LESSON 18

BUSINESS REPORTS

Outline:

Formal Report and its parts

Formal Report

Parts of a Formal Report

A formal report’s format and impersonal tone convey an impression of professionalism. A formal report can be either short (fewer than 10 pages) or long (10 pages or more). It is informational or analytical, direct or indirect. It may be targeted to readers inside or outside the organization.

There are three basic divisions of a formal report:

1. Prefatory Parts

2. Text Parts

3. Supplementary Parts

1. Prefatory Parts are:

a) Cover

b) Title fly

c) Letter of authorization

d) Letter of acceptance

e) Letter of transmittal

f) Table of contents

g) List of illustrations

h) Synopsis or executive summary

2. Text Parts:

a) Introduction

b) Body

c) Summary

d) Conclusions

e) Recommendations

f) Notes

3. Supplementary Parts:

a) Appendixes

b) Bibliography

c) Index

Prefatory Parts

Cover

Use a cover only for long reports. Use a sturdy, plain, light cardboard with good page fasteners. With the cover on, the open pages should remain flat. Center the report title and your name three to four inches from the upper edge.

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Title Fly

It is a plain sheet of paper with the title of the report on it.

Title Page

1. The title of the report

2. The name, title and address of the person group etc. that authorized the report

prepared for submitted to

3. The name, title and address of the person, group etc. that prepared the report,

prepared by, submitted by

4. The date on which the report was submitted.

The title page signals the readers by giving the report title, author’s name, name of person or organization to which the report is addressed, and date of submission. Choose title information but not long, A Report of, A Study of, or A Survey of etc.

Your title promises what your report will deliver by stating the report’s purpose and content. A title in order to be effective must be clear, accurate, comprehensive, specific, concise and appropriately.

Place of Title Page Items

Do not number your title page, but count it as page (I) of your prefatory pages. Centre the title horizontally on the page, three to four inches below the upper edge, using all capital letters. If the title is longer than six or eight words, centre it on two or more lines.

Letter of Authorization and Letter of Acceptance

If you receive written authorization (a letter or memo) you may want to include. It usually has direct request plan. Letter of Acceptance (or memo of acceptance) acknowledges the assignment. It follows good- news plan confirming time and money restriction and other pertinent detail. This letter is rarely included in report.

Letter of Transmittal (or Memo of Transmittal)

It conveys your report to the audience. It says what you’d say if you were handing the report to the person who authorized you. It has less formal tone.

Depending on the situation, your letter might:

• Acknowledge those who helped with the report

• Refer readers to sections of special interest

• Discuss the need and approaches for follow-up investigations

• Suggest some special uses of the information

• Urge the reader to take immediate action

• Use good news plan

Table of Contents

This table outlines the text and list Prefatory Parts

1. List preliminary items (transmittal letter, abstract) in your table of contents, numbering
the pages with small roman numerals. Make a list of items that appear at the end of the
report; glossary, appendix, notes and bibliography section. Number these pages with
Arabic numerals, continuing the page sequence of the report. List the first page of your
report text.

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2. Include no heading in the table of contents not listed as headings or subheadings in the report. Your report text may, however, contain certain sub-headings.

3. Use different types of styles and indentations to show the various levels of heads.

List of Illustrations

For simplicity sake, some reports prefer to include all visual aids as illustration or
exhibits.

Put the list of figures and table on separate page if they won’t fit on one page with the table of content.

Synopsis or Executive Summary

A synopsis is a brief overview (one page or less) of report’s most important point. It is also called abstract. Executive summary is a fully developed mini version of the report and is comprehensive.

1. Make your summary able to stand alone in meaning - a mini-report

2. Make it intelligible to the general reader. Readers of summaries will vary widely in expertise, perhaps much more than those who read the report itself. So translate all technical data into plain English.

3. Add no new information. Simply summarize the report.

4. Stick to the order of your report.

5. Emphasize only major points.

Text of the Report

Introduction

It has a number of functions, covers a wide variety of topics and helps the reader to follow and understand information.

Body

The section contains information that supports conclusion and recommendation as well as analysis, logic, interpretation of the information.

Closing

You summarize the main idea of your report highlighting your conclusion or recommendation and list any course of action. In long report, this section may be labeled Summary, Conclusion & Recommendation.

Supplementary Parts

Appendix/Appendixes

They contain materials related to the report but not included in the text because they were lengthy or not directly relevant. They include:

1. Statistics or measurements

2. Maps

3. Complex formulas

4. Long quotations

5. Photographs

6. Related correspondence (letters of inquiry etc.)

7. Texts of laws, regulations etc.

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Bibliography

A bibliography is a list of source materials on a particular subject. In a formal report it
shows what books and other library materials were consulted and it includes all the works
mentioned in the footnotes. As part of the reference matter, it follows the appendix or
appendices.

Index

An index is an alphabetical list of names, places and subjects mentioned in the report,
along with the page on which they occur. They are rarely included in unpublished reports.

RESTLESSNESS AMONG WORKERS

Prepared for

Ahmad Hassan

General Manager

ABC TEXTILE Mills

Prepared by

Asad Ali

Manager Cost Accounting Services ABC Textile Mills Ltd

March 6, 2006

Contents

1. Letter of Transmittal

2. Introduction

3. Present Situation

4. Effect on Business
 a)

b)

5. Causes of Restlessness
 a)

b)

6. Recommendation
 a)

b)

7. Conclusion

Letter of Transmittal

ABC Textile Mills Ltd
Raiwand Road Lahore

September 16, 2006

Managing Director

ABC Textile Mills Ltd.
Raiwand Road, Lahore

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Dear Sir,

Subject: Report on Restlessness among Workers

This is in reference to your letter no. 11 of September 3 in which I was asked to compile
a report on the restlessness now prevalent among our workers. I have completed my
investigations, and my findings with recommendations are given in a detailed report
which is enclosed.

I would be obliged if I could have your comments after you have gone through the report. If, in the course of your reading, you would like to discuss some points with me, I shall be happy to do so at any time convenient to you.

Respectfully submitted

Yours truly,

Asad Ali

Manager Cost Accounting Services

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