Report Writing

Free sample chapter

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FREE SAMPLE CHAPTER

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Reports 101: How do I begin?

Chapter 1

What is written without effort is, in general, read without pleasure.

Samuel Johnson

Rationale

- It is far easier to inform or persuade your readers if you understand *who* they are, *why* they want your report, *what* they already know and *how much* they want.
- If you just guess at this information, you're likely to write for the wrong people, provide the wrong information and/or pitch it at the wrong level.
- It follows that it's sensible to spend time researching your readers' identities and needs *before* you try writing for them.
- Taking the trouble to write a *good* report, not just a mediocre one, generates benefits for all parties: you, your readers, your organisation and your organisation's clients.

Objectives

You will be able to complete these tasks:

- Explain the importance of identifying your readers and their needs.
- Identify how much detail your readers need and will understand.
- Interview readers in a style that encourages them to identify their needs.
- Create a needs-analysis table to organise who needs what.
- Describe a strategy for providing information to diverse groups of readers with different needs.
- Describe a strategy for dealing with conflicting needs.

1.1 What's a report?

So you've been asked to write a report, and perhaps you're feeling a bit lost. The good news is that the process of report writing is one that can be easily learned. Let's start with a definition:

> A report is a document that provides detailed information about a subject. Some reports may also offer expert opinions and advice.

Okay then. You'll be offering your readers information and, perhaps also, opinions and advice. Before you can start to write a successful report, it's critical to do the necessary preparation. At a minimum, this requires taking the time and effort to get good answers to these questions:

1. *Who* will read my report?
2. *Why* do my readers want my report?
3. *What* will my readers understand?
4. *How detailed* do my readers need it be?

Let's consider these separately.

1.2 Q1. Who will read my report?

Let's say that your manager asks you to write a short report detailing the most common types of customer complaints for the past year and their causes.

Consider the possible readership that such a report may be destined to have:

1. The report may be for your manager only.
2. The report may be for your manager and the CEO.
3. It may also be put on your intranet so that your staff can read it.
4. It may also be put on your web site so that your staff and the public can read it.

Would you write the same report in each of these cases? Certainly not.

Consider just two of the issues involved:

Privacy: Some of the complaints may name specific customers or staff. Privacy legislation may require this information to be kept confidential. It may be appropriate for *you* to view these names in order to write your report. It may also be appropriate for your manager and the CEO to see them. Making these names widely available via your intranet or the Internet, though, would probably be quite inappropriate.

Politics: If some of the complaints are critical of your manager, you may choose to write your report differently if you know that it will be passed along to the CEO.

The audience for your report should greatly influence what you write (or don't write). It follows that you can't begin to write your report until you know who's going to read it.

Discussion

1. The example above identified several individuals or groups who might read your reports: your manager, your CEO, other staff (via the intranet) and the public (via the web). What other individuals or groups might you be writing for?
2. The example above identified privacy and politics as two factors that might influence what you put into a report or even leave out of it. What else may influence the content of your report?
3. How realistic is it in your workplace to expect that you can know in advance who you're writing for?

1.3 Q2. Why do my readers want my report?

Let's consider another situation. You're asked to write a report for your local council. The report will describe the levels and probable causes of pollution in a local lake. Consider some of the people who might want to read your report:

- environmental scientists;
- local residents;
- council managers with responsibilities for budgeting;
- town planners.

The media may also obtain and read your report. While they are not your intended audience (usually), it may be wise to keep them in mind while you write.

Each of these individuals or groups may have very different interests in the issue. For instance:

- The environmental scientists may want your report to contain the technical information they give you.
- Local residents may want it to be short and in plain English.
- The council managers who have to prepare next year's budget may want your report to spell out exactly how these issues will affect costs and budgets.
- The town planners may want your report to indicate any necessary changes to drainage.
- The media may search your report for indications of inefficiency or poor planning.

In practice, every reader (or group of readers) may have different needs that they wish to see reflected in your report. So …

Once you know <u>who</u> will read your report, for each of these people (or groups), you have to identify <u>why</u> they want it.

In other words, we have to set *goals* for the report that are based on the *needs* of the people reading it. We'll discuss shortly how to go about getting this information.

Discussion

1. What are some of the needs you've had to satisfy with past reports?
2. How easy is it to learn what people want from your reports?
3. How realistic are people's expectations of what you can deliver (and when)?

1.4 Q3. *What* will my readers understand?

Imagine that a colleague asks for your advice on a purchasing decision — be it for a PC, a car, a house or a pet. Ideally, what level of detail should you provide in your answer?

1. I'd pitch my answer at a level I found technical. They can always find out what it means later.
2. I'd pitch my answer at a level I found simple in order to be certain that it didn't go over their heads.
3. I'd pitch my answer at a level I found moderate.
4. I'd pitch my answer at the level that was easiest and fastest for me to complete.

Let's consider choices 1 and 2. If you provide a very technical answer, you risk pitching the answer too high, and your colleague may not understand your advice. Similarly, if you provide a simplistic answer, you risk pitching the answer too low, and your colleague will learn little or nothing.

It may be tempting to choose answer 3 and say that it's reasonable to pitch your answer at a 'moderate' level; that way it's likely to be about right. But how do you know what level your colleague will find moderate? If you're an expert on the topic, your guess about what constitutes moderate is likely to be too high. And if your colleague knows more than you realise, it may be too low.

Answer 4, while seemingly absurd, may be the most common choice, in practice. Unless we carefully go through this process of identifying the needs of our readers, we risk answering in a way that requires the least effort for us.

We're left, as you may have suspected, with *none of the above.* Of course, you'd try to pitch the answer at the level that best suited your *reader's* level of knowledge, not your own. Naturally, you can't know what this is without first discovering how much he or she already knows.

Discussion

- Consider a report that you read recently. Was the level about right for your needs? If not, how did it make you feel?
- In hindsight, have your past reports ever been pitched at the wrong level? What feedback did you receive?

1.5 Q4: *How much* do my readers want?

Delivering a one-page memo to a reader who was expecting a ten-page report is an embarrassing misunderstanding on your part. So is the reverse.

I was training a group of consultants who had to write reports for a government department. One of their very new staff members (who was present at the training) used to work for that department; they'd hired her away from it. The senior staff were complaining about how long and involved the reports for that department were. They complained how much time they took to prepare and how much this was costing them in billable hours.

The new staff member piped up and said, 'You know, those reports used to come to me. I never used to read them. They were too long.'

Know how much is expected of you. Not only will you be meeting the needs of your readers, you may also save yourself a great deal of time, effort and money.

Discussion

1. How well informed are you about how much your readers want you to write?
2. Is it possible that, in the past, you may have written too much or too little?

1.6 How do I find all these answers?

Okay, so let's review briefly. Before you start to write a report (or *any* document really), at a minimum you need to know three things:

1. *Who* will read my report?
2. *Why* do my readers want my report?
3. *What* will my readers understand?
4. *How detailed* do my readers need it be?

We've seen that without researching good answers to these questions, it's unlikely that we'll write a report that will be well received. How, though, do we *get* these answers?

Here's the trick: *ask people what they want.*

If you ask someone what they need to make *their* job easier, most people will be happy to tell you. Self-interest is a very powerful way of motivating people.

Here's how it might go:

You:	Do you have a moment to discuss the environment report?
Colleague:	Sure.
You:	I've been asked to include a chapter on the levels and probable causes of pollution in the lake. I know that you'll be receiving a copy of the report, so I just wanted to find out what you need me to cover.
Colleague:	Look, I'll be happy as long as you're sure to cover three things. First, …
You:	Got it. Thanks. One last thing: how technical should the language be?
Colleague:	Keep it fairly simple. I've got to discuss this with the CEO, and he's not technical.
You:	How about I write the environmental-management chapter in plain English and confine the technical details to an appendix at the back?
Colleague:	Good idea.

A conversation like this is good for everyone:

- *Your colleague* is more likely to get a report that meets his or her needs.
- *You* end up better informed about what your colleague needs and are thus more confident about writing the report (less stress!). You also end up being praised for writing a good report.
- *Your wider readership* is more likely to be well informed about the topic.

Often, much of the effort that goes into a good report takes place before you start to write.

Discussion

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1. Is it realistic in your organisation to think that you can get access to all the people that you need to talk to?
2. How else can we find out what our readers need from us?

1.7 How do I keep track of what everyone wants?

To continue with the earlier example, let's say that you approach a variety of your readers in this way and discuss their needs with them. You may discover that they all have different needs. To satisfy all of these needs in your report will require you to plan carefully.

For example, you may discover that you're writing for four distinct groups of readers and they each want three topics covered in the report — that's a dozen topics to remember. What's more, each group may want a different level of technical detail and a different length.

That's a lot to keep track of. It can be helpful to create a who-needs-what table.[1] This displays the various readers (across the top) and their needs (in the leftmost column). For example:

Table 1.1: A who-needs-what table shows reader groups and their separate needs.

	Environ. scientists	Local residents	Finance managers	Town planners
Background information (Location, history etc., two pages)	✓	✓	✓	✓
Detailed chemistry of the lake (pH, concentrations etc.)	✓			
Capital expenditure, labour costs etc. (detailed accounting)			✓	
Simple explanation of the chemistry and costs (plain English, one page)		✓		
Drainage plans (Where will we need to dig?)		✓		✓
Conclusions and recommendations	✓	✓	✓	✓

There are many advantages to such a table:

- The more you learn about the needs of your readers, the more detail you can record.
  - If you discover a new set of readers, you can add a new column.
  - As readers tell you of their needs, you can add new rows.
- Without such a table, this information has to be remembered or kept in a less organised form. This could lead to you forgetting key issues.
- Each of the needs identified in the leftmost column can become a heading in your report.

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1 Another name for this is a needs-analysis table.

Discussion

Gathering the information for a who-needs-what table may take a lot of time before you begin writing. Would your time be better spent by just 'diving in' and starting to write with less preparation?

1.8 Headings are a writer's best friend

How do you give each of your readers what they demand without boring the other readers with large tracts of information in which they have little (or no) interest?

A reasonable strategy is to write a separate section (or chapter) aimed at each group. For example, write a chemistry section to keep the environmental scientists happy, a costing section for the managers and accountants, and a drainage section for the town planners.

Write each of these specialised sections using the appropriate language for that group.

In other words, *it's perfectly fine to use science jargon in a section aimed at scientists, but you shouldn't use it elsewhere in your report.* Similarly, only use town-planning jargon in the section aimed at town planners.

What about the needs of readers from a non-technical background? Which sections are written for them?

The answer is *everything else.* Most of your readers will (you hope) read all of the non-specialist sections of your report. These sections should thus be written in a jargon-free style that *all* your readers will understand. In a typical report, this will include the following sections:

- the executive summary;
- the background (or introduction);
- the conclusions; and
- the recommendations.

Discussion

1. Do your existing reports have separate sections (or chapters) for each group of readers?
2. The executive summary, the background, the conclusions and the recommendations will probably be read by all your readers. What other sections may appeal to all readers?

1.9 What if their needs conflict?

There's an old piece of wisdom that say that when you buy a product or service it can be good, it can be fast, and it can be cheap. You can have any two. (If it's good and fast, it won't be cheap etc.)

This is a simple yet insightful observation. It reminds us that some of our readers' needs may conflict with each other. For example, Carol may need the report by the end of the month. Bob may need it to contain details that won't be available until a week later.

What do you do if your discussions with the various parties reveal conflicting needs?

A reasonable strategy is as follows:

- Gently remind each of the parties that the report is also for parties other than themselves. Tell them that you're required to satisfy the needs of many different masters at once. Some colleagues will feel sympathy for your plight and may be willing to relax their requirements a little when they realise that they aren't the only person involved.
- If this doesn't work, ask the conflicting individuals to work with each other to come up with a mutually agreeable compromise.
- If that doesn't work, then (and *only* then) go to someone higher in the organisation and ask them to rule on what needs your report will and won't be able to meet. Try not to overuse this technique, though, as it can lead to resentment.

Discussion

1. What types of needs can sometimes be in conflict?
2. How else might you deal with your readers' conflicting requirements?

1.10 Report or proposal: Am I informing or persuading?

It's my experience that there are only three reasons to write anything:

1. You're writing to *inform*.
2. You're writing to *persuade*.
3. You're writing to *entertain*.

If we ignore number three as being unlikely in business writing (at least deliberately), we end up writing either to inform or to persuade. This is the essential difference between a report and a proposal.

- Reports are written with the primary goal of objectively *informing* the readers about the subject. They are an act of service in which the writer tries to satisfy the needs of the readers.
- Proposals, on the other hand, are written with the primary goal of *persuading* your readers to do something (or believe something). They are written to further the self-interest of the writer.

Put another way, the primary beneficiary of a report is the reader. The primary beneficiary of a proposal is the writer. It is essential that you understand which type of document you intend to write before you begin.

Discussion

1. Does this distinction between reports and proposals seem reasonable?
2. A document can be both informative and persuasive. Do you need to have one of these as your primary goal when you start to write?

1.11 What about objectives?

It's worth mentioning that many sources of advice on report writing talk about setting *objectives* for your report. In this chapter, I've suggested that you concentrate on identifying *readers' needs* instead.

Setting objectives can cause you to think in terms of what *you* need from the report. (*My* objectives are …). Whereas, concentrating on your readers' needs helps you to focus on what *they* need. It's a subtle but important difference.

1.12 Checklist: getting started

Here is a checklist of steps to follow when you're first planning a new report:

Step	Done?
1. Identify the individuals or groups who will read your report	❑
2. For each of them, identify what they need from your report.	❑
3. For each of them, identify a suitable level of technical detail.	❑
4. For each of them, identify how much they want from you.	❑
5. Identify if any of these needs are unachievable or are in conflict. If so, seek agreement on a more achievable set of needs.	❑
6. Congratulate yourself! You now have a clear idea of who your report is for, what each person or group wants, what level they'll understand and how much they need. This is a great start to any report.	❑

Exercises

Consider a report that you have to write soon. If one doesn't come to mind, think of a topic that you'd *like* to write a report on. Now complete these exercises:

1. Who will read this report? List your readers by name if you know them. If not, just indicate their professions; for example: *accounting, human resources, science, management* or *general public.*
2. For each of the people (or professions) that you've identified above, list what you think that person (or group) needs from your report. (In practice, of course, you wouldn't *guess* these needs; you'd try to talk with the people concerned.)

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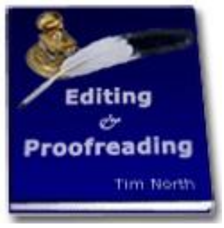

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