services and products to a client in an effective way.



Construction purposes



Conduct surveys



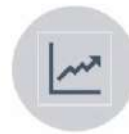
Sales of properties



Upgradation of existing facilities



Provide training to employees



Improvement of performance



Types of business proposals

Solicited proposals

- You will be asked to submit a proposal
- request for proposal (RFP), call for proposal (CFP), request for quotation (RFQ), and invitation for bid (IFB)
- The product or service, guidelines for submission & evaluation criteria will be specified

Unsolicited proposals

- Unsolicited proposals are the "cold calls" of business writing.
- A thorough market understanding is necessary
- Can be general or tailored to suit your audience
- Often considered as marketing materials

Idea

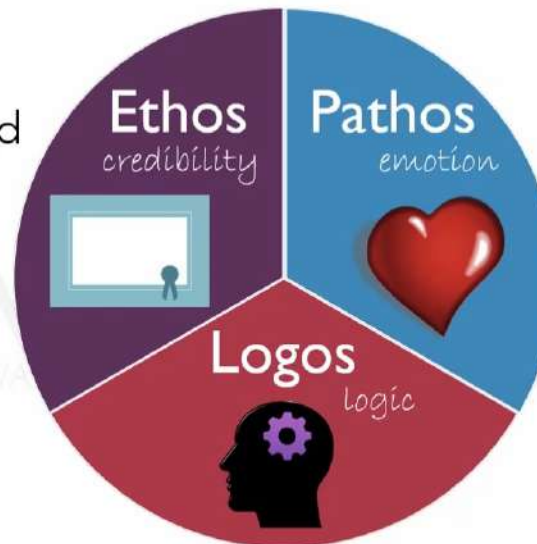
- Effective business proposals are built around a great idea or solution.
- What makes your idea different or unique?
- How can you differentiate yourself from the rest by underscoring long-term relationships, demonstrated ability to deliver, or the ability to anticipate the company's needs?



idea → plan → action

Ethos, pathos and logos

Who are you and why should we do business with you?
Reference previous clients, demonstrate order fulfillment



Are you enthusiastic about your idea?
How does your solution stand out in the marketplace?

Why the claims you make are true?
Are the claims relevant? Do they support your central assertion that your product or service is right for this client?

Persuasion is the key

- Convince the reader that their needs would be met with
- Be more creative than other forms of professional writing
- Keep the customer's convenience and requirements in view
- Present neatly and aesthetically
- Anticipate possible reasons for rejections and provide suggestions
- Use plain, direct and unambiguous language

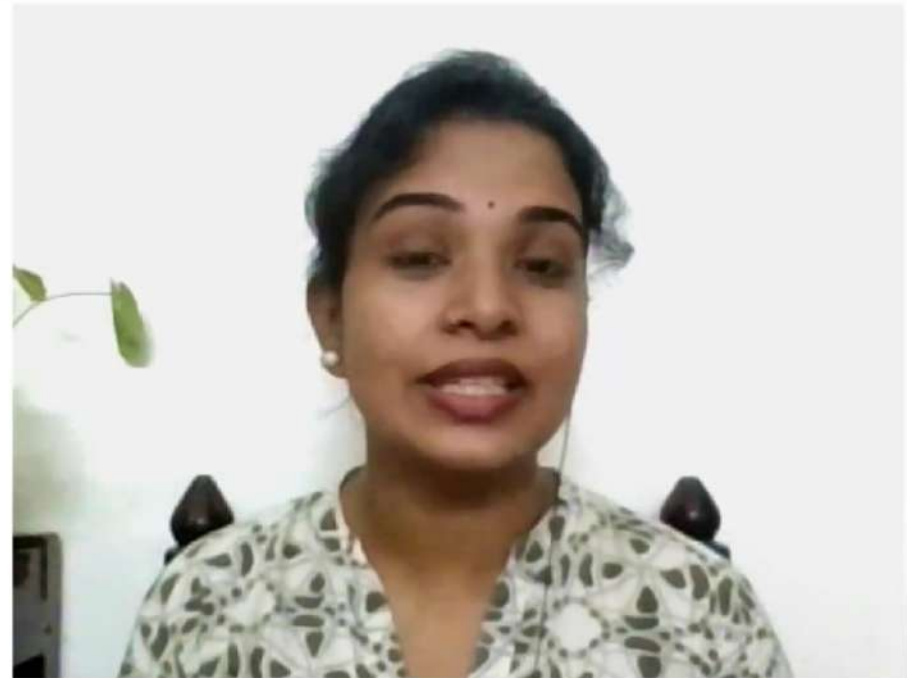


The seller's ideas should meet the customer's expectations.

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Summary

- Business proposals are formal and persuasive documents to offer solution
- There are solicited and unsolicited proposals.
- The idea should have the elements of ethos, pathos and logos.
- Persuasion is the key to winning contracts.





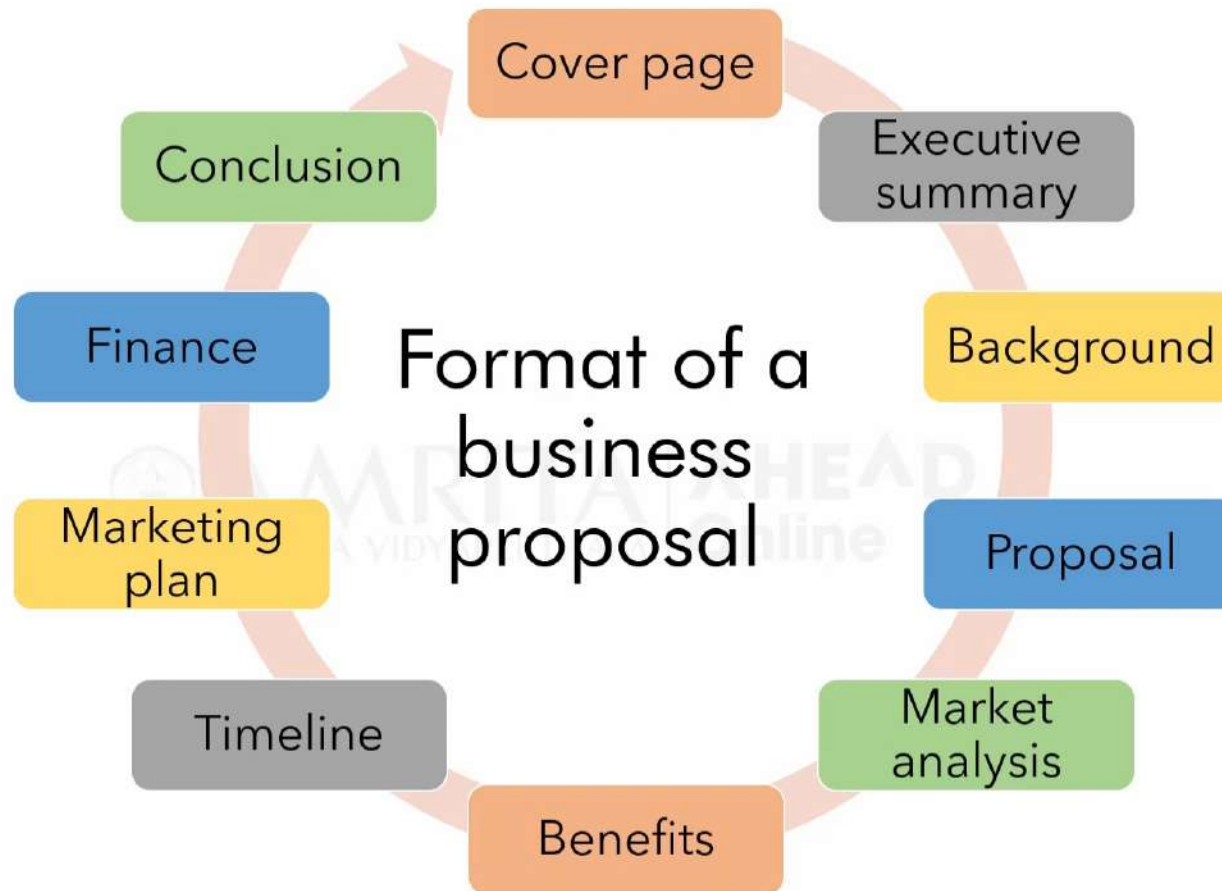
Format of a business proposal

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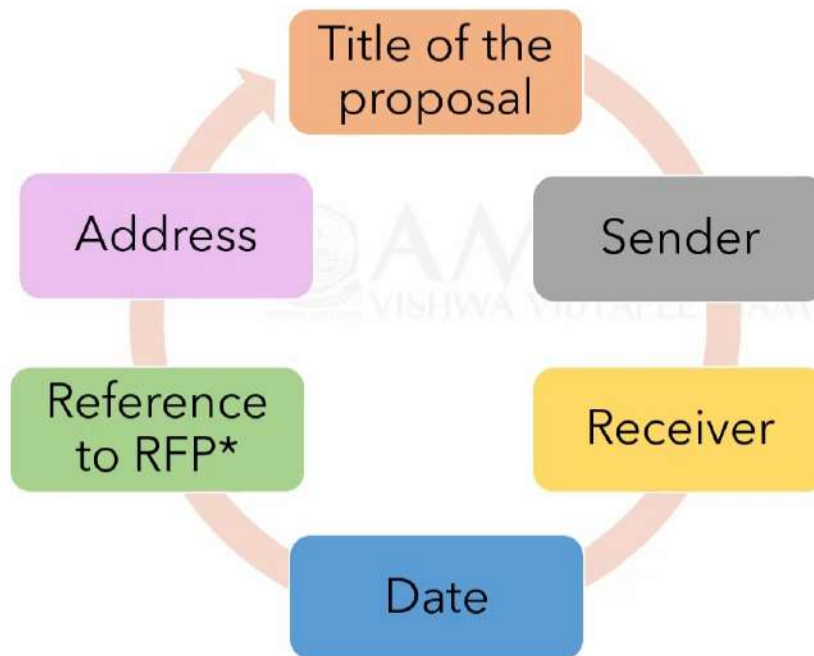
Learning objectives

- Understand the main structural elements of a business proposal.
- Learn how to draft and style a proposal.





Cover page



A template for a business plan cover page. The page is light grey with a decorative border. The text is as follows:

Company Name
PLACEHOLDER

YOUR COMPANY NAME

Business Plan

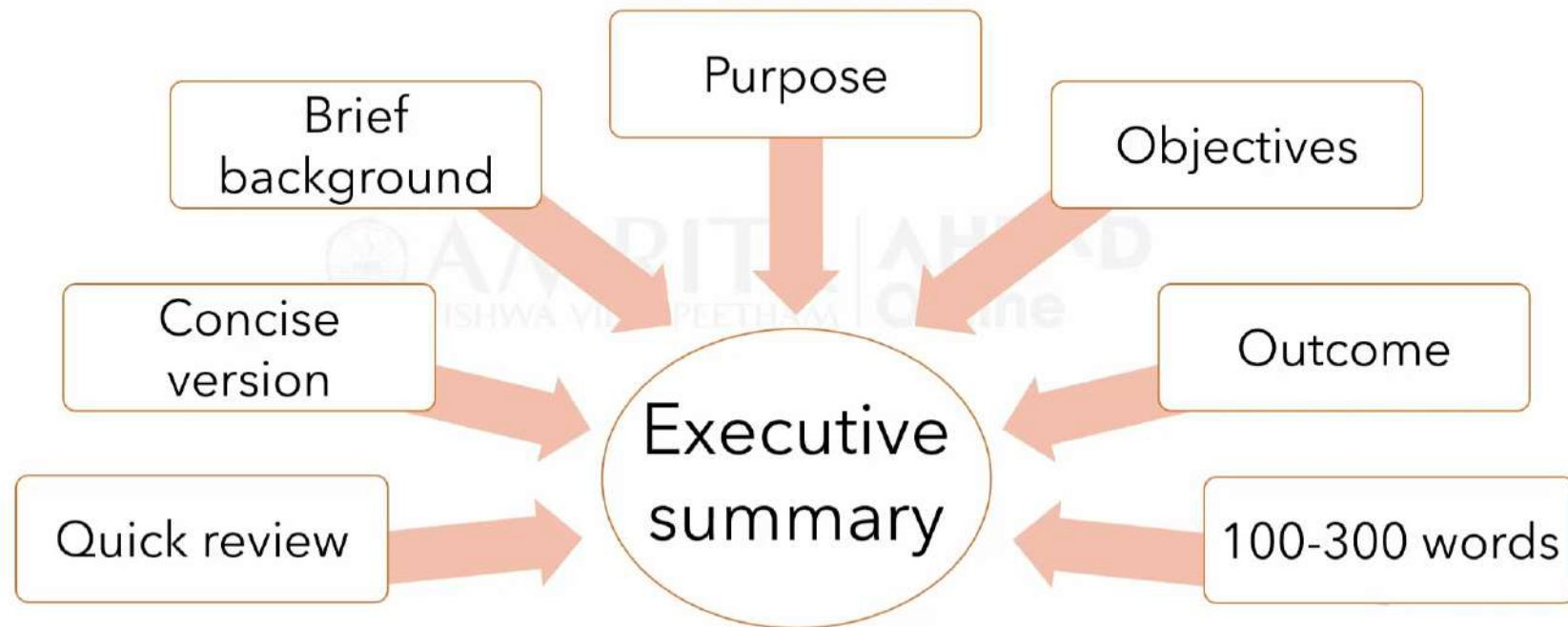
March 18, 2015

For
COMPANY NAME

Street Address Here, City, State & Zip Code
(123) 456 7890
example@fake-email.com
www.examplecompay.com

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Executive summary



Background



- Discuss the history of your product, service, and/or company
- Previous work completed on related projects
- Focusing on the relationship between you and the potential buyer and/or similar companies

Proposal



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- The idea.
 - *Who, what, where, when, why, and how.*
 - Make it clear and concise.
-
- Don't waste words, and don't exaggerate.
 - Use clear, well-supported reasoning to demonstrate your product or service.

Market analysis

What currently exists in the marketplace, including competing products or services, and how does your solution compare?



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Benefits

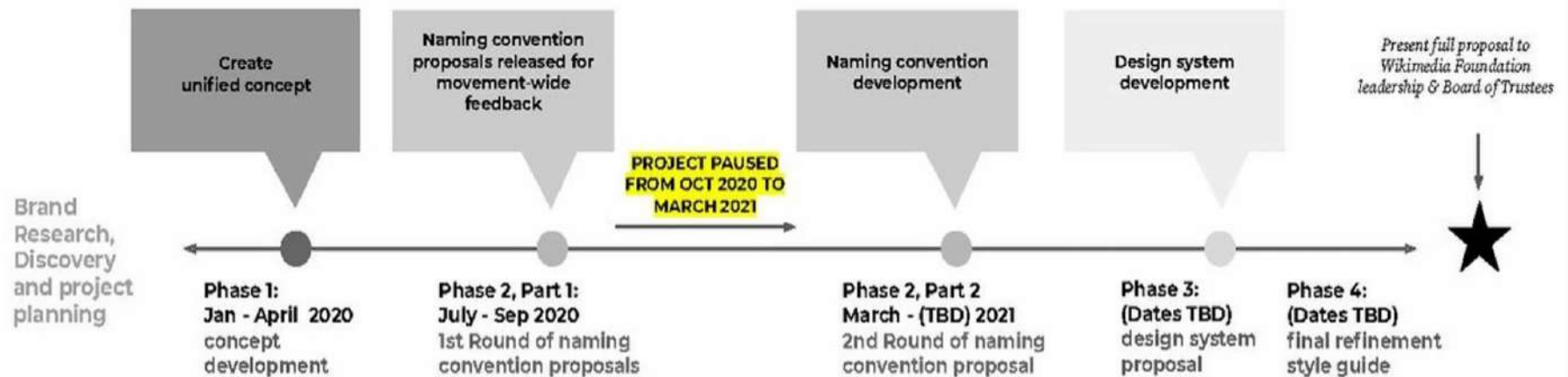


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- How will the potential buyer benefit from the product or service?
- Be clear, concise, specific
- Provide a comprehensive list of immediate, short, and long-term benefits to the company.

Timeline

- A clear presentation with visual aids, of the process, from start to finish
- Use milestone charts or Gantt charts
- Facilitates a systematic approach



2030 Movement Brand Project

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Marketing plan

- How will people learn about you?
- How do you plan on marketing your product or service or company?



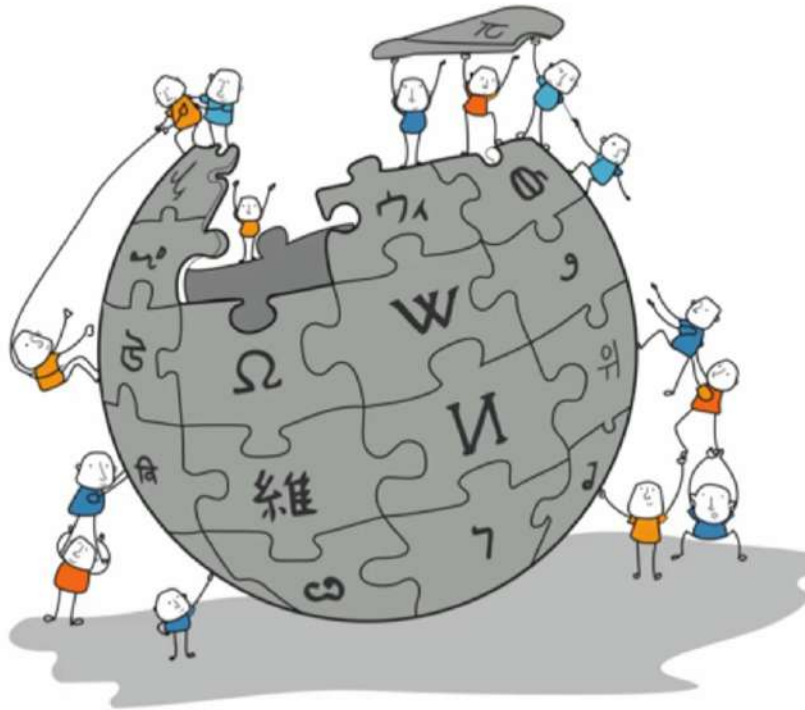
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Budget



- Breakdown of costs- materials, supplies, salaries, travel, consumable items etc.
- What are the initial costs?
- When can revenue be anticipated?
- When will there be a return on investment?

Conclusion



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- Final opportunity to re-emphasize and persuade the recipient
- Tie them together with a common theme and make your proposal memorable.
- No new ideas should be added.

Style and appearance



- Physical appearance creates an important non-verbal impression
- Neatness, appearance of table of contents, list of figures, title page, consistency of style, completeness
- Visual persuasion

To sum up

- Business proposals are always written in formal and persuasive language.
- They include standard structural elements.
- Style and appearance are as important as the content.

