Capacitarte

Material Imprimible

Redacción de correos electrónicos, informes y propuestas comerciales

Módulo 3

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Business reports

They examine a situation and most of them make recommendations to the person or group that requested the report. They contain information, research and evident to aid decision-makers in arriving at a decision or understanding a situation.

Categories of business reports

Reports can be categorised as informational or analytical depending on their function. Information reports include the information collected by the author of the report but they do not contain analysis of that information or recommendations, such as a trip report.

Analytical reports include data and conclusions. If requested, they also include recommendations, such as a feasibility report.

Document of transmittal

It introduces a formal report and it addresses the report to the person who commissioned it. It should indicate:

- Who the report was written for
- The name of the report
- The purpose of the report

If the report was commissioned by an external firm, a letter of transmittal should be prepared whereas if the report is for internal use, a memorandum of transmittal is appropriate.

Letter of transmittal

The letter of transmittal should start with the writer's name, position, organisation name and address. After a blank line comes the date. Another blank line should be left before writing the requester's name, position, organisation name and address.

The words "Enclosure" or "Enc." go after the signature to indicate that a report is enclosed.

Dates

The day can go before or after the month. For example:

2nd July = July 2nd

If the day is placed between the month and the year, a comma should be added before the year. For example:

July 2nd, 2020

When the day is placed before the month, the comma before the year is usually omitted, especially in British English.

In American English the day is usually represented by a cardinal number while in British English cardinal numbers are often used.

Memorandum of transmittal

The information contained in a memorandum of transmittal is the same as the information in a letter of transmittal. What changes is the beginning, where the following information should be displayed

To + Addressee's full name

From + Author's full name

Subject + Memorandum of Transmittal for + Name of the report

Structure of an analytical report

The main sections are called: front matter, body and back matter.

The names of the main sections as well as the documents contained in each section may vary depending on the author and organisation.

Front matter

The usual documents contained in the front matter are title page, table of contents, list of tables and figures and executive summary.

Title page

Some organisations include a cover page and a title page. The cover page usually shows the name of the report and an image and/or the logo of the organization the report was commissioned to.

The title page usually includes:

- The title of the report

- The name, title and organization of the person who requested the report
- The names, title and organization of the writer
- Date of submission of the report

The title page should not include a page number.

Table of contents

It is a list of the sections and subsections of a report and their corresponding page number. It helps reader locate information quickly.

The page number of the front matter documents should be in Roman numbers, but the other pages should be in Arabic numbers. Headings, sub-heading and minor subheadings must be numbered and labelled. Main headings must be left-aligned and subheadings should be indented to the right. A dotted line must link headings to their corresponding page number.

List of tables and figures

According to most writers, if a report has more than five tables or figures, a list should be made.

Most authors differentiate tables (graphs made up of columns and rows) from figures (illustrations, graphs, photographs, etc.). If a report includes tables and figures, a list of tables should be followed by a list of figures, with each list on a separate sheet of paper and both with the same format.

Tables and figures should be numbered and labelled and they should be in the order in which they appear in the report.

In addition, the name and number of each table and figure should also be in the body. The source of information should also be provided in the text if the table or figure was not prepared by the writer.

Executive summary

It is an overview of the report written for busy people who may not have time to read the whole report and are interested in knowing its main points. It is usually two-page long maximum and it is written last.

It should include:

- The purpose of the report

- The scope of the report

- The methodology followed by the writer

- The most important findings, conclusions and recommendations

Abstracts and executive summaries

Both of them are brief and cover the main points of the report.

Abstracts are used principally when writing research papers and technical reports whereas executive summaries are used in business.

An abstract is written to help a reader decide whether reading the whole report is worth it or not while an executive summary is a synopsis of a report written for busy executives and managers.

The body

It offers a detailed description of the work performed by the writer, how that work was done, what was discover and the conclusions and recommendations put forward.

The usual sections are introduction, findings, conclusions and recommendations.

Introduction

It introduces the topic of the report and it informs readers what the report will cover. It typically includes the following points:

- Topic of the report

- Purpose of the report

- Background information

- Scope

- Methodology

- Constraints or limitations

- Forecast of the structure of the report

Methodology

It should provide information regarding the methods used to do research. The purpose of including this information is to persuade reader that the data is accurate, valid and reliable.

This section of the report should offer the following information:

- When the data used in the report was gathered
- How the data was gathered (e.g., observation, quizzes, questionnaires, etc.)
- Who the data was gathered from (e.g., a sample, everyone involved, etc.)
- How many people were involved

Findings

This section explains what the writer has discovered and how. It should offer enough information, evidence and analysis to support conclusions.

According to some writers, this section should be around 60% of the total word count.

Some authors prefer to place what they have discovered first under the heading "Findings". Then they analyse the information under another heading which may be called "Discussion" or "Analysis". However, other authors prefer to present and analyse the information at the same time under a heading like "Findings" or "Discussion". That way of organising findings depends on you or the organisation you work for.

Conclusions

They are deductions or inferences based on findings. They have a direct relation to the purpose of the report and should offer an interpretation of the findings. They should be limited to the data presented.

In relation to their organisation, number and list conclusions. Place the most important ones first.

This section represents approximately 5% to 10% of the total word count.

The following verbs collocate or go with the word "conclusion":

- "Draw", "reach", "arrive at" and "come to". These verbs are usually preceded by the personal pronoun "we".
- "Point to", "lead to". These verbs are usually preceded by the word "findings".

Recommendations

They are action-oriented suggestions to handle a situation or solve a problem.

They should be written separately and they should be numbered. A parallel form should be used when writing them. It is preferable to start each recommendation with an action verb. The main recommendations should come first. Avoid the use of conditional sentences and words like "maybe" or "perhaps". If requested, an explanation of how each recommendation can be implemented should be provided.

In reference to the difference between conclusions and recommendations, conclusions are about a present or past situations whereas recommendations are changes suggested for the future.

Useful vocabulary

- In view of, e.g., "In view of the salespeople's lack of product knowledge, we recommend that the following steps be taken to familiarise them with the products the company sells".

- Due to, e.g., "Due to the considerable number of customers' complaints, I put forward the following recommendations".
- Support, e.g., "The findings and conclusions in this report support the following recommendations".

Grammar

The verb "recommend" can be followed by one of these patterns:

- A noun/noun phrase, e.g., "We recommend flexitime".
- A gerund, e.g., "We recommend implementing flexitime".
- A that-clause (subject + infinitive verb), e.g., "We recommend that ABC implement flexitime". / "We recommend that ABC should implement flexitime". (British English)

The object pronoun + infinitive verb patter cannot follow the verb "recommend". Therefore, it would be incorrect to say "We recommend you to implement flexitime".

Ways of presenting recommendations

There are different ways of presenting recommendations, but, irrespective of the chosen way, it is important to follow a grammatical parallelism. If a gerund is used for the first recommendation, the rest of them should start with a gerund. For example:

We recommend:

- Implementing flexitime
- Reducing working hours
- Offering selected employees the possibility of working from home.

The same rule applies if an infinitive verb starts the list of recommendations.

Recommendations:

- Implement flexitime
- Reduce working hours
- Offer selected employees the possibility of working from home.

SMART

The SMART acronym can be used to write recommendations to ensure that they are effective.

S stands for "specific". Recommendations must be well defined and unambiguous.

M stands for "measurable". The criteria to be used in order to measure progress toward the accomplishment of a certain objective must be clearly indicated.

A stands for "attainable" and it means that the recommendation must be doable.

R stands for "relevant" and it implies that there must be a real benefit connected to each recommendation.

T stands for "time bound". Recommendations should set realistic deadlines or timeframes.

Back matter

The documents included in the back matter supplement the body. Some of the typical documents are glossary, appendices and list of references.

Glossary

It is a list of the technical terms written in the report as well as their corresponding meanings. They must be in alphabetical order. This document is prepared only if readers are not familiar with certain words.

List of references

If data produced by someone other than the author of the report is mentioned in the report, a list of references should be provided.

The most common referencing styles are the ones dictated by the Modern Language Association (MLA) and the American Psychological Association(APA). The MLA documenting style is used for arts and humanities while the APA one is used for business documents, education, psychology and sciences.

Appendices

An appendix is a document that improves readers' understanding of the report and provides additional details. Examples of appendices are graphs, questionnaires, texts, photographs, etc.

The singular form is "appendix" and the plural form is "appendices".

Appendices should be given a letter and a title name and they should be in the order in which they appear in the text.

The writing process

This process includes three stages: preparation, writing and revision.

Preparation

The preparation process entails all the activities performed before actually writing the report.

Suggested steps:

- Define the problem or issue to be investigated.
- Write down a statement of purpose.
- Know the prescribed structure for the report.
- Know the audience, their expectations, possible reaction, what they know about the topic and what they need to know about it and what sources they trust.
- Prepare a work schedule considering resources, budget, expenses, number of participants and deadline.
- Divide the work clearly if there are many contributors and inform them of the deadlines.
- Make a list of potential topics and headlines.
- Divide the work into manageable parts.
- Plan your research strategy including sources and methods of collecting data.
- Collect the information and review the material gathered to see what material fits the purpose of the report.

- Go back to the possible headings and check what data may go under those headings.
- Organise the information according to an indirect or direct approach or organisational pattern.

Direct approach

This approach is chosen when the audience will be receptive and support conclusions. In this case, conclusions go first, then recommendations and findings go last in the body.

Indirect approach

This approach is followed when the audience needs to be informed of when the audience is likely to be sceptical or hostile. Findings are placed first, followed by conclusions and recommendations in the body of the report.

Writing

The audience and the purpose of the report should be in the writer's mind at all times.

Important considerations:

- Avoid contractions, abbreviations, phrasal verbs, idiomatic expressions, colloquial and informal words and slang.
- Write out numbers that start a sentences and spell out cardinal numbers from one to nine and ordinal numbers from first to ninth.

- Structure paragraphs along a topic sentence that describes the most important idea of that paragraph. Include transitions within and between paragraphs.

In relation to the use of the passive voice, although reports used to be filled with sentences in the passive voice, the trend is lo limit it to situations when you don't know who or what the doer is, when that information is irrelevant or to make a statement sound less hostile or accusatory.

In relation to verb tenses, the following guidelines should be considered:

- For the purpose of the report, past simple or present simple. For example:
  - "In this report, we concentrated on the importance of reading at an early age".
  - "This report analyses the reasons for the rise of autocratic regimes".
- For introductions, present perfect to mention actions that happened at an unstated time or actions that started in the past and continue until now. For example:
  - "Many studies have focused on the results of automation".
- If a specific time is mentioned, simple past should be used. For example:
  - "A study conducted in 2020 concentrated on the results of automation".
- For the methodlgy section, simple past. For example:
  - "Fifty employees were interviewed".

- For findings, past tenses to indicate what was discovered or done. For example:
  - "The procedures were not followed consistently between 2010 and 2012".
- For findings that are still true, present tenses:
  - "Grisham proved that the treatment is effective".
- For findings that are general truths, simple present:
  - "Genetic information is encoded in our DNA".
- For the discussion of the findings, a combination of past and present tenses is possible:
  - "60% of the adults showed high levels of anxiety and stress symptoms, which increases the chances of developing cardiovascular diseases".
- For visual aids, present simple:
  - "The table shows…"
  - "The graph compares…"
- For conclusions, simple present to talk about general truths:
  - "Sedentary lifestyles increase all causes of mortality".
- For conclusions about specific past situations, simple past:
  - "Overlapping of tasks was the cause of the incident".

Revision stage

- Ensure the report is complete.
- Evaluate its contents and verify the report achieves its purpose. Ensure each section achieves its purpose.
- Make sure the information flows logically and smoothly. If it does not, check if transitions are missing.

- Ensure the report forms a meaningful whole.
- Assess if the report is accurate and concise.
- Revise headings and subheadings.

Headings and subheadings

- Use self-explanatory headings instead of vague ones.
- Don't include the article "the" at the beginning of a heading unless you are referring to a thing of a kind.
- Keep at least two lines of body text with a heading. If that is not possible, start a new page.
- Ensure that the hierarchy of headings and subheadings is clear.
- Use a parallel form for headings and subheadings.
- The first letter of the heading should be in capital letters but the other words should be in small case, unless they are proper nouns.

Revision

Check if the report is free from spelling, punctuation and grammar mistakes as well as errors in layout. If possible, ask someone else to be in charge of the revision stage.