

4.8.17: How to Write an Informal Report

Learning Objectives

- Discuss how to write an informal report

Writing informal reports follows the same steps of any other writing task. First is the plan. Second is the writing. Third is the revising.

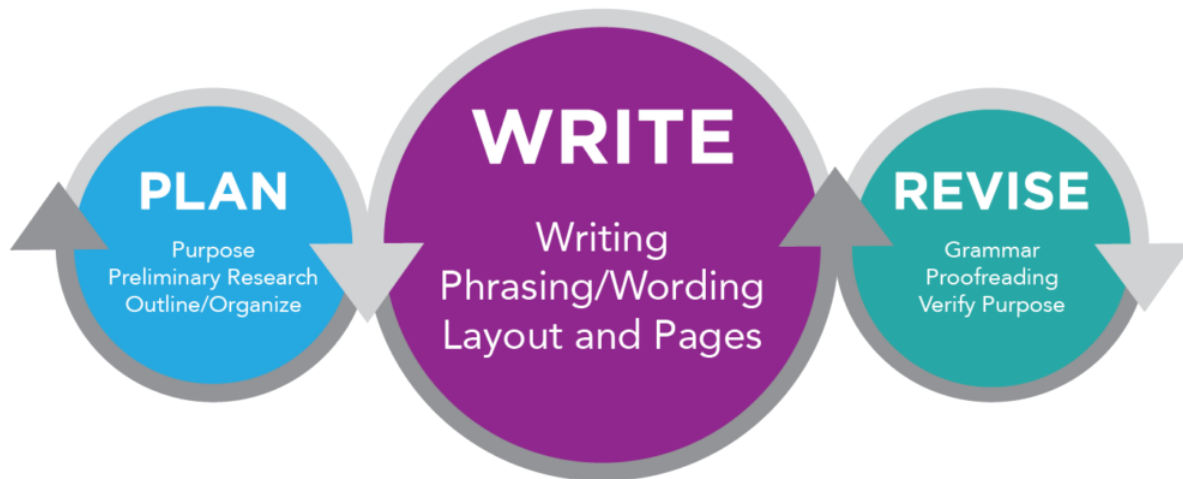


Figure 1.

Planning Your Informal Report

When asked to create an informal report, first check to see if your organization has a form or template that should be used. Then verify your understanding of the report's purpose.

For example, say you are a shift manager at a grocery store, and there has been an increase in customer complaints about fruit that seems to spoil more quickly than it used to. Your store manager has asked you to create a report on this issue. You need to determine whether your manager wants to know causes of fruit spoilage (including items such as time each type of fruit stays fresh from date picked, types of shipping containers, or temperature of storage units), or if your manager wants to know what is happening in the store after the fruit is received (how the fruit is handled, how much fruit can sit on top of other fruit, or temperature in the various storage units). The purpose of a report will impact the amount and type of research to be done.

Next you'll complete any data gathering needed; by the end of the project, you should have more data and knowledge than you started with (and possibly more than you need for the report itself). You'll use that data to create the report's outline. Writers must take care to provide only what is needed for the purpose of the report: avoid wandering to interesting side issues or presenting everything you learned whether or not it's relevant.

In the process of writing a report, or almost any business writing, the planning step should take at minimum 25–30 percent of the time or effort of the full report.

Writing Your Informal Report

With the detailed outline created in the planning process, the actual writing of the informal report should go quickly. In this step, you'll focus on paragraph structure, wording, and phrasing using the lessons found in Module 2: Writing In Business.

Sometimes, writers hear the term "report" and think their writing style must change. What works well for short messages also works well for informal reports. The primary difference is that a report requires a bit more depth to appropriately communicate its message: there are more words and paragraphs, but the words do not need to be longer or more complex sounding. Write with the same skills taught in Module 2: Writing In Business.

? Writing for Your Company

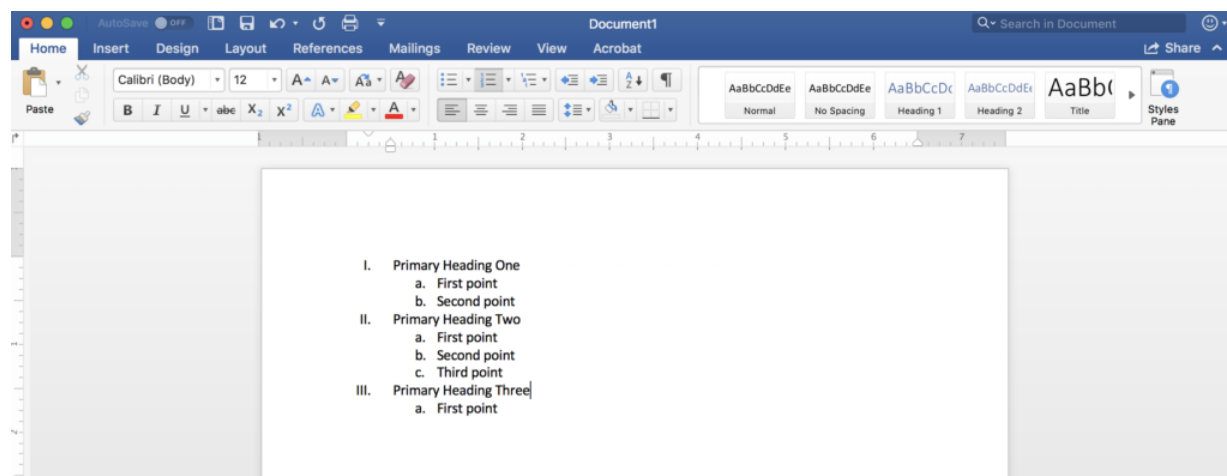
Different companies have different styles for writing reports: you should always match the style of your current institution. Some companies accept a more casual style of writing. This may include the use of personal pronouns such as “I recommend . . .” or “we completed a survey of 20 people.” Some companies accept use of contractions as in, “The Customer Contact team couldn’t reach a conclusion on types of bags to use,” while others do not.

In all cases, remember that a report may be retained for a long time and may be viewed by many readers. With your current credibility and future credibility possibly at stake, it is generally better to be safe by using slightly more professional tone.

Formatting Your Report

In writing your report, remember that headings guide the reader, but like an email subject line, they are no substitute for clear, descriptive writing that helps the reader stay on track. While writing your report, you should use summary statements as each paragraph or section closes to avoid a jerky, disconnected feel in your writing. Ensure that each new section below a header has a good topic sentence that serves as an introduction to the section.

When writing your report, you can take your preexisting outline (from the planning step) and use your word processor’s preformatted heading styles to create the headings for your report. This provides two benefits: it quickly organizes your report in a pleasing way, and it meets ADA (Americans with Disabilities Act) requirements.



When writing a report, writers often tend to add sections simply because they are “supposed to be there,” rather than focusing on the purpose of each section and how it might support the report.

A stronger writing skill is to look to the type of report and the outline prepared for the writing, then select headers that suit the content, rather than content suiting the header. With informal reports, the style is somewhat relaxed, so headers should focus on making information easy for the reader to access.

When writing a report, or in almost any business writing, the writing step takes about 40–50 percent of the total time or effort for the full report. This may surprise many writers who think that this step is all you need to complete for a report. However, if you spend the time to ensure the planning step is well done, writing goes much more quickly, and you’ll produce a better report.

Revising Your Informal Report

As with most documents, the final step in creating a report is the one most frequently skipped or only partially completed by writers; in fact, writers will often intentionally skip this step, likely because it is at the end of a long process, and they are often eager to submit their work to the requester.

Additionally, their familiarity with the content can lead to them seeing what was intended versus what is actually written. For example, the sentence, “In summary, the store should **now** implement the new plan” can accidentally be typed, “In summary, the store should **not** implement the new plan” to disastrous results. To combat this, you can use word processing proofreading tools, which will catch some spelling errors. Then, no matter how long it takes, read the report aloud. A team member or peer is an excellent additional reviewing tool.

Another way to fail on this step is to read only for proofreading and grammar mistakes. However, revising should also include going back to the original request for the report and back to the original outline to see if the report is directly focused on the planned purpose. Along the way of data gathering and finding new ideas on a topic, there can be some unintentional shift in the focus of the writing. Look to ensure that just the information needed to address the topic is present. Ensure that the primary purpose comes across clearly in your writing.

In the process of writing a report, or almost any business writing, the revising step takes about 25–30 percent of the total time or effort of the full report.

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