

16: Business Reports - Part 1

Chapter Objectives

The purpose of this chapter is to:

- Define the purpose for writing progress, summary, and recommendation reports
- Explain the differences between secondary and primary research
- List the main sections to include in recommendation reports
- Explain the voice and tone to use in report writing
- Analyze content to determine reliability

The Function of Business Reports

The purpose of business reports is to communicate facts and ideas. In order to accomplish that purpose, each report has key components that need to be present in order for your reading audience to understand the message. Reports vary by function, style, and tradition. Within your organization, you may need to address specific expectations. This chapter discusses reports in general terms, focusing on common elements and points of distinction.

You need to be flexible and adjust your report to the needs of the audience. Reports are typically organized around six key elements. These elements hold true for all business reports.

1. Who the report is about and/or prepared for
2. What was done, what problems were addressed, and what are the results, 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

If you have these elements in mind as you prepare your document, it will be easier to decide what to write and in what order. These points will also be useful as you review your document before delivering it. If your draft omits any one of these elements or addresses it in an unclear fashion, you will know what you need to do to improve it.

Business report writing is considered formal writing. The formality of reports pertains to the business writing conventions of detailed content, citation, documentation, format, organization, and style. Formality requires writers to support the report with thorough evidence and complete content. Although your report is written for a primary audience (your supervisor, for example), the primary audience may share the information with others. Therefore, it is important to compose information that addresses the needs of readers with varying knowledge levels.

Types of Business Reports

The way a report is organized depends on its type and purpose. There are many types of reports, but this chapter focuses on three types common to the workplace:

- Progress Report
- Recommendation Report
- Summary Report

Other types of reports include:

- Short Informational Reports
- Short Analytical Reports
- Proposals (next chapter of this book)
- Formal Business Reports

An explanation of, purpose for, and sections of each business report follows.

Progress reports include the following topics:

- Use a reporting and explanatory voice throughout the progress report. You may use first person pronoun "I" sparingly in the introduction and conclusion if you performed or plan to perform specific tasks; this is acceptable because you are explaining the status of what you accomplished or plan to accomplish.

The problem/situation statement may be only two or three paragraphs; however it supports the entire report. The information is organized from specific to concrete. The topic is introduced and defined in statement of the problem and builds by including specific and concrete information to support the topic and the report's purpose. The discussion builds by presenting the cause and effect of the problem/situation. Information focuses on what caused a specific situation and its results, which are the effects.

Pay attention to these essential elements when you consider your stakeholders. That may include the person(s) the report is for, and the larger audience of the organization. Ask yourself who the key decision makers are, who the experts will be, and how your words and images may be interpreted. 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, playing an important role in the transmission of information.

2. Title Page	<p>Label, report, features title, author, affiliation, date, and sometimes for whom the report was prepared</p> <p>The title page of your paper includes the following information:</p> <ul style="list-style-type: none"> • Title of the paper • Author's name • Name of the company with which the author is affiliated • Header at the top of the page with the paper title (in capital letters) and the page number (If the title is lengthy, you may use a shortened form of it in the header.). <p>List the first three elements in the order given in the previous list, centered about one-third of the way down from the top of the page. Use the headers and footers tool of your word-processing program to add the header, with the title text at the left and the page number in the upper-right corner.</p>	
3. Table of Contents	<p>A list of the main sections and their respective page numbers.</p> <p>When including a Table of Contents (ToC) in the report, the headings must be worded the same in both locations.</p>	
4. Headings	<p>Detailed section headings lead the reader to understand the focus and content of each section.</p> <p>Headings contain four to six words. Headings are parallel; each begins with the same grammatical structure. For example, each major heading is a question, a noun phrase, or a verb phrase.</p>	<p>APA style uses section headings to organize information, making it easy for the reader to follow the writer's organizational process and to know immediately what major topics are covered. Depending on the length and complexity of the paper, its major sections may also be divided into subsections, sub-subsections, and so on. These smaller sections, in turn, use different heading styles to indicate different levels of information. In essence, you are using headings to create a hierarchy of information. The following heading styles used in APA formatting are listed in order of most important to least important:</p> <ol style="list-style-type: none"> 1. Section headings use centered, boldface type. Headings use title case, with important words in the heading capitalized. 2. Subsection headings use left-aligned, boldface type. Headings use title case. 3. The third level uses left-aligned, indented, boldface type. Headings use a capital letter only for the first word, and they end in a period. 4. The fourth level follows the same style used for the previous level, but the headings are boldfaced and italicized. 5. The fifth level follows the same style used for the previous level, but the headings are italicized and not boldfaced.

5. Abstract	<p>Informational abstract: Highlight topic, methods, data, and results.</p> <p>Descriptive abstract: All of the above without statements of conclusion or recommendations.</p>	<p>A brief summary of your findings. You may not need to provide an abstract in every paper, but you should use one in papers that include a hypothesis. A good abstract is concise—about one hundred to one hundred fifty words—and is written in an objective, impersonal style. Your writing voice will not be as apparent here as in the body of your paper. When writing the abstract, take a just-the-facts approach and summarize your research question and your findings in a few sentences.</p>
6. Introduction	<p>Introduces the topic of the report by including a problem/situation statement. The problem/situation statement may be only two or three paragraphs; however it supports the entire report. The information is organized from specific to concrete. The topic is introduced and defined in statement of the problem and is expanded in the body paragraphs.</p>	
7. Body	<p>Key elements of body include:</p> <ul style="list-style-type: none"> • Background • Methodology • Results • Analysis and Recommendations 	
8. Conclusion	<p>Concise presentation of findings.</p>	<p>Indicates the main results and their relation to recommended action or outcome.</p>
9. References	<p>List of resources with bibliographic details.</p>	<p>List of citations.</p>
10. Appendix	<p>Related supporting materials.</p>	<p>May include maps, additional visuals, analysis of soil samples, field reports, etc.</p>

Summary Report

A summary report is used to inform management of an outcome. For example, if you work in the marketing department, your boss might ask you to find out about your competitors' online activities so that your company can effectively compete with them. To do this, you would research your competitors' websites, social media profiles, digital advertising campaigns, and so on. You would then summarize your findings to the key points so that your boss can get the essential information and then decide how to act on it. Unlike the recommendation report, the summary report focuses on the facts, without providing solutions, leaving it to management to decide on a course of action.

The following table presents an outline form that may be used for summary reports. You can use this format as a model or modify it as needed.

Element	Contents
Introduction	General purpose, problem/situation statement, or thesis statement
Body	Point 1:

	Point 2:
	Point 3:
Conclusion	List the main points

No matter what your business writing project involves, it needs to convey a central idea. To clarify the idea in your mind and make sure it comes through to your audience, write a problem/situation statement. A problem/situation statement, or central idea, should be detailed and concrete. This statement is key to the success of your document. If your audience has to work to find out what exactly you are talking about, or what your stated purpose or goal is, they will be less likely to read, be influenced, or recall what you have written. By stating your point clearly in your introduction, and then referring back to it in the body of the document and at the conclusion, you will help your readers to understand and remember your message.

Use FAST: Format, Audience, Style, Tone to Format Business Reports

Business report writing features specific format, style, and tone techniques that address the needs of the audience. Here are the distinctive features.

When composing your business documents, you will first have to decide which **format** best suits your purpose. The medium is the message. Similarly in this case, the format you choose for your business document should also align well with the purpose of your message. For example, an email might be considered semiformal depending on its subject, audience and purpose. A business letter is usually considered quite formal as are memos and short reports. Knowing what you've recently learned about the common types of business documents, you must remain mindful that the format you choose tells the audience something about the information they will receive and how important or serious it is for them to pay attention to it.

Once you have chosen the appropriate format for your message, it is also important to ensure that the formatting is correct. For example, if you intend to send the summary report via email, it should not look like an informal email. It needs to be clear to the reader what format you are using and you can make that apparent by ensuring the appropriate formatting of your document.

Make it easier for your reader to comprehend the information in your report by formatting your document cleanly. APA style requirements also address specific formatting concerns, such as margins, pagination, and heading styles within the body of the paper. Review the following APA guidelines:

- Set the top, bottom, and side margins of your paper at 1 inch.
- Use double-spaced text throughout your paper.
- Use a standard font, such as Times New Roman or Arial, in a legible size (10- to 12-point).
- Use continuous pagination throughout the paper, including the title page and the references section. Page numbers appear flush right within your header.
- Section headings and subsection headings within the body of your paper use different types of formatting depending on the level of information you are presenting.
- Separate paragraphs using white space
- Use visuals (charts, graphs, photographs, diagrams, etc.) where they will help in explaining numbers or other information that would be difficult to understand in text.

Note: If applicable, follow your employer's style guide standards.

Audience

Your **primary audience** remains central to your messaging. A helpful approach some writers use is to try to put themselves in the primary audience's shoes and ask, *What's in it for me?* or *Why should I care?* or *So what?* Identifying the audience and being aware of their needs will help you draft a document that is more likely to get their interest.

Style

Style and tone are often considered interchangeable and there are some blurry distinctions between the two. **Writing style** refers to the compositional choices you make in content, word choice, organization, tone; and elements such as active versus passive writing, varied sentence lengths, flow, and punctuation choices. Style gives your writing a type of personality when coupled together with tone. As with the audience and format, it is important that the style you choose matches with the intended purpose of your message.

The information is composed in a reporting and explanatory tone. Word choice is professional and formal. Writers refrain from using “I” because it lacks an audience-centered perspective.

Overall, the style is the same as other business documents. Sentences are concise because they do not contain unnecessary words. Reliable sources are used to reinforce information. Sources and visuals are introduced and explained. Each paragraph contains a topic sentence. Transitions are used to link points.

Tone

Tone refers to the attitude your writing projects to your audience when they read your document. Here you would ask yourself if your tone is formal, informal, positive, negative, polite, direct, or indirect. The purpose of asking yourself this question is to determine whether the tone suits or otherwise enhances the purpose of your intended message.

The acronym FAST not only helps as a guide to remembering the importance of selecting the right format, remembering your audience, and ensuring appropriate style and tone but also helps you remember that in business writing it is important to get to the point—fast!

Here is a [handy tool](#) you can use to incorporate the principles of FAST as you draft a report.

Adding to Your Information Needs

The need for a report comes from conditions and circumstances within a business. It may be in response to a stakeholder's complaint or suggestion. Content for a report comes from the gathering of information. You will need to do your research to support and substantiate the purpose/problem statement. Writers of reports conduct primary and secondary research.

Primary Research

Start by consulting with colleagues who have written similar documents and ask what worked, what didn't work, and what was well received by management and the target audience. Your efforts will need to meet similar needs. In addition, your colleagues may be the source of information. One way to accomplish this goal is by conducting primary research. Examples of **primary research** include:

- Interviewing someone who is knowledgeable about the subject and presenting the answers in the report
- Distributing questionnaires or surveys and writing about the results in the report
- Observing relevant situations and writing about the results in the report
- Conducting experiments and writing about the conclusions in the report

You might even know someone who has experience in the area you want to research, someone who has been involved with the topic for their whole life. We do a lot of our reading and research online today, so getting information firsthand is probably not the first method that comes to mind—but talking to an expert directly will give you insight into a topic that no website can compete with.

Secondary Research

Secondary sources refer to reliable information and data written by other writers. These include books, academic journals, trade journals, electronic newspapers, and reliable websites. Use secondary sources to substantiate points you made in the report. For example, to support recommendations, solutions, needs, and data. Review the information sources you already have in hand. Do you regularly read a trade journal that relates to the topic? Was there an article in the newspaper you read that relevant to the report? Is there a book, website, or podcast that has information you can use?

Evaluating Secondary Sources of Information for Validity, Reliability, and Credibility

One aspect of Internet research that cannot be emphasized enough is the abundance of online information that is incomplete, outdated, misleading, or downright false. Anyone can put up a website; once it is up, the owner may or may not enter updates or corrections on a regular basis. Anyone can write a blog on any subject, whether or not that person actually has any **expertise** in the area. Therefore, it is always important to look beyond the surface of a site to assess who sponsors it, where the information came from, and whether the site owner has a certain agenda. When you write for business and industry you will want to draw on reputable, **reliable sources**—printed as well as electronic ones—because they reflect on the **credibility** of the message and the messenger.

Credibility Checklist

When you are looking at a web source, here are some things you should keep in mind when trying to identify the source's credibility:

- **Who wrote the material?** Look for an author's name or company logo. Look up the person/company elsewhere to see what you can find out about them. Also look for any contact information on the website, such as an address or phone number. If the organization is of questionable origins, they are less likely to provide direct contact details.
- **Who owns the website?** You can use web domain lookup tools (like [Who.is](#), for example) to find out who the owner of the web domain is and how long they have owned the domain. This may help you to decipher who is behind the message.
- **Is the material recent?** You might notice a "last updated" date across the bottom of the website or a date attached to the article. If the information is timely or focuses on a highly changeable topic (technology or medical research, for example), you'll want the most recent information you can find.
- **How is the material laid out?** While not a definitive clue to authenticity, a poorly designed website full of flashing banners and clip art might quickly tell you that you're not looking at the most reputable source.
- **What is the website doing with your information?** Any websites that process payments or collect any user data are required to tell you what they collect and what they are doing with this information, though a cookie alert and perhaps also through a Terms and Conditions page or Privacy Policy. Look for these on any website before you give out personal details of any kind.
- **How is the website viewed by the wider community on the web?** Search for the website's name and any company names or author names you find on the site, using search engines and social media. Can you find any reviews? Has the website been pointed to as a credible resource via social media sharing?

In-Text Citations (Citation)

Throughout the body of your paper, include a citation whenever you paraphrase, quote, or summarize material from your research sources. The purpose of **citations** is twofold: to give credit to others for their ideas and to allow your reader to follow up and learn more about the topic, if desired. Your in-text citations provide basic information about your source; each source you cite will have a longer entry in the references section that provides more detailed information.

In-text citations must provide the name of the author or authors and the year the source was published. (When a given source does not list an individual author, you may provide the source title or the name of the organization that published the material instead.) When directly quoting a source, you are also required to include the page number where the quote appears in your citation.

This information may be included within the sentence or in a parenthetical reference at the end of the sentence, as in this example for a recommendation report to limit snack choices in the company cantina.

Example:

Epstein (2010) points out that "junk food cannot be considered addictive in the same way that we think of psychoactive drugs as addictive" (p. 137).

Here, the writer names the source author when introducing the quote and provides the publication date in parentheses after the author's name. The page number appears in parentheses *after* the closing quotation marks and *before* the period that ends the sentence.

References List (Documentation)

The brief citations included in the body of your paper correspond to the more detailed citations provided at the end of the paper in the references section. In-text citations provide basic information (the author's name, the publication date, and the page number if necessary), while the references section provides more extensive bibliographical information. Again, this information allows your reader to follow up on the sources you cited and do additional reading about the topic if they so desire.

The specific format of entries in the list of references varies slightly for different source types, but the entries generally include the following information:

- The name(s) of the author(s) or institution that wrote the source
- The year of publication and, where applicable, the exact date of publication
- The full title of the source
- For books, the city of publication
- For articles or essays, the name of the periodical or book in which the article or essay appears

- For magazine and journal articles, the volume number, issue number, and pages where the article appears
- For sources on the web, the URL where the source is located

The references page is double spaced and lists entries in alphabetical order by the author's last name. If an entry continues for more than one line, the second line and each subsequent lines are indented five spaces.

Ethical Consideration

Write and document your composition. You are the writer, not compiler of information. This rule is a step toward avoiding plagiarism.

Information that is well known, appears in multiple sources, and easy to verify is known as **common knowledge**. An example of common knowledge is Kamala Harris is the Vice President of the United States.

Ethical Consideration

When you are unsure, cite and documentation information; err on the side of clarity and transparency.

Check Your Understanding of Business Reports

Read the scenario below and answer the following questions.

Jean is a supervisor in a large agricultural equipment manufacturing facility. The facility has several different departments for different tasks such as fabrication, welding, assembly, and painting. Orders come in through the computer system, which starts a series of tickets for workers, indicating to the workers which and how many parts to produce to fulfill an order. The most recent order was distributed through the ticketing system three weeks ago and has still not been completed. This order should have taken only two weeks to complete. Jean identified that there is a problem in the fabrication department. It seems that the group of new hires are not fabricating parts within the tolerances set by the engineers, which is causing problems at the time of welding and sometimes as far down the line as assembly.

Jean needs to communicate the current state, her assessment of the production issues, and provide an estimated time for completion to her superiors. Which report would she write to accomplish this?

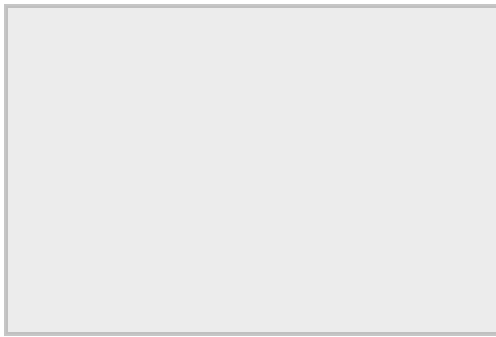
- a) a progress report
- b) a recommendation report
- c) a summary report

Jean believes that she has a solution that will prevent these fabrication issues from occurring in the future. Which type of report would she use to describe what has been completed, what problems were encountered, and solutions to the problems?

- a) a progress report
- b) a recommendation report
- c) a summary report

Jean believes that she has a solution that will prevent these fabrication issues from occurring in the future. She would like to propose these solutions to her boss, Kim Kelly, but has encountered pushback from her boss before. Her boss has made it clear that Jean does not make decisions and that responsibility (or right) resides with Kelly. Which type of report would best suit Jean's needs and purpose?

- a) a progress report
- b) a recommendation report
- c) a summary report



Source: Photo by [Andrew Neel](#) on [Unsplash](#)

Conclusion

This chapter on writing business reports began with an explanation of reports, their purpose, and their function. Specifically, this chapter presented progress, recommendation, and summary reports. You then learned the topics to include in each report and distinguishable features. Finally, you were introduced to the acronym FAST as a tool to stay mindful of your document and content choices around format, audience, style, and tone.

With this new knowledge you should be well on your way to honing your workplace writing skills, which will further enhanced your ability to write effective business reports.

General Report Writing Tips

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

- Report considers the audience's needs
- Form follows function of 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 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 with clearly written details and explanation
- Reference to similar documents at your workplace may serve you well as you prepare your own report

All links live as of July 2021.

This work "Business Reports" is a derivative of "[Professional Communications OER](#)" by JR Dingwall, Chuck Labrie, TK McLennon, Laura Underwood is licensed under a [Creative Commons Attribution 4.0 International License](#). "Business Reports" is licensed under [CC BY](#) by [Valerie A. Gray](#).

16: Business Reports - Part 1 is shared under a [CC BY](#) license and was authored, remixed, and/or curated by LibreTexts.

- [14: Reports](#) is licensed [CC BY 4.0](#).