

## Report Writing Skills Training Course

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# 1 - Introduction

Writing is a form of communication. Good writing is effective because it achieves its objective and accomplishes what was intended. Writing is a skill; it can be learnt, and like most skills it is not inborn, but is learnt and perfected through practice. Confidence is the main necessity, and having the courage to try. No amount of reading can substitute for practice.

The key to effective business writing is a systematic approach which aims to be clear and simple. While there are many different formats for business writing - reports, letters, memos, etc. - they all need a common approach and should all use the steps outlined below.

## 1. Identify the Objective

As you plan and prepare to write, your first question must be: what am I trying to achieve? This may be

- To Describe
- To Explain
- To Recommend
- To Persuade
- To Apologise
- To Complain
- etc.

Which information you include in a document and how you arrange it is dictated largely by your intention in writing it. The best way to focus your efforts is to write down your objective. The act of writing it down transforms the way you approach the whole writing process.

A clear decision on objective is vital, for it governs all subsequent actions. And this brings us to the next main question: whom is the document for?



## 2. Consider Your Readers

It is easy for a writer to assume that the readers have exactly the same interests and needs as the writer; but this is rarely true. Most of your readers will want to use the information to meet needs different from yours.

It is often helpful to sit and consider what your reader will do after reading your document: file it, dump it, write a cheque, re-use the information, apologise, etc. Many documents fail because the writer has not thought enough or clearly about his/her aim. Many writers are content with vague ideas about the use of the document.

Who are Your Readers?

- Are they all alike or a mixed group?
- What do they already know about the topic?
- What do they need to know?
- What are their attitudes to the subject, to the writer and to the writer's objectives?



### 3 Plan your Writing

The purpose of a plan is to lay out the basic structure of your writing and help prevent dead ends, mental blockages and unconnected flows of ideas. You should develop your own method of planning but the end result will be a series of headings with subheadings as necessary. This indicates the structure of what you will write and the sequence in which you will cover the various points. Lists, trees and mind maps are the most commonly used planning tools.

#### 1 Write a Synopsis

You are not unusual if you find it hard to impose order and exact expression on your ideas, most of us do. If you have the time and the opportunity, it is useful to expand your plan into a form comprehensible to others. This synopsis can then be discussed with colleagues and friends (if they will listen); their ideas and advice can be very useful.

It is not an admission of weakness to ask for help in planning and preparing the presentation of material to other people. Someone else will see implications in what we write other than those that stuck in our minds. Points that seemed implicit from our standpoint are often not at all obvious when viewed from someone else's frame of reference.

The act of writing a synopsis also helps us to identify flaws for ourselves. It will often cause us to realise that there are gaps in what we planned or that the sequence of points needs to be changed.

#### 2. Write a Draft

Now, and only now, the time has come to start drafting the text. Notice that already you are two-thirds of the way through the work; writing is now a straight forward matter, since the most important decisions about content and order have already been taken.

The value of the synopsis will now become clear. For most of us, uncertainty about what words to use stems mainly from uncertainty about what we want to say.



Aim to get the most rapid possible flow of ideas on to the paper at the first pass. Don't stop to analyse the quality of your writing. First, get down a flow of words.

Remember that there is a further revision to come. Leave blanks, with brief notes, for points you want to look up later. This prevents your flow of thoughts from being diverted.

### **3 Leave it!**

Try to leave the draft for some time. Then, when you look at it again, you will have forgotten the precise line of thought that was in your mind when you wrote it and what you meant to say.

It may also be helpful to get someone else to read the draft.

### **4 Revise and Edit**

Revising, like other writing tasks, is best done in stages. First read through the draft without stopping. This enables you to see the overall flow. Mark areas that need revision, as well as spelling errors, poor sentences and facts that need to be checked.

The fundamental principles are that the text should be clear and intelligible to the person reading it. To achieve this, your writing should be simple and to the point. Avoid unnecessary wordiness, pompous phrasing and keep your focus on what you are trying to say.



## 4 - Report Writing

A "Report" may be defined as a document in which a given problem is examined for the purpose of conveying information, reporting findings, putting forward ideas and, sometimes, making recommendations.

Report writing is a specialised form of written communication. Many of the rules which must be observed when writing a Report are, therefore, equally applicable to written communications in general. The three cardinal rules of Report Writing - as indeed of all functional writing - are ***Accuracy, Brevity and Clarity***.

They are not easily mastered. "Hard writing makes easy reading". A report writer must constantly strive to make his reader's task as easy as the subject matter permits.

### The Four-Stage Method

The method recommended has four stages:

- Stage I: Preparation**
- Stage II: Arrangement**
- Stage III: Writing**
- Stage IV: Revision**

### Stage 1: Preparation

#### 1. Your Purpose

- (a) Find out exactly what you have been asked to do. In other words: try to get concise terms of reference.
- (b) Establish clearly in your mind the subject, scope and purpose of your Report. The purpose will generally be a combination of some or all of the following:
  - (i) To give information, either detailed or general;
  - (ii) To report findings;
  - (iii) To put forward ideas;
  - (iv) To recommend a course of action.



## 2. Your Reader

Ask yourself:

- (a) What do my readers want to know?
- (b) What do they know already?
- (c) How can I graft new knowledge on to their existing knowledge?
- (d) What kind of terminology will they understand?
- (e) How will they use my Report?

Remember that you have to meet the needs of specific readers. Is their outlook executive, administrative, technical or practical?

## 3. Your Material

- (a) Collect facts and ideas about your subject by experiment, observation, reading and conversation. This may be a bigger job than the actual writing of the Report.
- (b) Check your facts for accuracy.

### **Jot Down All Your Facts and Ideas.**

Record them in note form. Any order may be followed at this stage, as circumstances dictate. If any main divisions of your subject are obvious, however, you can allot a separate page or index card to each of them. For instance, an industrial subject may divide itself naturally into the technical, financial, labour and administrative aspects.

## Stage II: Arrangement

Observance of the following ten points will help you to construct a concise, logical and well arranged report.

1. **Write down your purpose in one simple sentence.** This will test your understanding of your task and deter you from including unnecessary points. Then choose a title that makes your purpose plain.
2. **Consider your collected facts and ideas.** Reject any which on second thoughts are neither helpful nor necessary to your purpose. Add notes of any others which now appear essential or desirable.



3. **Review any main divisions critically, and revise them if necessary.** If you could not make groupings earlier, consider now what the main divisions should be. Choose a section heading for each main division. Write each heading on a separate sheet of paper or index card, and list your selected items (in the briefest possible note form) under the appropriate headings.
4. **Decide the order in which you will present the main divisions.** They will form sections of your Report. Number your section headings so that they can be easily referred to in any discussion of your report.
5. **Within each division, arrange your material in an order which your reader will easily follow.** Lead him or her step by step from the known to the unknown. If there are few items in any one group, you can number them on your existing sheet or card. If there are many items under any one heading, you may prefer to re-write them, in your chosen order, on a fresh sheet or card. Careful preparation of this kind is the only way to clarify a complex subject. Your objective throughout should be to sort your selected material into a few simply-arranged groups. You may sometimes have to resist the temptation to write at length about a few simple findings just because it took you a long time to collect the facts on which those findings are based.
6. **Make sure your conclusions or recommendations square with your facts.** Decide whether to group them in a section of their own which will form a natural Conclusion to your Report, or distribute them among the sections to which they belong. You may even use both methods, stating your conclusions and recommendations section by section, and re-stating them with cumulative force in your Conclusion.
7. **Review your title and section headings critically.** They should identify, and not merely describe, the subject matter under them. Thus "Replacement of Overhead Conveyor System" is better than 'Problems of Material Handling'. Brevity is desirable, but three or four precise, informative words are better than two vague ambiguous ones.
8. **Consider what use you can make of illustrations to supplement or replace words.** A good diagram is often worth more than a page of writing.



**9. Consider the advisability of using footnotes.** If used with discretion they may help the unimpeded flow of narrative or argument.

They may be used:

- (a) to give sources of quotations or references mentioned in the text:
- (b) to indicate authorities or sources of additional information:
- (c) to explain pages in the text which may be clear to some readers but not to others.

Footnotes should be as brief as possible. They should appear on the same page as the text to which they refer. If they are used only in isolated instances, an asterisk\* may be appropriate. Otherwise footnotes should be numbered consecutively, beginning on each page with 1.

**10. Consider whether you can lift any factual details out of the main divisions and place them in appendices.** Appendices perform functions similar to those of footnotes by removing distracting details and thus enabling the reader to follow the main line of thought without interruption. You may of course have to summarise the relegated details in the report itself.

## Stage III: Writing

### 1. Style

Decide what the tone of your text should be. A lucid, business tone and balanced exposition is usually desired in business, scientific and technical Reports. A challenging or controversial approach may, however, occasionally be justified.

### 2. Arrangement

Consider whether you can help your reader by numbering or lettering paragraphs or items within the sections. Any numbering or lettering scheme must be maintained consistently and must be set out on the page so that it is clearly subordinate to the section numbering. This workbook exemplifies one useful system: Roman numerals are used for section headings, and Arabic numbers and italic letters with the section.



Another system, frequently employed in Government Reports, is to number all paragraphs consecutively, from Preface or Introductions right through to the final Summary. This numbering of paragraphs is independent of any division of the Report into numbered or lettered Sections, Chapters or Parts. It has the merit, especially in a very long Report, that cross references from any part of the Report to any other can be given with ease and accuracy by merely quoting the numbers of the appropriate paragraphs. This obviates references to chapters, sections or pages.

### 3. Illustrations

Think of your illustrations as you write, so that reading matter and visual items may be closely linked. Every illustration should be referred to at least once in the text and should be accompanied by an identifying caption or title. If you have more than two or three illustrations, it may be advisable to number them for reference.

Illustrations may either:

- (a) Have general significance for one or more sections of a Report and receive several textual references; or
- (b) Illustrate a single point and be referred to in only one small portion of the text.

Illustrations of type (a) can conveniently precede the first textual reference; type (b) should be placed as close as possible to the single reference - clarity is best served if this type of illustration immediately follows its reference.

### 4. The Introduction

Your Report will need an Introduction - which may be written last of all. The introduction is the place for a broad, general view of your material. Avoid details which belong properly to the main sections or appendices.

In your Introduction

- (a) State the name and appointment of the recipient. If the Report is to go to several people append a Distribution List sub-divided, if necessary, into two parts: *For Action* and *For Information*;
- (b) Date your Report;
- (c) Use classifications, such as 'Secret', 'Confidential' and 'Private' only where they genuinely apply;



- (d) Define your subject and indicate broadly its extent, composition and significance;
- (e) State your purpose and terms of reference, and indicate how far you have been able to carry them out (Your report may have limitations for which you are not responsible);
- (f) Provide background information (such as the sequence of past events leading to a present problem) which your reader will need, and which s/he may not know or clearly remember;
- (g) State fully - or summarise - your results, conclusions or recommendations;
- (h) Announce the arrangement of your main sections;
- (i) Define technical terms and words that you intend to use in a special sense.

Make a definite break - marked normally by your first section heading - between your Introduction and your first main section. Decide whether to include your Introduction in your section numbering. If the introduction is numbered '1' the first main section must be '2'.

Make your Introduction as interesting as you can, for instance by singling out points of immediate practical or financial significance, but beware of sensationalism or distortion of fact.

## 5. The Main Sections and Appendices

Concentrate on writing one of your Sections or Appendices at a time. You may need to do some or all of the following in each section:

- (a) State facts obtained and indicate source;
- (b) Analyse these facts;
- (c) State the conclusions or recommendations based on them;
- (d) Describe the procedure followed in your investigation or experiments.
- (e) Refer to, or summarise matter fully presented in an Appendix.

Once you have overcome the first inertia, forge ahead from point to point in the sequence you planned when arranging your material. What you are producing is a draft, subject to revision. It is more important to achieve a flowing style than to worry at this stage about niceties of grammar, or even the exact observance of the advice on this page.



## 6. The Conclusion

- (a) Summarise the discussion in the main sections;
- (b) Summarise findings and inferences;
- (c) Make recommendations based on your findings and inferences;
- (d) State clearly what action should be taken as a result of your recommendations and by whom;
- (e) Emphasise finally the significance of your subject matter;
- (f) Refer briefly to any wider considerations, outside your terms of reference, on which your Report may have a bearing.

**Conclusion and Introduction are closely interdependent.** If you merely summarise your conclusions and recommendations in your Introduction you will still need to give them in full in your Conclusion. If you give them in full in your Introduction, you may decide not to repeat them in your Conclusion. The Conclusion should have a section heading of its own, to mark it off clearly from the last main section.

You may decide to make a radical change in the Introduction - Main Sections - Conclusion sequence by placing the Conclusion immediately after the Introduction, or even by combining the Introduction and Conclusion. The main sections will then become in effect, though not in name, appendices. This re-arrangement is often suitable when you have to cater for two classes of readers: the general reader who wants to reach your conclusions and recommendations quickly without studying your facts and reasoning, and the specialist who wishes to examine your subject matter in full detail.

## 7. List of References

If your Report contains numerous references to other publications it may be useful to compile a separate bibliographical Appendix. Each reference should contain full information in the following order: Author(s); Title; Edition; Place of Publication; Publisher; Date of Publication; Number of Pages; Price.

## 8. The Table of Contents

Some people may wish to read your main headings without going right through your Report. You should, therefore, provide them with a Table of Contents.



This customarily precedes the Introduction, but it is equally logical for the Introduction to come first.

The Table of Contents may be compiled as follows:

- (a) Copy the numbered section and sub-section headings
- (b) Indicate the relationship between headings and sub-headings by indentation.
- (c) Add separate lists of tables and illustrations if necessary.
- (d) Leave spaces for page numbers to be filled in by your typist.

## 9. The Synopsis

You may think it helpful, or it may be the practice of your organisation, to present a Synopsis of the whole Report before the Table of Contents and Introduction. Your original single-sentence statement of your purpose may help you to make the synopsis brief and pithy.

## Stage IV: Revision

When you have completed your rough draft, lay it aside for a day or two, if time permits. Then try to criticise it objectively as though it were the work of another author.

1. **Make a cursory examination of your draft as a whole.** Is the design of your Report apparent? Check your system of headings. Are they consistent with your purpose?
2. **Consider the Title, Table of Contents, Introduction and Conclusion in relation to one another.** Have you stated your subject, purpose and plan clearly in the Introduction? Do your headings agree with the Table of Contents and with the plan announced in the Introduction? Have you carried out your plan from start to finish of your Report? Have you placed emphasis on the correct points?



3. **Examine your text in detail.** Weigh every statement critically - especially if you think it is liable to be quoted out of its context. Check grammar, spelling, punctuation and style.
4. **Read the text aloud to yourself, or preferably to somebody else.** Does it read easily and smoothly? Can your listener follow you? Are there any tiresome repetitions? On the other hand, have you omitted any essential points - or failed to mention them early enough to ensure understanding?
5. **Check your illustrations.** Does each convey its message clearly? Have you eliminated unnecessary detail? Have you included everything helpful to your purpose? Is the association between text and illustrations as clear and as close as possible? Have you fully exploited your illustrations as a means of avoiding longwinded explanations in the text? Are the captions precise and informative?
6. **If possible, submit your draft to a person qualified to give constructive criticism.**

**This check-list may help you to correct errors of fact, presentation and style.**

## 1. FACTS

### **Beware of:**

- (a) Mis-statement, exaggeration, misinterpretation or omission of facts.
- (b) Failure to distinguish between fact and opinion.
- (c) Contradictions and inconsistencies.
- (d) Conclusions unwarranted by the evidence.
- (e) Vague descriptions where accurate (or approximate) figures could be used. For example: "This machine is of considerable size" - should be "This lathe occupies 14 x 5 sq. ft., has a 3 ft. dia. swing overgap and 26 ins. dia. swing without gap. Distance between centres is 6 ft."

## 2. PRESENTATION

### **Beware of:**

- (a) Omission of matters important to the chain of thought.
- (b) Inclusion of material in wrong section or paragraph.



- (c) Inconsistency in layout and presentation .
- (d) Failure to open each paragraph with a telling sentence clearly related to the theme of the paragraph.
- (e) Inclusion of irrelevant or tedious details.
- (f) Failure to distinguish between new knowledge and what is already well known.

### 3. STYLE

#### **Beware of:**

- (a) Long sentences (more, say, than 18-20 words or two or three typewritten lines), long paragraphs and complicated grammar.
- (b) Lack of clarity - sentences that require re-reading before their meaning can be grasped. For example: "People have got to like the "Pools".
- (c) Successive statements that suggest an unintended (and perhaps ludicrous) relationship. For example: "Mr. Brown was absent. The meeting was a success."
- (d) Omission of such useful relation-words as "however," "moreover," "on the other hand", especially in short sentences.
- (e) Wordiness and padding - failure to come to the point.
- (f) Needless technical language, and sentences overloaded with unfamiliar words.
- (g) Clichés, especially pompous ones. For example: "The numbers have assumed such proportions that...." instead of "The number have grown so much that..."
- (h) Failure to relate all the items in a list to the introductory words. For example:
  - (i) 40 miles per gallon at 30 miles per hour .
  - (ii) 30 miles per gallon at 40 miles per hour
  - (iii) the steering is power-assisted.

