LESSON 17

BUSINESS REPORTS

Outline:

Format

Some Common Errors to Avoid

o Lack of Objectivity

o Hasty Generalization

o Hidden Assumptions

o Either or Scenarios

o False Causal Relationships

o Begged Questions

o Personal Attacks or Appeals to Popular Prejudice

Main Features of the Report

The Opening

Headings and Lists

Previews and Reviews The Ending

Organizational Plan for Short Informal Reports Model Business Reports

Letters Reports

Letter reports are of two types:

1. Informational letter reports

2. Analytical letter reports

1. Informational letter reports include

• A staff report to financial officer regarding issues concerning personnel turnover in the
 sales department

• A report in reply to inquiry about product and services provided by your Company

2. Analytical Letter Reports

These include investigation of an issue or problem

• Calculation of financial ratios of a company in order to control its financial condition.
Format

A letter report is simply a report in letter form; it is often used when sending information to a reader outside your organization. It includes:

1. Date

2. Inside address

3. Salutation

4. Body (the heart of the report)

5. Complimentary close

6. Signature

7. Reference section

Often the letter report has a subject line, usually placed a line or two below the salutation. Its
length may range from two to five (seldom more) pages. And it may have two purposes:
informational or analytical. For your report to be effective, it must be logical. If you learn how to
think logically, you’ll also write more logically. Here are some common errors to avoid.

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1. Lack of Objectivity

Seeing only the facts that support your views and ignoring any contradictory information.

For example,” Although half the survey population expressed dissatisfaction with our current product, a sizable portion finds it satisfactory.” (You may be tempted to ignore the dissatisfied half instead of investigating the reasons for their dissatisfaction.)

2. Hasty Generalization

Forming judgments on the basis of insufficient evidence or special cases, for example:

“Marketing strategy Z increased sales 15 percent in Lahore supermarkets. Let’s try it in Karachi.” (Lahore and Karachi are probably vastly different markets).

3. Hidden Assumptions

Hiding a questionable major premise: for example,

“We are marketing product X in Print media because we marketed product Y in Print media.” (Who says product X and product Y should be marketed the same way?)

4. Either or Scenarios

Setting up two alternatives and not allowing for others: for example,

“We must open a new plant by spring, or we will go bankrupt.” (Surely there are other ways to avoid bankruptcy).

5. False Causal Relationships.

Assuming that event A caused event B merely because A preceded B: for example,

“Sales increased 20 percent as soon as we hired the new sales director.” (Something besides the new sales director might have been responsible for increased sales).

6. Begged Questions.

Assuming as proven what you are seeking to prove: for example,

“We need a standard procedure so that we will have standard results.’ (But why is standardization important?)

7. Personal Attacks or Appeals to Popular Prejudice.

Thinking people or ideas you don’t like by chaining them to irrelevant but unpopular actions or ideas: for example,

“Mr. Naeem mishandled the budget last years, so he can’t be expected to motivate his staff.” (Mr.
Naeem's accounting ability may have nothing to do with his ability to motivate staff members).

Main Features of the Report

Following are main features of the report.

The Opening

As the name suggests, the opening is the first section in any report. A good opening accomplishes at least the following three things:

i) Introduces the subject of the report

ii) Indicates why the subject is important

iii) Previews the main ideas and the order in which they will be covered.

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If you fail to provide readers with these clues to the structure of your report, they’ll read aimlessly
and miss important points; much like drivers trying to find their way through a strange city
without a map.

Headings and Lists

A heading is a brief title at the start of a subdivision within a report that cues readers about the
content of the section that follows. Headings are useful markers for clarifying the framework of a
report. They visually indicate shifts from one idea to the next and when subheadings (lower level
headings) and headings are both used, they help readers see the relationship between subordinate
and main ideas. In addition, busy readers can quickly understand the gist of a document simply by
scanning the headings.

Headings within a given section that are of the same level of importance should be phrased in parallel form. In other words, if one heading begins with a verb, all same-level headings in that section should begin with verbs. If one is a noun phrase, all should be noun phrases. Putting comparable ideas in similar terms tell readers that the ideas are related. The only exception might be such descriptive headings as “Introduction” at the beginning of a report and “Conclusions” and “Recommendations” at the end. Many companies specify a format for headings.

A list is a series of words, names, or items arranged in a specific order. Setting off important ideas in a list provides an additional structural clue. Lists can show the sequence of ideas or visually heighten their impact. In addition, they facilitate the skimming process for busy readers. Like headings, list items should be phrased in parallel form. You might also consider multilevel lists, with subentries below each major item (much like an outline).

Previews and Reviews

You may have heard the old saying “tell’em what you’re going to tell’em; then tell ‘em what you just told’em.” The more formal way of giving this advice is to tell you to use preview sections before and review sections after important material in your report. Using preview section to introduce a topic helps readers get ready for new information. Previews are particularly helpful when the information is complex or unexpected. You don’t want the reader to get halfway into a section before figuring out what it’s all about.

Review sections, obviously enough, come after a body of material and summarize the information for your readers. Summaries that come at the end of chapters in some textbooks are review sections. Long reports and reports dealing with complex subjects can often benefit from multiple review sections, and not just a single review at the very end.

The Ending

Research shows that the ending, the final section of a report, leaves strong and lasting impression.
That’s why it’s important to use the ending to emphasize the main points of your message. In a
report written in direct order you may want to remind readers of your key points or your
conclusions and recommendations. If your report is written in direct order, end with conclusions
and recommendations. If your report is written in indirect order, end with a summary of key
points (except in short memos). In analytical reports, end with conclusions and recommendations
as well as key points. Be sure to summarize the benefits to the reader in any report that suggests a
change of course or some other action. In general, the ending ties up all the pieces and reminds
readers how those pieces fit together. It provides a final opportunity to emphasize the wholeness
of your message. Furthermore, it gives you one last chance to check what you really wanted to
say.

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Organizational Plan for Short Informal Reports

A. Format

1. For brief external reports, use letter format including a title or a subject line after the
 reader’s address that clearly states the subject of the document.

2. For brief internal reports, use memo or manuscript format.

3. Present all short informal reports properly.

a. Single-space the text.

b. Double-space between paragraphs.

c. Use headings where helpful, but try not to use more than three levels of

headings.

d. Call attention to significant information by setting it off visually with lists or indention.

e. Include visual aids to emphasize and clarify the text.

Organizational Plan for Short Informal Reports

B. Opening

1. For short, routine memos use the subject line of the memo form and the first sentence or
 two of the text as the introduction.

2. For all other short reports, cover these topics in the introduction: purpose, scope,
 background, restrictions (in conducting the study), sources of information and methods of

research, and organization of the report.

3. If using direct order, place conclusions and recommendations in the opening.

C. Body (Findings and Supporting Details)

1. Use direct order for informational reports to receptive readers, developing idea around

subtopics (chronologically, geographically and categorically).

2. Use direct order for analytical reports to receptive readers, developing points around

conclusions or recommendations.

3. Use indirect order for analytical reports to skeptical or hostile readers, developing points

around logical arguments.

4. Use an appropriate writing style.

a. Use an informal style (I and you) for letter and memo reports, unless company

custom calls for the impersonal third person.

b. Use an impersonal style for more formal short reports.

5. Maintain a consistent time frame by writing in either the present or the past tense, using

other tenses only to indicate prior or future events.

6. Give each paragraph a topic sentence.

7. Link paragraphs by using transitional words and phrases.

8. Strive for readability by using short sentences, concrete words, and terminology that is

appropriate for your readers.

9. Be accurate, though, and impartial in presenting the material.

10. Avoid including irrelevant and unnecessary details.

11. Include documentation for all material quoted or paraphrased from secondary sources,
 using a consistent format for all quoted and paraphrased documents.

D. Ending

1. In informational reports summarize major findings at the end, if you wish.

2. Summarize points in the same order in which they appear in the text.

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3. In analytical reports using indirect order, list conclusions and recommendations at the
 end.

4. Be certain that conclusions and recommendations follow logically from facts presented in
 the text.

5. Consider using a list format for emphasis.

6. Avoid introducing new material in the summary, conclusions, or recommendations.

Model Business Reports

Report on the Low Admission Rate in a Newly Opened Branch of a School

October 10, 2006

The Principal,

The School, Main Branch,
Lahore.

Dear Madam,

Subject: Causes of Low Admission Rate

This report is in response to your directive No. 123 September 20 which demands certain reasons of very poor admission rate in this branch. My findings are given below:

I. The location of our school building is not ideal.

II. The building itself is very old.

III. It does not appeal the visitors.

IV. We had been facing the problem of permanent faculty because direct conveyance is yet

not available.

V. Parents lodged several complaints against the management, but we could not help it.

Considering these problems, I propose that:

1. The building of the school should be shifted to a main road.

2. Permanent faculty should be appointed.

Yours sincerely,

A Report on Slow Sales and Rising Complaints

TO: Rana Abid, Vice President of Marketing

FROM: Bashir Ahmad, National Sales Manager

DATE: September 12, 2006

SUBJECT: Major accounts sales problems

INTRODUCTION

This report outlines the results of my investigation into the recent slowdown in sales and the
accompanying rise in sales-and service-related complaints from some of our largest customers.

As we discussed at last quarter’s management meeting, major account sales dropped 12 percent over the last four quarters, whereas overall sales went up 7 percent. During the same time, we have noticed an increase in both formal and informal complaints from larger customers regarding how confusing and complicated it has become to do business with us.

My investigation started with in-depth discussions with the four regional sales managers, first as a
group and then individually. The tension felt in the initial meeting eventually bubbled to the
surface during my meetings with each manager. Staff members in each region are convinced that

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other regions are booking orders they don’t deserve, with one region doing all the legal work only
to see another region get credited with the sale and, naturally, the commission and quota credit.

I followed up the sales manager’s discussions with informal talks and e-mail exchanges with several sales reps from each region. Virtually everyone who is involved with our major national accounts has a story to share. No one is happy with the situation and I sense that some reps are walking away from major customers because the process is so frustrating.

Organizational Issues

When we divided the national sales force into four geographical regions last year, the idea was to focus our sales efforts and clarify responsibilities for each prospective and current customer. The regional managers have got to know their market territories very well, and sales have increased beyond even our most optimistic projections.

Unfortunately, while solving one problem, we seem to have created another. In the past 12 to 18
months, several regional customers have grown to national statuses. In addition, a few national
retailers have taken on (or expressed interest in) our products. As a result, a significant portion of
both our current sales and our future opportunities lie with these large national accounts.
I uncovered more than a dozen cases in which sales reps from two or more regions found
themselves competing with each other by pursuing the same customer from different locations.

Moreover, the complaints from our major accounts about overlapping or nonexistent account coverage are a direct result of the regional organization.

Recommendations

In the light of the above findings I recommend:

(i) Areas may be reallocated.

(ii) A coordination cell may be set up in the head office to monitor the working of these

regional offices.

(iii) A bulletin giving area wise sales achievements of every region may be circulated.

If there is anything else you would like to know, please call me.

Yours truly,

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