

ELS

Effective Learning Service



Report Writing

PLEASE NOTE

The type of report described in this leaflet is a business report, and the guidelines provided are not intended to be regarded as firm 'rules'. Reports can be structured in many different ways and can take many different forms; however, there are many report writing templates available on most word processing programmes such as Microsoft Word which you can use if you want to.

This leaflet provides a model for how a report could be structured and laid out.

However, this is only a rough guide. For more detailed instructions please refer to the assignment guidelines you have been given, or contact your lecturer.

EXECUTIVE SUMMARY

This is a guide to writing a report which takes the form of a report. It gives information about what reports are designed to do and the different sections that a report usually contains. It provides details on what should be included in each section and specifically about what is included in the Executive Summary. It also lists some of the main differences between reports and essays. It goes on to explain how to lay out a report and about what a report should look like. It gives advice on: how to use headings; how to number the pages; how to use bullet points correctly; and how to use and refer to appendices. In addition it makes recommendations on what to check before submitting a report. An example of a good executive summary for a marketing report is given in Appendix A, and a list of some of the common mistakes to avoid when writing an executive summary is provided in Appendix B.

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1 INTRODUCTION

1.1 What do reports do?

Reports inform. Their purpose is to convey information, and not to construct a debate. This is different to an essay. Some of the main differences between reports and essays can be seen in Table 1 below:

Table 1. The main differences between reports and essays

	A report...	An essay...
Function	presents information is used to take decisions or account for actions is meant to be scanned quickly by the reader	presents an argument and is idea-based is used to demonstrate knowledge, understanding and critical analysis is meant to be read carefully
Structure	formally structured uses numbered headings and sub-headings uses short, concise paragraphs and bullet points uses tables and/or graphs and bullet points may need an abstract (also known as an executive summary) may need to be followed by recommendations and/or appendices	semi-structured does not usually contain sub-headings or bullet points does not use as many graphs or tables offers conclusions about a question will only need an abstract if very long

(adapted from: Burns and Sinfield, 2010, p.291)

Reports are intended to be read quickly and for a specific reason, so it is essential to make the information as easy to find as possible and as easy to understand as possible.

1.2 Appearance

All reports have a similar appearance because of the fairly standard way the information they contain is arranged. They usually follow this pattern:

- Executive Summary
- Contents List
- Introduction
- 'Body'
- Conclusion
- Recommendations
- Reference List
- Appendices

A report should have headings, sub-headings, numbered sections, bullet points, and diagrams, but not many lengthy 'blocks' of uninterrupted prose.

2 SECTIONS OF A REPORT

2.1 What goes into the Executive Summary/Abstract?

An executive summary gives the reader a general overview/summary of the whole report. It usually includes:

- the background to the report
- the purpose of the report
- the scope and limits of the report, including brief details of the methods used
- the important findings/results of the investigation and any conclusions drawn from these results
- recommendations for action, if required
(Charles Darwin University, 2012)

All this is done in continuous prose; the Executive Summary is the only part of the report where bullet points are not used; instead descriptive or discursive language is used.

After reading this section, the readers will have a good idea of what the report is about. If they need more background information, the Introduction will provide this.

2.2 What does the Contents List look like?

There is an example of a Contents List after the Executive Summary above. Note that 'Recommendations' may not be required in a university assignment; the assignment guidelines should make this clear.

2.3 The Introduction

This should orientate the reader to the whole document, and give the report a context. It should help to answer these questions:

- **why** this topic is being investigated
- **why** the report was requested and **by whom**
- **what** issues are covered in it, **what** issues are not covered and **why**
- **how** the topic was investigated

It may sometimes be useful to include the 'Terms of Reference' (ToRs), which set out the scope of the report. The Introduction may also contain a definition of any key terms or terminology which is used.

The Executive Summary and the Introduction often contain some similar information; this is not a problem.

2.4 The Body

As in an essay, the body is the largest part of the report. However, in a report the information should be presented as economically as possible, often through the use of bullet points.

2.4.1 Using bullet points

Bullet points must be carefully 'designed'.

Bullet points have a specific purpose, depending on the context in which they are used. The following sentence (about using bullet points) shows how they work:

Bullet points perform a range of functions, including:

- giving examples
- providing focus



There **must** be an explanation given between the heading and the bullet points, for example:

Using bullet points

There is general agreement that amongst the main advantages of bullet points is their ability to:

- save words
- improve ease of comprehension
- improve visual appeal



Bullet points cannot stand alone; they must be introduced, so their use in **the following example is quite wrong:**

Using bullet points

- to save words
- to make the report look better



2.4.2 *Bullet points and grammar*

Bullet points should be grammatically consistent. This means that they should all grammatically follow the introduction, and they should all have the same format. In fact, as the following examples demonstrate the same information can be given in many different ways.

Example one:

The programme is divided into four stages:

- raising awareness through in-house training
- auditing suppliers
- applying corrective actions to improve conditions
- monitoring programmes through surprise visits to check the improvements

Example two:

There are four stages in the programme. These are:

- to raise awareness through in-house training
- to audit suppliers
- to apply corrective actions to improve conditions
- to monitor programmes through surprise visits to check the improvements

Example three:

There are four stages in the programme, namely:

- the use of in-house training to raise awareness
- an audit of suppliers
- the application of corrective actions to improve conditions
- the monitoring of programmes through surprise visits to check the improvements

The important thing to note here is consistency, all the bullet points must have the same grammatical form; that is they must ***all*** start the same way.

2.5 Concluding and making recommendations

The really important parts of 'real world' reports, the parts which most readers will look at, are the Conclusion (which summarises what the research has shown), and the Recommendations, which demonstrate how what has been learnt can be applied. Some reports do not require recommendations: the Terms of Reference or the assignment guidelines will make clear whether any practical outcome, and so 'recommendation', is expected. If the ToRs do this, then the recommendations section is the most important part of the report for those who commissioned it.

The recommendations must be both relevant and feasible and cover:

- **what** needs to be done
- **who** needs to do it
- **how, when** and **where** it needs to be done
(University of Melbourne, 2010)

3 GUIDANCE ON NUMBERING, PAGE NUMBERS, HEADINGS AND USING BOLD

3.1 Numbering

Note that the Executive Summary, Contents List, Reference List and Appendices are *not* numbered. With these exceptions, all parts of a report should be numbered. Numbering is essential in reports as it allows the reader to find information quickly.

Each numbered section *must* have a title, and this heading or sub-heading should give the reader a good idea of what is contained in that section.

3.2 Page numbers

The Executive Summary and the Contents List do not have page numbers. The pages of a report are numbered from the page which contains the Introduction, so 'Introduction' always begins on page 1. Page-numbering stops at the end of the last main section ('Conclusions' or 'Recommendations'), so the Reference List and Appendices do not have page numbers either.

3.3 Headings

The main headings are *not* allocated a page number when these sections are divided into sub-sections. Therefore, of the main section headings in the Contents List above, only '6 Recommendations' has a page number because only this section is not subdivided. Similarly, subheadings are not given a page number where they are themselves subdivided.

3.4 Using bold

Only certain elements are usually printed in bold. These are:

- all main section headings and their numbers ('6 RECOMMENDATIONS')
- all sub-section headings and their numbers ('3.4 Using bold')
- sub-headings which themselves are further subdivided ('4.2.1 Referring to the Appendices')

4 MAKING A REPORT LOOK GOOD

4.1 Layout of individual sections

Each heading and subheading, and the accompanying numbering, should be printed in bold, and BLOCK CAPITALS are often used for section headings. In addition, a system of 'tabbing', consistent with that used on the Contents Page above is often used in the report itself.

This means that a section heading (e.g. '1 INTRODUCTION') would be on the left margin; '1.1 What do reports do?' would start immediately under the start of the word INTRODUCTION, as would the written content of that sub-section. Note that the contents of any section with no subdivision (e.g. '6 RECOMMENDATIONS') will stay on the left margin throughout the section.

The proper and consistent use of 1.5 line-spacing and double-spacing between sections, further improves the appearance of the report, and makes the individual sections easier to find and to follow.

Every number must have a title. This is important not only for consistency, but also for clarity.

4.2 Appendices and 'visual' content

4.2.1 Referring to the Appendices

There may be diagrams or tables that are too large to fit on one page; in this case they may be placed at the end of the report, as an *Appendix*. It is normal for a report to have appendices. Any information or material given in an appendix must be referred to in the text as follows:

For a full break down of the market share and the annual sales of the four leading brands in 2013 please refer to appendix C.

4.2.2 Using tables, figures, diagrams, etc.

It is normal to use tables, graphs and diagrams in the body of a report. They can usually express information economically (important when there is a word-limit), and in an easier to understand way than prose. They can also improve the appearance of a report. All such items should be properly 'labelled' (i.e. have a title) and the source of the information in them should be acknowledged, as in Table 1 below:

Table 1. Students registered at QMU in 2011 to 2012:

STUDENT DISTRIBUTION BY AGE AND GENDER				
2011 - 2012 (excludes overseas collaborations)				
Age	<21	21-30	30+	Total
Male	23.5%	29.8%	22.7%	76%
Female	5.9%	9.3%	8.8%	24%
Total	29.4%	39.1%	31.5%	100%

(QMU, 2013)

The source, 'QMU 2013', would then appear in the Reference List. If the contents of the table or diagram are completely the student's own work then there is no need for an acknowledgement or reference; an example of this is given in Appendix C.

5 GOOD SCHOLARSHIP IN REPORT WRITING

As the report is a piece of academic work this means that the same rules which apply to essays also apply here; namely:

- word limits must be respected
- a formal style must be used
- the language should be of a good, intelligible, standard
- all sources must be cited and referenced (unless instructed otherwise)

5.1 Citation and the Reference Page

Unless there is a specific instruction otherwise all reports at QMU must contain appropriate citation and referencing in the Harvard Style

For all details of referencing, please refer to the University's guide, **Write and Cite**, which is available on the library website or can be bought at the LRC front desk.

The reference page for a report will look exactly the same as one produced for an essay. However, when referencing in the text of a report it is better to use 'information-prominent' citation, where the source is simply mentioned at the end of the phrase or sentence, as in this example:

Online events are:

- globally accessible and greener (Biba, 2007)
- low-cost and convenient (Woolard, 2010)

This is in contrast to the author prominent citation often found in essays:

According to Biba (2007), online events are globally accessible and greener, while Woolard (2010) adds that they are also low-cost and convenient.

6 RECOMMENDATIONS

Before submitting any report there are a number of areas that should be checked, and a number of questions that need to be answered:

- Is there enough 'white space'?
- Is it in Times New Roman, size 12 or Arial size 11, and 1.5 line-spaced, with a 'starter' margin (i.e. before any indentations are made) of 2.5 cm?
- Is it written in formal language?
- Is the numbering effectively done?
- Is indentation in the numbered sections consistent throughout?
- Is the use of block capitals, bold, etc. consistent?
- Are headings and sub-headings used appropriately?
- Is each page numbered? (except, of course, for those excluded from numbering)
- Is there a new page for the Executive Summary, the Reference Page and the appendices?
- Are large diagrams properly placed on one page? (They must never be divided over two pages)

A fuller checklist to go through before submitting a report is provided in Appendix D.

REFERENCE LIST:

Biba, E. (2007) 'Virtual events' success grows', *B to B*, October, 92 (13), p.14.

Burns, T. and Sinfield, S. (2012) *Essential study skills: the complete guide to success at university*. 3rd ed. London: SAGE Publications Ltd.

Charles Darwin University (2012) *Analytical report format & structure*. Available at: http://www.cdu.edu.au/sites/default/files/Report-Structure-and-Format_ALLSP_2012_000.pdf (Accessed: 7 February 2014).

Gaertner-Johnston, L. (2013) 'Write Better Executive Summaries', *Business writing Blog*, 29 May. Available at: http://www.businesswritingblog.com/business_writing/2013/05/write-better-executive-summaries.html#sthash.1x32OoFt.dpuf (Accessed: 7 December 2016).

QMU (2013) *Facts and figures 2013*. Available at: <http://www.qmu.ac.uk/marketing/university/pdf/Facts-Figures2013.pdf> (Accessed 6 February 2014).

Unilearning (2000) *Report Writing*. Available at: <https://unilearning.uow.edu.au/report/4bi1.html> (Accessed: 7 December 2016).

University of Melbourne., 2010. *Business reports factsheet*. Available at: http://sydney.edu.au/business/___data/assets/pdf_file/0008/90359/Txt_business_reports.pdf (Accessed 7 February 2014).

Victoria University of Wellington., 2013. *How to write a business report*. Available at: <http://www.victoria.ac.nz/vbs/teaching/publications/VBS-report-writing-guide-2013-July.pdf> (Accessed: 6 February 2014).

Woolard, C. (2009) 'Economy drives interest in more complex virtual events', *B to B*, March, 94 (3), p.22.

This is a **GOOD** example of an executive summary from a marketing report.

<p>This report was commissioned to examine why the sales volume of Choice Chocolate has dropped over the past two years since its peak in 1998 and to recommend ways of increasing the volume.</p>	<p>Terms of reference Statement of problem/ topic</p>
<p>The research draws attention to the fact that in 1998, the market share of Choice Chocolate was 37%. The shares of their key competitors such as Venus and Bradbury were 22% and 18% respectively. The size of the chocolate market then was \$36 million. Over the next two years, although Choice Chocolate retained its market share the volume of sales in the whole market decreased to \$29 million. Further investigations reveal that this market shrinkage coincided with an increase in health awareness amongst consumers who regard the milk and sugar ingredients in chocolate as negative; moreover, since the second half of 1999, an increasing number of rival 'health candies' had appeared on the market. These claimed to offer the consumers a healthy alternative. These factors appear to be the major causes of the decreased sales volume of Choice Chocolate.</p>	<p>Key findings summarised</p>
<p>Slim Choice is the latest chocolate range put forward by the R & D Department of Choice Chocolate. The report evaluates this range and concludes that it would be an ideal candidate to meet the challenge presented by the market and could satisfy the new consumer demand since it uses significantly reduced milk and sugar ingredients and is endorsed by renowned health experts. According to 97% of the 2000 subjects tested recently, it also retains the same flavour as the original range.</p>	<p>Problem/solution summarised</p>
<p>It is recommended:</p> <ul style="list-style-type: none">• that Choice Chocolate take immediate measures to launch and promote Slim Choice alongside its existing product range• that Slim Choice adopt a fresh and healthy image• that part of the launch campaign contains product endorsement statements by renowned health experts• that Slim Choice be available in health food shops as well as in traditional chocolate retail outlets	<p>Recommendations summarised</p> <p>These do not have to be bullet points. Choose a style which is appropriate for what you are writing</p>

(Source: Unilearning, 2000).

APPENDIX B

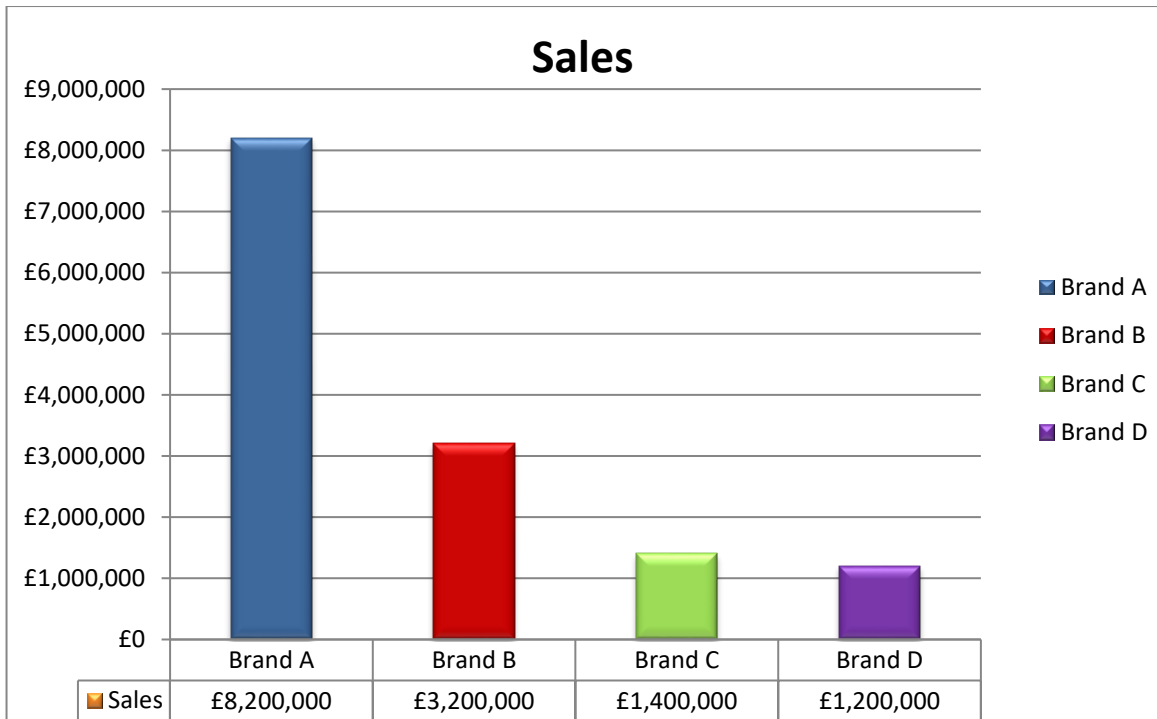
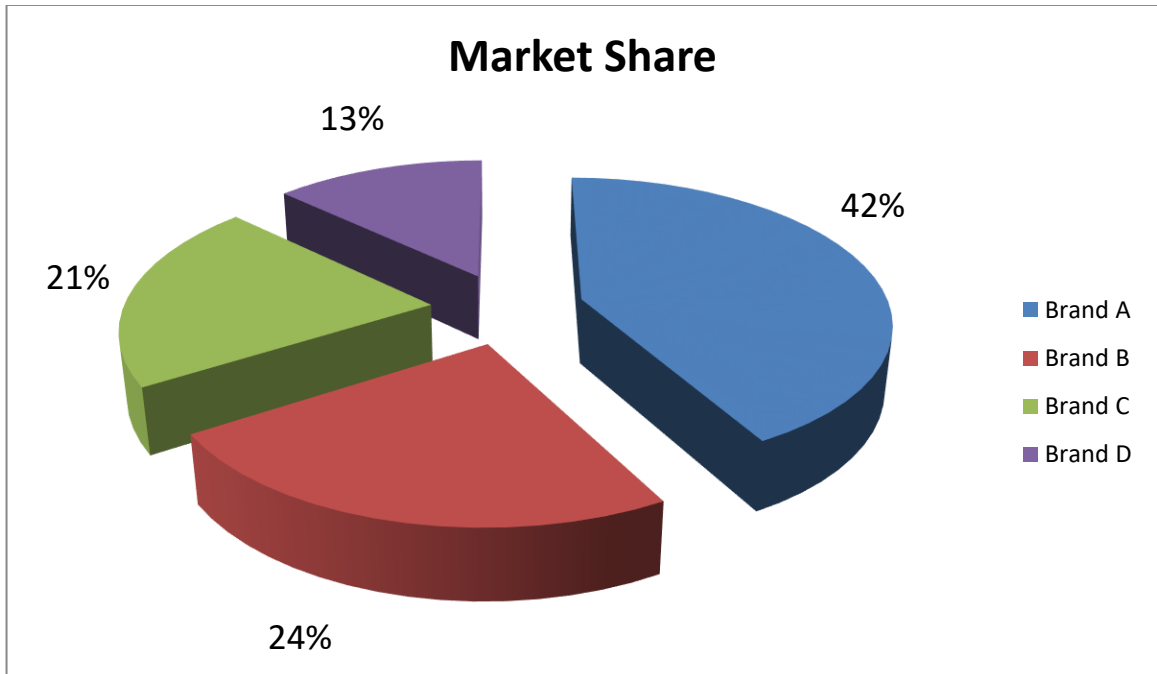
What are some of the common mistakes writers make in executive summaries?

1. Repeating the content of the executive summary almost word for word near the beginning of the report.
2. Providing too much background in the summary. Background belongs in a background section or an introduction, not in the summary.
3. Providing too much detail in the summary. Details belong in the body of the document.
4. Using different terms in the executive summary from those in the report. If the summary mentions findings, the report should include findings, not observations. If the summary cites results, the report should describe results, not outcomes.
5. Having a mismatch in content. Whatever the executive summary highlights must be included in the report. Likewise, the report should not contain major points that did not appear in the summary.
6. Including too little or too much in the executive summary. Executive summaries should run from one paragraph to one page, covering only the essential findings, results, or recommendations.
7. Repeating the executive summary almost word for word in the conclusion. If a report contains a conclusion, it should be a wrap-up that drives home the main points, not an executive summary that highlights them.

(Source: Gaertner-Johnston, 2013).

APPENDIX C

Market share and sales for the four leading brands in 2013



APPENDIX D

Checklist for a business report

- The report fulfils its purpose
- The report is oriented to the intended reader/s
- The report contains all appropriate elements (executive summary, table of contents, appendices...)
- The discussion has descriptive and appropriately formatted headings and subheadings
- The discussion contains thorough analysis of findings as well as logical flow
- The report has been edited for section cohesiveness and good paragraph structure
- The report has been proofread for sentence structure, spelling, punctuation, and consistency
- Tables and figures are formatted correctly and labelled
- Tables, figures, and appendices are referred to within the text / discussion
- Quotations from other sources are referenced
- Thoughts and ideas paraphrased from other sources are referenced
- The reference list is formatted properly
- The cover page has all necessary details
- Appendices are used to support the discussion, but tables / figures which are essential to the discussion are included within the text

(Source: Victoria University of Wellington, 2013).