

Business Report Writing

Introduction

Written evidence is vital: good written evidence enables people in business to quickly review data that may have taken time to collect and assist the decision-making process. Therefore, leaders and managers can make informed decisions and make long terms cost savings, by making the right decision, based on the correct information presented in a reader-friendly and understandable format.

Too often reports lack clarity, credibility and objectivity. Participants will consider best practice in writing effective advanced reports for use in everyday situations and more complex projects over a longer term.

The aim of this practical advanced course is to equip participants with the tools and knowledge to improve the content, structure and style of advanced report writing, in order to assist managers and leaders to make more informed decisions in a timely manner.

Course Objectives

By the end of this course, participants will be able to:

- Highlight the importance of performance standards, goals and objectives.
- Recognise how reports fit with other influencing activities as a strategic process
- Identify the different types of reports they may have to write
- Use several techniques to prepare for writing a report
- Establish the correct scope and depth for a document
- Demonstrate the use of mind mapping to organize the ideas of a report
- Identify the anatomy of a report and write its content
- Define precise communication objectives in relation to the report's audience
- Make a revision checklist for revising a report
- Assess their performance in applying the steps of writing a report

Content

A sample of what is covered includes:

What are reports all about?

In this session, participants will first be able to share their experience level and state their own personal objectives which will help the trainer plan the focus areas for the course and also pitch the content at the right level for each individual participant. They will then undertake a number of individual and group exercises to help them create a more informative report and also avoid some of the common pitfalls in written communication in English. Some core communication principles will be re-visited and more in-depth considerations added

- Welcome and establish participants' needs and experience
- Some tools for creativity - interactive exercises
- The Seven Rules of Report Writing
- Accuracy, brevity, clarity
- The essentials of good English
- Checking the basics - words, sentences, paragraphs (the Fog and Flesch index)
- Spelling and punctuation essentials

- Common grammatical posers
- Active versus passive voice, personal or impersonal style
- Saving the reader time
- Consistency
- Academic and commercial style - where to aim for to meet customers' needs and wants

Types of Reports

This session will involve a group exercise and discussion to find out what types of report each participant is involved in writing on a daily, weekly, monthly, and annual basis. It will look at the reason for the report and whether a report is the correct way to convey that information to the end reader.

- Types of reports - exercise
- Advantages and disadvantages of these reports

Purposes of Reports - Establishing performance standards, goals and objectives

This session will look at the need for reports and establish the terms of reference for report writing. All reports should start with setting the objective for the report, what the report is to achieve (a decision, information transfer, selling an idea or project) and must be written with the specific readers in mind, whether primary or secondary.

- Purpose and readership
 - Terms of reference
 - Objectives/purpose
 - Questions to ask yourself
 - Means & methods to use
 - How your goal affects your message
 - Readership

Steps for Creating a Report

This session will form the main session of the course. It will set out the key stages needed to compile a detailed and complex report for managers and leaders alike. It will contain all the necessary data for a detailed record of the facts and also provide an Executive Summary for decision makers to act on the detailed information in the most informed and timely way.

Step 1 - Prepare the report

- What to clarify before you begin
- Getting started and removing writer's block
- What to ask before you begin - a clear brief
- Systematic stages of working
- Carrying out the plan
- A consistent approach
- Where to start
- Sources of information and how to collect it
 - Interviews
 - Focus groups
 - Questionnaires
 - Meetings
- Distinguishing between fact and opinion
- Mind mapping
 - Mind mapping laws
- Brainstorming

Step 2 - Organise the Report

- Deciding what to include/what to delete - focussing on key points and presenting the right amount of detail
- Structuring different types of business documents
 - What should your report look like?
 - The elements
 - A simple approach
 - The specifics of a technically complex report
 - From Executive summary to Glossary/Bibliography
- Practice sessions

Step 3 - Write the Report

- Writing for results
 - Analysis of participants' own writing styles - the Fog index
 - Qualitative analysis
 - Quantitative analysis
- Differences between Features, Advantages and Benefits - selling the idea or getting a decision made
- Making figures tell a story
 - Graphs, charts, pictures and diagrams
 - Group exercise to convert data to diagrams
- Producing logical arguments, giving answers and relating ideas
- Considering visuals
- Appendices and attachments
- Layout - formal, informal
- The importance of conclusions and recommendations - using knowledge and analysis and when to use creativity
- Using an appropriate 'voice' in one's writing
- Liability - protecting oneself and the organisation

Step 4 - Revise the Report

- Types of writing
- Revision
- How to edit
 - What to check for
 - Proof-reading
- Checklists to cover all the bases
- Skills Practice using

Step 5 - Produce the Report

- Presentation
 - Presenting the report
 - What to think about
 - Graphics & layout
 - Get the message across
- Execution
 - SPACE
 - Tools and techniques
- Impact and message

- Getting the message over fast
- Executive summaries and précisés - the final piece
- Headings and script writing techniques
- Using the report as a presentation tool - handouts vs PowerPoint
- Sequencing alternatives and options
- Experimenting with new ideas
- Influence - science and practice

Step 6 - Save & Send the Report

- Document control
 - Lead times
 - Version control/shared access
- Report Constructive Self-Assessment Checklist
- Final skills practice
 - Putting it all together using a pre-prepared case study/scenario

