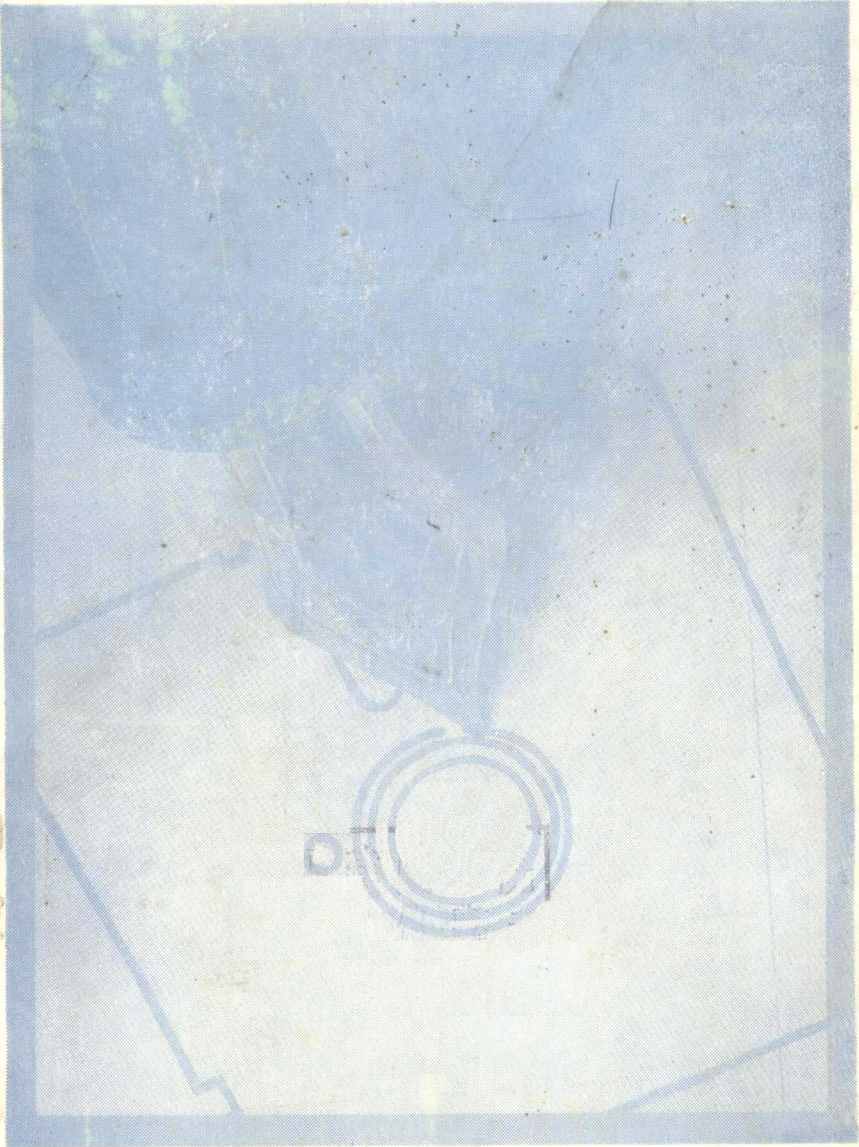


Second Edition

*Guidelines for
Report Writing*



Ron S. Blicq

Second Edition

Guidelines for Report Writing

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Preface

These guidelines are intended to be used as an easy-to-consult reference handbook. They have been prepared for and tested by a wide spectrum of report writers in various disciplines, ranging from business administrators and office managers to technicians, engineers, and scientists. The tailor-made writing plans have helped their users not only to write better-organized reports, but also to write them more easily and more rapidly.

The writing plans cover the three general categories of reports written in business, government, and industry. Short reports include informal incident, field trip, job progress, and inspection reports; semiformal reports comprise laboratory reports and medium-length investigation and evaluation reports; and formal reports cover analytical and feasibility studies, as well as major investigations. The text also includes writing plans for three types of proposals, from single-page suggestions to full-length formal presentations.

All of the writing plans are based on a unique modular method of report organization, called **The Pyramid Method**, which can help report writers identify the most important information they have to convey and focus their readers' attention on it. The pyramid method then groups the remaining information into compartments which develop the report writer's case logically and coherently.

For each type of report described in the handbook, the guidelines provide:

1. An individual writing plan.
2. Detailed instructions for using the writing plan.
3. A model report (in some cases there are two examples).
4. Comprehensive comments on how each writer has used the suggested writing plan to shape his or her report.

A writing techniques section at the rear of the handbook provides useful suggestions for "sprucing up" the appearance of reports and getting better mileage from a minimum number of words. It also shows how to construct a list of references or a bibliography; present numbers, abbreviations, and metric (SI) symbols; and prepare illustrations for the report narrative.

The penultimate chapter provides advice for report writers who key-stroke and edit their own reports at a computer terminal, and takes a brief look at the implications of desktop publishing.

The final chapter discusses the writer's role as part of a report production team, and offers guidelines for working smoothly with typists, illustrators, printers, and sometimes editors, all of whom may inject their expertise into the production of a report.

R.S.B.

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PART ONE

A Practical Approach to Report Writing

1 How to Use These Guidelines

2 The Report Writers' Pyramid

How to Use These Guidelines

There are two ways you can use these guidelines: you can read them right through from start to finish, or you can read only the parts that apply to the kind of report writing you do. As most readers will be busy people, I expect you are more likely to read selectively.

If you choose to dip into sections of the book, I recommend you follow this reading plan:

1. Turn to the Table of Contents.
2. Identify which report types listed in Parts 2, 3 and 4 (chapters 3 through 8) you write now, and place a check mark against their names. Also mark any report types you think you might have to write over the next 12 months.
3. Read chapter 2. Chapter 2 is particularly important because it describes the basic structure on which all the reports in chapters 3 through 8 are modelled.
4. Turn to each of the reports you have marked, and:
 - Read the introductory remarks and recommended writing plan.
 - Read the model report. You will find most model reports are printed on right-hand pages, and most comments on the reports are printed on the facing left-hand pages. I recommend you first read the model report right through once, and resist the temptation to glance across to the cross-referenced comments on the facing page(s). This will give you a better “feel” for the report.
 - Read the comments on the facing page(s) and cross-reference them to the report.

Note: For some reports you write, you will find an exact writing plan to use and a comparable model to follow in the guidelines. For others, you may have to search for a writing plan that approximates your needs, and then adapt it to fit your particular situation.

5. Read Part 5 (chapters 9 through 15). These chapters contain “how to” suggestions on report shape, appearance, language, and writing style, and so act as a reference section which you can consult at any time.
6. As a final step, turn to the reports you did not read during step 4 and:
 - Examine the writing plan for each.
 - Read the model report. (If the report writer’s rationale or writing method is not clear to you, also read the comments on the facing pages.)

The individual writing plans illustrated here have been tested and used thousands of times, and are known to work well. But bear in mind that they are only *suggestions* for organizing each report. They are not hard-and-fast rules, and you can alter them to suit both your needs and those of your audience — the person or people for whom you write each report.

The Report Writers' Pyramid

If I asked you to tell me what you find most difficult about report writing, would one of these answers be yours?—

“Getting started.”

“Organizing the information: arranging it in the proper order.”

“The writing: getting the right words down on paper the first time.”

You are in good company if your answer is similar to one of these. I can ask the same question of any group of business or technical report writers and always hear the same answers. And often those who say getting started also mention one of the other answers.

The ideas presented in this book will help remove some of the drudgery from report writing. They will show you how to get started, organize your thoughts, and write simply and easily. This chapter provides you with basic guidelines. Subsequent chapters demonstrate how you can apply the guidelines to various situations.

Getting Started

Dave Kowalchuk has spent two months examining his company's methods for ordering, receiving, storing, and issuing stock. He has found them to be inefficient, has investigated alternative methods, and has worked out a plan for a better system. Now he is ready to write a report describing his findings and suggestions.

But Dave is having trouble getting started. When he sits down to write, he just can't seem to find the right words. He writes a few sentences, and sometimes several paragraphs, yet each time sets them aside. He is frustrated because he feels unable to bring his message into focus.

Dave's problem is not unusual. It stems from a simple omission: he has neglected to give sufficient thought either to his reader or to the message

he has to convey. What he needs to do is make two critical decisions *before* he picks up his pen. He should ask himself two questions:

1. *Who is my reader?*
2. *What do I most want to tell that reader?*

Identifying the Reader

If you are writing a memo report to your manager, you will know immediately who you are writing to (although you may have to give some thought to other possible readers, if your manager is likely to circulate your memo). But if your report will have a wide readership—as Dave's may well have—then you must decide who is to be your primary reader, and write for that particular person. Trying to write for a broad range of readers can be as difficult as trying to write with no particular reader in mind. In both cases you will have no focal point for your message. And without a properly defined focal point your message may be fuzzy.

How can you identify the primary reader? It is the person (or people) who will probably use or act upon the information you provide. You need not know the person by name, although it is useful if you do because then you will have a precise focal point. But you should at least know the type of person who will use your information and be able to identify the position he or she holds.

Yet simply knowing your reader is not enough. You need to carry the identification process one step further by answering four more questions:

QUESTION 1: *What does the reader want, expect, or need to hear from me?*

You have to decide whether your reader will want a simple statement of facts or a detailed explanation of circumstances and events.

You also have to consider whether the reader needs to know how certain facts were derived.

QUESTION 2: *How much does the reader know already?*

The answer to this question will provide you with a starting point for your report, since there is no need to repeat information the reader already knows. (But note that your answer may be influenced by the answer to question 4.)

QUESTION 3: *What effect do I want my report to have on the reader?*

You have to decide whether the purpose of your report is to inform or to persuade. In an informative report you simply relate the

necessary facts, and then you stop. In a persuasive report you have to convince the reader to act or react, which can range from simply agreeing with a plan you propose, through ordering materials or equipment on your behalf, to authorizing a change in policies and procedures.

QUESTION 4: *Are other people likely to read my report?*

You have to consider the route your report takes before it reaches your reader, and to whom you may send copies. If the report will pass through other people's hands, then you must consider how much additional information you will have to insert to satisfy their curiosity. (At the same time you must not let your desire to satisfy additional readers deflect you from focusing on the primary reader's needs and expectations.)

In the situation described earlier, Dave Kowalchuk decides his primary reader is Maria Pavanno, who is Manager of Purchasing and Supply. He also recognizes that Maria may circulate his report to other managers, and particularly to the Vice President of the division.

Identifying the Message

Now that Dave has his primary and secondary readers clearly in mind, he has to make a second decision. This time he has to answer a single question:

What do I most want to tell my primary reader?

Dave must examine the results of his investigation and decide which results will be most useful to Maria Pavanno. His aim should be to find key information which will so spark Maria's interest that she will want to know more. For example, would she *most* want to know that:

1. The company's supply system is out-of-date and inefficient?
2. Other businesses Dave has investigated have better supply systems?
3. There are several ways the company's supply system can be improved?
4. Improvements to the company's supply system will increase efficiency?
5. Changes to the supply system will save time and money?

Although all these points are valid, Dave reasons that Maria will be most interested in knowing how to save the department time and money. As increased efficiency is the key to these savings, he decides to combine points 4 and 5 into a single message. So he writes

"Improvements to our supply system will increase efficiency and save time and money."

This becomes his *Main Message*—the information he most wants to convey to his reader, Maria Pavanno.

When you have identified both your primary reader and your main message, it helps to write them in bold letters on a separate sheet of paper and keep the sheet in front of you as you write. That way you have a constant reminder that you are writing for a particular person and have a specific purpose in mind.

Using the Pyramid Method

If you were to ask any group of managers what single piece of advice they would give new report writers, the two replies you would hear more than any others are:

"Tell me right away what I most need to know."

"Draw my attention to the results. Don't bury them so I have to hunt for them."

You can meet both of these requirements if you use the pyramid method to organize your reports. The pyramid method emphasizes the most important information by bringing it right up front, *where it will be seen*.

As its name implies, the pyramid method suggests that you organize your reports in pyramid form, as shown in Figure 2-1. The essential information (what the reader most needs to know) sits at the top of the pyramid, where it is supported by a strong base of facts and details.

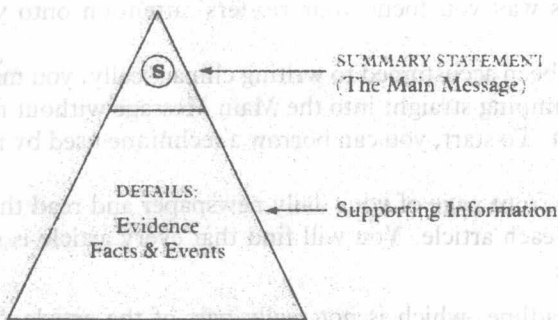


Fig. 2-1. The report writers' pyramid.