



## Short Reports

- A **short report**, also known as an informal or semiformal report, is an organized presentation of relevant data on any topic. It may indicate that:
  1. Work is being completed
  2. Schedules are being met
  3. Costs have been contained
  4. Sales projections are being met
  5. Unexpected problems have been solved

Copyright © Cengage Learning. All rights reserved. 8 | 2

## Types of Short Reports

- The six most common types of short reports are:
  - **Periodic reports.** Provide readers with information at regularly scheduled intervals.
  - **Sales reports.** Provide businesses with financial and managerial information.
  - **Progress reports.** Inform readers about the status of ongoing projects.
  - **Trip/travel reports.** Document business trips and how they affect ongoing or future business.
  - **Test reports.** Record the results of tests.
  - **Incident reports.** Outline unexpected events that interfere or threaten normal, safe business operations.

Copyright © Cengage Learning. All rights reserved. 8 | 3

## Guidelines for Writing Short Reports

- The following guidelines will help you write any short report successfully:
  - Do the necessary research. Take careful notes, record all necessary background information, collect relevant factual data, and interview key individuals.
  - Anticipate how the audience will use your report. Consider how much your audience knows about your project and what types of information they most need.
  - Be objective and ethical. Avoid guesswork, do not substitute impressions or unsupported personal opinions for careful research, avoid biased/skewed/incomplete data, and double check all facts/figures/specifications.

Copyright © Cengage Learning. All rights reserved. 8 | 4

## Guidelines for Writing Short Reports (continued)

1. Organize carefully. Include a purpose statement, findings, a conclusion, and recommendations.
2. Write clearly and concisely. Use an informative title/subject that gets to the point right away, write in plain English, use international English, adopt a professional yet personal tone, and do not include unnecessary background information.
3. Use appropriate format and visuals. Make your report look professional, readable, and easy to follow; help readers locate and digest information quickly; be consistent in your design and format; include only the most essential visuals; and design, import, and place visuals appropriately.

Copyright © Cengage Learning. All rights reserved. 8 | 5

## Periodic Reports and Sales Reports

- Depending on needs, **periodic reports** may be daily, weekly, bimonthly, monthly, or quarterly. They help a company or agency keep track of the quantity and quality of the services it provides and the amount and types of work done by employees.
- **Sales reports** fulfill two functions: financial and managerial. As financial records, they list costs per unit, discounts or special reductions, and subtotals and totals. As managerial tools, they help businesses make both short- and long-range plans.

Copyright © Cengage Learning. All rights reserved. 8 | 6

## Progress Reports

- **Progress reports** are intended for people who are not working alongside you but need to know your activities. They consist of three parts:
- **Introduction.** Indicate why you are writing the report, provide any necessary project titles and codes with dates, and help readers recall the job you are doing for them.
- **Body.** Provide significant details about costs, materials, personnel, and times for the major stages of the project.
- **Conclusion.** Give a timetable for the completion of duties or submission of the next progress report.

## Trip/Travel Reports

- **Travel/trip reports** may be field trip reports, site inspection reports, or home health or social work visits. Writing the travel/trip report will be easier and your report will be better if:
  - Before you leave, you obtain contact information, do background research, gather necessary documents, bring essential supplies, locate a map/get directions, organize appointments, and if necessary get permissions.
  - During your trip, you meet all contact people, collect important documents, and pay attention to matters you could not have observed beforehand.
  - When you return, you write the report promptly, detail where you stayed/how long, exclude irrelevant details, and double check names and figures.

## Test Reports

- Readers will expect **test reports** to be both objective and accurate. They want evidence, not feelings, and they want precise measurements. In addition, test reports must supply the following information:
  - Why you performed the test. An explanation of the reasons, your goals, and who may have authorized you to perform the test.
  - How you performed the test. Under what circumstances and controls you conducted the test; what procedures and equipment you used.
  - What the outcomes were. Your conclusions.
  - What implications or recommendations follow from your test. What you learned, discovered, confirmed, or even disproved or rejected.

## Incident Reports

- **Incident reports** must contain identification details, the type of incident, the time and location of the incident, a description of what happened, an indication of what was done after the incident, an explanation of what caused the incident, and recommendations.
- Because incident reports may be used as official legal records:
  - Submit your report promptly
  - Interview eyewitnesses.
  - Be accurate, objective, and complete.
  - Give facts, not opinions.
  - Do not exceed your professional responsibilities.