

Written Reports

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WHAT'S COVERED

In this lesson, you will learn about the various types and fundamental components of written reports in professional environments. Specifically, this lesson will cover:

1. What Is a Report?

A **report** is a document designed to record and convey information to the reader. Reports are part of any business or organization; from credit reports to police reports, they serve to document specific information for specific audiences, goals, or functions.

The type of report is often identified by its primary purpose or function, as in an accident report, a laboratory report, a sales report, or even a book report. Reports are often analytical, or involve the rational analysis of information. Sometimes they simply "report the facts" with no analysis at all, but they still need to communicate the information in a clear and concise format.

Other reports summarize past events, present current data, and forecast future trends. While a report may have conclusions, propositions, or even a call to action, the demonstration of the analysis is the primary function.

➔ **EXAMPLE** A sales report is not designed to make an individual sale. It is, however, supposed to report sales to date, and may forecast future sales based on previous trends.



TERM TO KNOW

Report

A document designed to record and convey information to the reader.

2. Informational and Analytical Reports

There are two main categories of reports, regardless of their specific function or type. First, an **informational report** informs or instructs and presents details of events, activities, individuals, or conditions without analysis.

IN CONTEXT

An example of this type of "just the facts" report is a police accident report. The report will note the time, date, place, contributing factors like weather, and identification information for the drivers involved in an automobile accident.

It does not, however, establish fault or include judgmental statements. You should not see "Driver was falling down drunk" in a police accident report. Instead, you would see "Driver failed sobriety tests and breathalyzer test and was transported to the station for a blood sample." The police officer is not a trained medical doctor and is therefore not licensed to make definitive diagnoses, but can collect and present relevant information that may contribute to a diagnosis.

The second type of report is called an **analytical report**. An analytical report presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations.

IN CONTEXT

An example of this report may be a field report by a Center for Disease Control (CDC) physician from the site of an outbreak of the H1N1 virus, noting symptoms, disease progression, steps taken to arrest the spread of the disease, and recommendations on the treatment and quarantine of subjects.

The following table includes common reports that, depending on the audience needs, may be informational or analytical.

Type	Function
Laboratory Report	Communicate the procedures and results of laboratory activities.
Research Report	Study problems scientifically by developing hypotheses, collecting data, analyzing data, and indicating findings or conclusions.
Field Study Report	Describe one-time events, such as trips, conferences, seminars, as well as reports from branch offices and industrial and manufacturing plants.
Progress Report	Monitor and control production, sales, shipping, service, or a related business process.
Technical Report	Communicate process and product from a technical perspective.
Financial Report	Communicate status and trends from a finance perspective.
Case Study	Represent, analyze, and present lessons learned from a specific case or example.
Needs Assessment Report	Assess the need for a service or product.
Comparative Advantage Report	Discuss competing products or services with an analysis of relative advantages and disadvantages.
Feasibility Study	Analyze problems and predict whether current solutions or alternatives will be practical, advisable, or produce the desired outcome(s).
Instruction Manuals	Communicate step-by-step instructions on the use of a product or service.
Compliance Report	Document and indicate the extent to which a product or service is within established compliance parameters or standards.

Cost-Benefit Analysis Report	Communicate costs and benefits of products or services.
Decision Report	Make recommendations to management and suggest tools to solve problems and make decisions.
Benchmark Report	Establish criteria and evaluate alternatives by measuring them against the established benchmark criteria.
Examination Report	Report or record data obtained from an examination of an item or conditions, including accidents and natural disasters.
Physical Description Report	Describe the physical characteristics of a machine, device, or object.
Literature Review	Present summaries of the information available on a given subject.



TERMS TO KNOW

Informational Report

A type of report that informs or instructs and presents details of events, activities, individuals, or conditions without analysis.

Analytical Report

A type of report that presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations.

3. Common Report Components

Reports vary by size, format, and function. You need to be flexible and adjust to the needs of the audience while respecting customs and guidelines.

Reports are typically organized around six key elements:

1. Whom the report is about and/or prepared for
2. What was done, what problems were addressed, and what the results were, including conclusions and/or recommendations
3. Where the subject studied occurred
4. When the subject studied occurred
5. Why the report was written (function), including under what authority, for what reason, or by whose request
6. How the subject operated, functioned, or was used

Pay attention to these essential elements when you consider your stakeholders, or those who have an interest in the report. That may include the person(s) the report is about, whom it is for, and the larger audience of the business, organization or industry.



HINT

Ask yourself who the key decision makers are who will read your report, who the experts or technicians will be, and how executives and workers may interpret your words and images.

While there is no universal format for a report, there is a common order to the information. Each element supports the main purpose or function in its own way, playing an important role in the representation and

transmission of information.

Here is a checklist for ensuring that a report fulfills its goals:

- Report considers the audience's needs.
- Format follows the function of the report.
- Format reflects institutional norms and expectations.
- Information is accurate, complete, and documented.
- Information is easy to read.
- Terms are clearly defined.
- Figures, tables, and art support the written content.
- Figures, tables, and art are clear and correctly labeled.
- Figures, tables, and art are easily understood without text support.
- Words are easy to read (font, arrangement, organization).
- Results are clear and concise.
- Recommendations are reasonable and well-supported.
- Report represents your best effort.
- Report speaks for itself without your clarification or explanation.



SUMMARY

In this lesson, you learned that a **report** is a document whose purpose is to record and convey information. **Informational and analytical reports** are the two main categories of reports. Informational reports present facts without analysis, while analytical reports provide information and interpret the meaning of that information in some way. Finally, you learned that there is not one single way to write a report. However, there are **common report components**, including topic, audience, time, place, purpose, history, and conclusions.

Best of luck in your learning!

Source: This tutorial has been adapted from "Business Communication for Success" Version 1.0 by Scott McLean. Copyright 2010. ISBN 978-1-4533-2742-5 (Licensee Product: Workplace Communication), reprinted with permission from FlatWorld.



TERMS TO KNOW

Analytical Report

A type of report that presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations.

Informational Report

A type of report that informs or instructs and presents details of events, activities, individuals, or conditions without analysis.

Report

A document designed to record and convey information to the reader.