

4.8.1: Formal Reports

Learning Objectives

- Define types of formal reports, including proposals
- Discuss different methods of sharing formal reports

Formal reports delve much deeper into a topic than an informal report. The label “formal” may intimidate some writers, but the formal report is an extension of business writing. You’ll use the same skills in all of your business communications—from the short, limited data email, to the informal report, to the formal report. While you may not need to write a formal report in your career, you will most likely see one and need to understand its components in order to effectively make decisions.

Types of Formal Reports

There are many different kinds of formal reports that you may encounter throughout your career. Here are a few of the more common kinds:

- **Research reports** gather and explain data; these reports are informational. Module 4: Research discusses research methods to obtain the data you’ll use in these reports.
- **Proposals** may be internal to a company in addressing a business situation, or they may come from a solicited or unsolicited sales situation. Formal proposals will include details of the proposed solutions and costs.
- **Feasibility reports** are a specific type of analytical report. When an entrepreneur or business manager has a new idea, it is prudent to fully explore the idea before making major investments. Some think of this report as a precursor to developing a full business plan. While a business plan may take many months to develop, a feasibility report can be developed in much less time, and it still provides excellent direction for decision makers.
- **Business plans** are typically informational reports about what a new or existing company plans to do over the next period of time. A business plan may take on a bit more of an analytical tone rather than a strictly informational tone when it is shared with potential investors. In some cases, the business plan may be presented with a request for funds; in those cases, the writing is gently more persuasive.
- **Other complex recommendations** may also come in the form of a formal report. These recommendations result from a business problem that an individual or team has been asked to solve.

Sharing Formal Reports

Formal reports may have internal or external audiences. Formal reports will be significantly larger than informal reports, and they often include a complex number of references and appendices (in the Back Matter area of the report).

The format of a report aligns to the recipient’s needs. Formal reports may be delivered in a variety of formats: documents, letters, digital postings to a website, and so forth. The reader’s comprehension is of utmost importance in selecting the delivery method. No user wants to receive an email and then tie up the office printer with a 40-page report. Avoid letting the delivery method hold back the meaning of the report.

Memos are less likely to be used for formal reports, since memos are typically used for short messages, and formal reports are generally lengthy. Letters are for external use, and again perhaps less likely to be used for a document of this type. However, a letter or an email may be used to introduce an accompanying report. Web postings are generally external in nature, but companies may have private networks for internal use. Depending upon the organization, this may be a suitable transmittal method. Remember, just as with informal reports, your delivery method should not change the content or structure of your formal report.

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