

5.5: Report

Learning Objectives

1. Discuss the main parts of a report.
2. Understand the different types of reports.
3. Write a basic report.

What Is a Report?

Reports are documents 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 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. A sales report, for example, 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. This chapter is designed to introduce you to the basics of report writing.



Figure 5.5.1: Choose a type of report by its function, and display the information in a vivid way that is easily understood. Pixabay – CC0 public domain.

Types of Reports

Reports come in all sizes, but are typically longer than a page and somewhat shorter than a book. The type of report depends on its function. The function of the report is its essential purpose, often indicated in the thesis or purpose statement. The function will also influence the types of visual content or visual aids, representing words, numbers, and their relationships to the central purpose in graphic, representational ways that are easy for the reader to understand. The function may also contribute to parameters like report length (page or word count) or word choice and readability. “Focusing on the content of your longer business documents is not only natural but necessary because doing so helps ensure complete, correct information” (Bovee, C., and Thill, J., 2010).

Reports vary by function, and they also vary by style and tradition. Within your organization, there may be employer-specific expectations that need to be addressed to meet audience expectations. This chapter discusses reports in general terms, focusing on common elements and points of distinction, but reference to similar documents where you work or additional examination of specific sample reports may serve you well as you prepare your own report.

Informational or Analytical Report?

There are two main categories for reports, regardless of their specific function or type. An informational report informs or instructs and presents details of events, activities, individuals, or conditions without analysis. 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 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 that 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. 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 to make recommendations on the treatment and quarantine of subjects.

Table 5.5.3 includes common reports that, depending on the audience needs, may be informational or analytical.

Table 5.5.1: Types of Reports and Their Functions

Type	Function
1. Laboratory Report	Communicate the procedures and results of laboratory activities
2. Research Report	Study problems scientifically by developing hypotheses, collecting data, analyzing data, and indicating findings or conclusions
3. Field Study Report	Describe one-time events, such as trips, conferences, seminars, as well as reports from branch offices, industrial and manufacturing plants
4. Progress Report	Monitor and control production, sales, shipping, service, or related business process
5. Technical Report	Communication process and product from a technical perspective
6. Financial Report	Communication status and trends from a finance perspective
7. Case Study	Represent, analyze, and present lessons learned from a specific case or example
8. Needs Assessment Report	Assess the need for a service or product
9. Comparative Advantage Report	Discuss competing products or services with an analysis of relative advantages and disadvantages
10. Feasibility Study	Analyze problems and predict whether current solutions or alternatives will be practical, advisable, or produced the desired outcome(s)
11. Instruction Manuals	Communicate step-by-step instructions on the use of a product or service
12. Compliance Report	Document and indicate the extent to which a product or service is within established compliance parameters or standards
13. Cost-Benefit Analysis Report	Communicate costs and benefits of products or services.
14. Decision Report	Make recommendations to management and become tools to solve problems and make decisions
15. Benchmark Report	Establish criteria and evaluate alternatives by measuring against the establish benchmark criteria
16. Examination Report	Report or record data obtained from an examination of an item or conditions, including accidents and natural disasters
17. Physical Description report	Describe the physical characteristics of a machine, a device, or object
18. Literature Review	Present summaries of the information available on a given subject

How Are Reports Organized?

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 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

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. 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.

Table 5.5.2: Ten Common Elements of a Report

Page	Element	Function	Example
1. Cover	Title and image	Like the cover of a book, sometimes a picture, image, or logo is featured to introduce the topic to the reader.	
2. Title Fly	Title only	This page is optional.	Feasibility Study of Oil Recovery from the X Tarpit Sands Location
3. Title Page	Label, report, features title, author, affiliation, date, and sometimes for whom the report was prepared		Feasibility Study of Oil Recovery from the X Tarpit Sands Location Peak Oilman, X Energy Corporation Prepared for X
4. Table of Contents	A list of the main parts of the report and their respective page numbers		<ul style="list-style-type: none"> • Abstract.....1 • Introduction.....2 • Background.....3
5. Abstract	<ul style="list-style-type: none"> • Informational abstract: highlight topic, methods, data, and results • Descriptive abstract: (All of the above without statements of conclusion or recommendations) 		This report presents the current status of the X tarpit sands, the study of oil recoverability, and the findings of the study with specific recommendations.

Page	Element	Function	Example
6. Introduction	Introduces the topic of the report		<i>Oil sands recovery processes include ways to extract and separate the bitumen from the clay, sand, and water that make up the tar sands. This study analyzes the feasibility of extraction and separation, including a comprehensive cost/benefits analysis, with specific recommendations.</i>
7. Body	Key elements of body include: <ul style="list-style-type: none"> • Background • Methodology • Results • Analysis and Recommendations 		<ul style="list-style-type: none"> • Background: History of oil extraction and separation from tarpit sands. • Methodology: Specific analysis of the site based on accepted research methods. • Results: Data from the feasibility study. • Analysis and Recommendations: Analysis of the data and recommendations based on that analysis.

Page	Element	Function	Example
8. Conclusion	Concise presentation of findings	This portion clearly indicates the main results and their relation to recommended action or outcome.	
9. References	Bibliography or Works Cited	This part contains a list of citations.	
10. Appendix	Related supporting materials	This may include maps, analysis of soil samples, and field reports.	

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

1. Report considers the audience's needs
2. Format follows function of report
3. Format reflects institutional norms and expectations
4. Information is accurate, complete, and documented
5. Information is easy to read
6. Terms are clearly defined
7. Figures, tables, and art support written content
8. Figures, tables, and art are clear and correctly labeled
9. Figures, tables, and art are easily understood without text support
10. Words are easy to read (font, arrangement, organization)
11. Results are clear and concise
12. Recommendations are reasonable and well-supported

13. Report represents your best effort
14. Report speaks for itself without your clarification or explanation

Key Takeaway

Informational and analytical reports require organization and a clear purpose.

Exercises

1. Find an annual report for a business you would like to learn more about. Review it with the previous reading in mind and provide examples. Share and compare with classmates.
2. Write a report on a trend in business that you've observed, and highlight at least the main finding. For example, from the rising cost of textbooks to the online approach to course content, textbooks are a significant issue for students. Draw from your experience as you bring together sources of information to illustrate a trend. Share and compare with classmates.

References

Bovee, C., & Thill, J. (2010). *Business communication essentials: A skills-based approach to vital business English* (4th ed.). Upper Saddle River, NJ: Prentice Hall.

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