WRITING BUSINESS REPORTS

Writing Reports - Template Structure

Typical structure template for writing a report:

- Title, author, date.
- Contents.
- Introduction and Terms of Reference (or aims/scope for report).
- Executive Summary (1-2 pages maximum) containing main points of **evidence**, **recommendations** and **outcomes**.
- **Background**/history/**situation**.
- **Implications**/**issues**/**opportunities**/**threats**, with **source-referenced** facts and figures **evidence**.
- **Solution**/action/decision **options** with implications/**effects**/results, including **financials** and parameters **inputs and outputs**.
- **Recommendations and actions** with **input and outcomes values and costs**, and if necessary **return on investment**.
- Appendices.
- Optional Bibliography and Acknowledgements.

Map out your structure before you begin researching and writing your report.

Ensure the purpose, aims and scope of the report are clearly explained in your terms of reference.

The executive summary should be very concise, summarising the main recommendations and findings. Provide interpretation of situations and options. Show the important hard facts and figures. Your recommendations should include implications, with values and costs where applicable. Unless yours is a highly complex study, limit the executive summary to less than two sides of standard business paper.

The body of the report should be divided into logical sections. The content must be very concise. Use hard facts and figures, evidence and justification. Use efficient language - big reports with too many words are not impressive. The best reports are simple and quick to read because the writer has properly interpreted the data and developed viable recommendations.

Do not cram lots of detail, diagrams, figures, evidence, references etc., into the main body of the report. Index and attach these references as appendices at the end of the report.

Where you state figures or evidence you must always identify the source.

Show figures in columns. Try to support important figures with a graph.

If it's appropriate to acknowledge contributors then do so in the introduction or a separate section at the end.

Writing Reports When You're Not Sure What's Required

If ever you are confronted with the task of writing a report and you are unsure of how to go about it, here are some tips.

It's common to be asked to write reports in business and organisations, for all kinds of reasons. Sometimes reports are required for good reasons - sometimes they are simply a waste of time. Sometimes reports are requested with clear terms of reference and criteria, but mostly they are not. It's common for reports to be requested with only a vague idea given as to what is actually needed - commonly there is no written 'brief' or specification.

The writer then spends days agonizing over what the report should include and look like, how long it should be, whether to include recommendations, whether to attach detailed information, etc. All this confusion is unnecessary and can be avoided by asking some simple questions.

Many people new to report-writing think that it's not the done thing to ask what the report should look like, often for fear of appearing unsure or incapable. But the fact is that before writing reports or business plans of any sort the writer **should always** first seek clarification of exactly what's required.

Don't assume that the request is reasonable and properly thought-through - in many cases it will not be. If the request for a written report is not perfectly clear, **ask for clarification**. Experienced people ask and seek clarification all the time - it's perfectly sensible and logical to do so.

Seeing sample reports from other industries and organisations is not always very helpful. Sample reports from completely different situations can be very misleading, aside from which, good sample reports are actually quite difficult to find anyway because most are subject to commercial or other confidentiality. In any event, there are so many different types of reports and report formats that there's no guarantee that an example from elsewhere would be right for your particular situation.

You are often better simply to follow the guidelines above, and avoid wasting time looking for elusive report examples. Trust your own judgement. Creating a sensible structure and building your own report is generally quicker and better than seeking inspiration elsewhere.

Importantly ask your employer or boss or client (whoever has requested the report) for their ideal format and if appropriate ask for examples of what they consider a suitable format for them. It's perfectly reasonable to seek clarification in this - you are not a mind-reader. There's a whole load of mystique around reports and business plans which is rarely dispelled because folk are afraid to ask - so break the cycle of doubt and assumption - ask.

As already explained, when writing anything - especially reports - the shorter the better is normally the case, especially when the audience is senior and strategic management or directors.

In truth most long reports generally don't get read, and what's worse is that some bosses don't have the sense to help the writers see how they could have submitted something far shorter. So the mystique persists.

Everyone - especially people new to report-writing thinks they should know how to do it, and nobody generally puts their hand up and dares to break the taboo by asking "What exactly do you want this report to look like?" In fact many bosses can't write a decent report themselves, which makes them even less likely to offer to explain what's required.

So, when faced with your next vague request to "Write a report...", cut through the nonsense, as they say, break the taboo, and **ask people what they want**:

Discuss and agree the report specification with the person requesting it - if they aren't sure themselves, then help them to define the criteria by asking helpful questions, such as -

- Is there a written specification or 'terms of reference' for this report?
- Where did the original request for this report come from and what do you think they expect and need?
- Can we find out more about what is expected from this report?
- How many words or pages?
- Who is this report for and what will they use it for?
- What format do you (or they) prefer?
- Would people actually prefer a PowerPoint presentation of the main points instead of a bloody great big report that no-one will bother to read?
- Do you want recommendations and actions in the report? Or just a conclusion?
- Do you want detail referenced and appended or available on request?
- Is this report really truly necessary? - might there be a better quicker more effective way to give the person asking for it what they actually need, whatever that is?

If you don't know what someone wants a report to be like, or what the report is for, then don't let people kid you into thinking that you should be able to guess.

Ask some helpful questions to agree a sensible report format, length, outcomes, etc., and you'll avoid the agonizing guesswork, and save everyone's time.

Finally - when you yourself next have to ask one of your people, or a supplier, or anyone else for that matter, to '"write a report..", think about all of the above carefully and ask yourself the questions that will help you first confirm that a report is actually necessary, and then to define and provide clear and helpful guidelines, or a specification, or 'terms of reference', so that the person having to write the report can fully understand what sort of report is required and why.