ENGLISH BUSINESS REPORT WRITING

英语商务报告写作

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常玉田 著

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英语商务报告写作

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前　言

“如果我们知道做什么，我们就做。如果不知道做什么好，我们就谈论一番。如果连讨论什么也不知道，我们就写一份报告。”

威廉·迪兰尼《**小型企业失败的原因**》

这段近乎调侃的议论，在笔者看来，至少可以说明撰写报告书这个行为的本身，的确可以帮助人们激发思维、理清思路、形成意见。

市场动态瞬息万变，商业活动头绪纷繁，经理们日理万机，处长们应酬不断，他们为了解决重大问题或者做出重大决策，必须占有大量的信息，掌握各方面的情况。种种商务报告便是服务于这个目的：向领导提供情报汇总和决策依据。董事会或者总经理决策是否正确，很大程度上取决于下属报告是否准确、及时、全面、翔实。

懂得如何撰写报告，便可以把你饭后睡前的零碎想法，物化为具体的行动方案；听了上司的信口开河，给他形成像模像样的规划纲要；开会时语焉不详的灵感思绪，可以落实为证明自己价值的书面材料；大家伙儿的七嘴八舌，你能体现为有理有据的完整表述。做个有心人，掌握好撰写报告这个商界必备的工具，你能时不时地让上司的眼睛为之一亮，叫同事们心服口服，而且注定可以留下长久而深刻的好印象。

报告确实重要。文牍主义也好，官僚主义也罢，从小职员提个建议到联合国无休止的大会，从公司上市之前到个人出差回来，从要求添台打印机到向世界银行申请贷款修建一条铁路，各种各样的报告书始终都是其中的核心，它是让层层关节活动起来的接力棒，它是叫从科长到总理这一整套国家机器因你而运转的发令枪。

撰写各类报告是商业活动中的基本工作内容之一，是成为高级白领的一项必备技能。领导或经理可以不写报告，但是若想日后当个领导经理，那就必须知道怎么起草报告；若要仕途顺利，显得你成果多多，那就必须明白迅速形成一份报告的常规技巧。

英语的 reports，无论其内涵还是外延都比汉语的“报告”要大得多。英语报告在商务运行中的应用十分普遍，涉及内容之广泛，可从以下这些名称中体现出来：项目建议书、立项报告、策划书、项目进展报告、实验报告、考察报告、投资收益报告书、人事调度报告、生产进度报告、销售业务报告、商务调查报告、营销计划书、可行性研究报告、事故调查报告、产品分析、市场调查报告、市场分析报告、专题调研、企业年度报告书、年度总结、通告、信息汇总、情报分析等。

这类文本的共同特点是**篇幅可长可短，体例必须规范；内容或繁或简，格式非常关键；题目有大有小，成败全看语言**。它们的目标读者应当是使用英语作为工作语言的老板级人物及企业运营所涉及的上下游相关业务部门的决策层，它们的内容则多是有关经贸业界的某一方面，可以是理论课题，也可以是实务个案。

从社会生活的实际情况看，英语写作技巧是中国现阶段白领阶层的薄弱环节，但是学好了却可成为他们职业生涯中引起注意、获得晋升、得以重用的主要手段。本课程旨在帮助你更好地利用书面形式去表现你的业务能力。

本书的读者应当是有一定英语基础、在合资企业、外企、国家机关等单位工作、能熟练运用或需要使用 Word 或 WPS 处理业务、已在使用、需要使用、或希望使用英语撰写各式常见报告的各种专业人士和其它自愿选修者。

本书旨在全面介绍英语报告的种类、特征、结构、目标读者及其应对方式、撰写步骤、面谈技巧、问卷的设计、第一手资料的收集、二手资料的筛选、信息归类和分析、格式要求、图表制作、报告篇幅的充实和压缩、观点的组织、英语文字的修改和润饰等。同时，这是一门操作性、实践性很强的课程，学习之后应当成为你业务能力的重要构成部分。

《英语报告写作》(Reports Writing)，是《高级商务英语写作》(Business Writing 610 — 690)系列课程中的核心内容之一。

本书在笔者的教案基础上写成。本课程从一开始便采用英语授课，讲授的核心内容是使用英语来撰写目标读者为读、写英语的人士的商务报告，故此本书的主要论述及其案例采用英语。

应出版社的要求，为了忙碌的你迅速掌握要点，在付梓之前为各章增加了汉语说明和提要。这部分内容与文内的英语叙述互为补充，并不是章节内容的简单翻译。

本书的切入点和讲授重点均在“**尽可能达意地使用英语来阐述汉语环境下的业务内容**”，也可以说是“**在英语环境中讲述中国的事情**”。

同时，论述和案例中不时涉及到经贸类企业的一部分业务流程，但并未试图

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替代任何实务课程。因此读者如具备相应的业务常识和操作体验，则效果会更好一些。

这本书分为十五章，划成四个模块。一至四章介绍了英语报告的特征、结构、常见样式、多种报告的样本、目标读者及其应对。五至八章是第二个模块，围绕撰写报告本身之前的准备、素材收集提出一些基本的原则和方法。九至十二章针对正式报告正文的四个部分展开讨论。本书的第四个模块包括十三至十五章，主要讨论形成一篇体例完备之报告的种种技术性手段及其应用。

本书可作为采用英语撰写商务报告的教科书，也可供自学之用。第四章至第十四章后面附有练习，部分有参考答案，供你学习中热身。

本书除了少部分例句和部分样本为引用之外(具体出处请见引用部分后面的注脚和书末所列文献)，绝大部分的论述均为笔者参考书末所附书目，结合为公司所做实例和学生作业，在教学中不断总结而重新撰写的，未经他人审阅。书中的论述和例子，始终围绕“中国人用英语写商务报告”这个命题展开，显著区别于坊间同类。本着文责自负的原则，特此说明。

本书中的部分案例和作为“not good”例子的引文，其原始版本系对外经济贸易大学英语学院部分研究生的课程作业，本书引用时作了相应的改动，大部分改动还相当的彻底。但是作者很高兴借此一角向这些同学鸣谢。

从一份反复修改的教案，到这本制作良好的书，不敢忘记外文出版社的李毅先生。没有他的耐心与细致，没有他的劝说和奔波，可能不会有这本书。

常玉田
2001 年 8 月
于对外经济贸易大学

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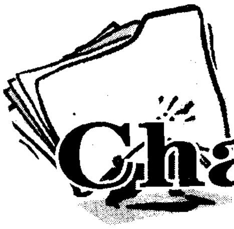


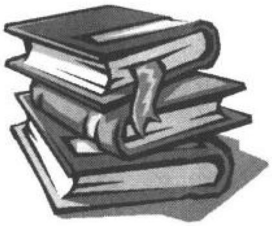
Chapter 1

REPORT AND REPORT TYPES

Objectives

After studying this chapter, you should know:

What a business report is or should be
Types and uses of business reports
How to stay consistent in type and style
Benefits of learning how to write reports



英语的 reports 无论其内涵还是外延都比汉语的“报告”或“报告书”要大得多。在国外有些课程设置和公司文书工作中，请事假和要求修理电脑这类便条，会议、学术讲座这类通知，公函、会议纪录、内部备忘录这些文件，求职信、调动申请书等都当作 reports。在一些地方人们还把手册、目录、通讯、提要、软件使用说明、培训教材等也归入 reports 的项目之下。这些文书不在本书的议论范围之内。

许多以数据为主的填表式文件，许多有抬头、有落款、以信函形式呈报的公文，其实质内容却是报告中的一类，例如预算报告、财务报表、损益表，有些议定书、商品（品质、重量等）检验、卫生检验、动物或植物检疫证书、银行保函、履约保函、资格声明书、财务审计报告、招标、投标书等。这类报告往往遵循着固定的套话和格式，需要的创造性写作内容其实不多，本书也不多作论述。

通常而言，“报告”一类公文包括企业年度报告书、项目进展报告、考察报告、可行性研究报告、问题/事故调查报告、产品分析、专题调研、营销计划、年度总结等。虽说遵循着相对固定的格式，但是题材多样化、事情规模有大小、完成情况可变因素多、陈述语言创造余地宽广，其内容往往需要报告作者根据具体情况从头撰写，所谓格式只是一个框架而已。本书主要介绍的是这一类的报告。

本书第一至第四章构成一个模块，尽可能全面地介绍了英语报告的特征、结构、常见样式、多种报告的样本、目标读者及其应对方式。这个模块的目标是扫清外围、廓清主题，明确客户、指明方向。

本章主要就“什么是报告”、“报告的种类”、“形式服从于内容”、“学会撰写报告有什么功利性目的”等四方面作一个概括的介绍。

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1.1 Definitions of the Report

A report is a formal or even official document that investigates, selects and interprets information by using appropriate techniques for a stated purpose. Usually a report is required by a company or organization on a definite topic. It may be a simple record of events, or it can be a long text discussing in detail a certain project of national importance. A report may be written to describe a situation that a business faces, but often merely "about" something is not sufficient for a good report. Frequently a report tries to persuade the target reader to agree with a stated message, and to make him or her take an action desired by the writer or the sponsor of the report.

Throughout the entire process from starting up a project or any other task till its carrying through and completion, people involved in it often have to write letters, memos, reports, and other internal communications. Some of these are informal reports, which will not be discussed in detail in this book except for two or three examples.

The writer of formal reports is expected to collect information from all likely sources, based on numerical data, and write a report which provides information, presents a summary of discoveries or findings concerning a specific problem, arrives at a definite conclusion, proposes a course of action, and /or makes recommendations on a specific subject for a specific reader.

For a definition appropriate to the good part of this book, a report is a formal document that:

- ☞ provides a clear description of the problem or of a specific subject
- ☞ presents all possible causes for the problem, and /or all major aspects of the topic
- ☞ organizes your considerations and /or findings, with your analysis of the main facts
- ☞ makes your conclusions and recommendations for solving the problem
- ☞ appears in professional formats or settings of data in a tight organization
- ☞ tries to offer active contribution on a specific topic to the sponsoring organization.

Let's have an example here in its gist form. If you were to write a fact-finding report titled "Why Sales Declined?", the specific subject of the report would be your fieldwork and discovery of possible factors that have led to the drop in the sales of a certain product or of a certain department. In your writing, try not to go beyond this specific subject. For instance, do not say too much about the market in general. And do not say too much about the technical aspects of the product under discussion, since your chosen topic is on its sales.

Instead, the findings documented in your report should include sales figures recorded in recent months or weeks or years, the rate of decline of the product or the department, weekly or monthly fluctuations in sales, possible causes of the decreases, and likely ways of correcting the trend.

The potential reader or readers of such a report can be the top management of the department or of the company, and this can be your opportunity to impress them by highlighting some bright ideas on feasible measures to bring up the sales figures.

1.2 Types of Reports

There are many situations that call for the writing of reports, and there are many reasons why people write reports. And there are many types of reports, depending on how we sort them. Sometimes we group reports by where they are found, such as academic reports, laboratory reports, and public statements.

On another parameter we may classify reports by deciding whether they are informal or formal.

"Informal" reports, like the term "report" proper, is a general term covering many sorts. They may be a report submitted to the lecturer by a college student on his selected readings of a subject, or a notice put on the wall announcing a power cut, or a draft paper listing the advantages and disadvantages of setting up a warehouse near a port for corporate use. Of course some of these can be very formal, too.

And there are many varieties of the "Formal" report. These include abstracts, status reports, market reports, feasibility reports, problem-solving reports, budget reports, product analyses, market segmentation analyses, research reports, investigation reports, marketing planning reports, marketing proposals, accident reports, annual reports from businesses, progress reports, inspection reports, consumer accounts, instructions, and many others.

Sometimes belonging to this group are booklets, manuals, notices, catalogs, newsletters, computer software packages, training programs, and other materials used in business operations.

This book will mostly focus on formal reports used in the business community for external circulation, or distribution outside the company where you work.

A third way to classify reports is according to their functions. In this regard there are also many kinds, and so far there is little consensus among even experts on the classification. But we can have some idea about functioning reports by looking at these terms: feasibility reports, process reports, lab reports, term reports, et cetera.

No matter how we group them, reports are often created to do one or two or more of the following, and these functions are not mutually exclusive:

☞ inform
☞ instruct
☞ explain
☞ motivate
☞ persuade
☞ reinforce (prior discussions / communication)
☞ recommend

1.2.1 Information Reports

Here we would like to single out one way of classification for utility purpose: the division of formal reports into two main types: information reports and recommendation reports. After a brief discussion of the two kinds in these sections, we are going to focus the larger share of the pages in this book on the recommendation type.

Information reports include notification or notice, announcement, accident report, annual report, progress report, inspection report, trip report, meeting minute, an account describing a group of consumers, and an instruction or guide for the end-users of instruments or appliances.

In information reports, facts are organized well and presented comprehensively. But there is little analysis or interpretation of the facts presented.

An annual report, for example, presents shareholders and other readers with major facts about a company's operations during the past year and the expectations for the year ahead. For another instance, a progress report gives the status of an on-going job or project. And if the lack of accuracy can be pardoned here, we may say that quite a proportion of newspaper articles belong to the type of information reports.

1.2.2 Recommendation Reports

Sometimes also called problem reports, this type of documents includes feasibility report, problem-solving report, budget report, product analysis, market analysis, research and investigation reports, marketing report.

Unlike information reports, **Recommendation** reports are analytical in nature. These reports analyze the facts, make logical conclusions and give appropriate recommendations. It most often tries to persuade the reader to agree with a stated message, or make him take a desired action.

In the later chapters of this book, we will consider four types of writing most frequently used in practical business operations: the problem-solving report, the progress report, the feasibility report, and the marketing report.

Feasibility reports draw conclusions from information which indicates the likelihood of a project succeeding. A construction company, for example, will not go ahead with a high-rise project if the feasibility report indicates that it is unlikely to recover the cost of construction within a reasonable period of time.

Problem-solving reports aim to identify the cause of a problem and then suggest ways to treat it. These require a great deal of thought and analysis to find the best solution(s) to a problem.

1.3 Short Reports

This subtitle may sound out-of-place for this chapter, since reports belonging to this category can be as varied as any other classification, and its terming does not agree with the rest of the types discussed here.

But the author means just that: despite its abrupt positioning, we are using this space for a few words on reports that are brief in subject matter and short in length. Short reports serve business purposes in their own right. Shortness does not imply any surrender to quality or utility. If anything, they are more organized and "distilled", so to speak.

We might as well have a look here at the structure and organization of two typical short reports, before we talk about the structures of other and formal types in the next chapter. In fact, beginning from the next section, we will no longer speak of short or informal reports in any length.

Figure 1.1 Skeleton of a short and informal report

To: ××××
From: ××××
Date: ××××
Subject: ××××

Figure 1.2 Highlights of a short but formal report

Title
Transmittal information *

State the Problem to be dealt with
Explain the Background and Methods used
Present Research Results and other data
Provide your Analysis of the available data
Give your Conclusion or conclusions

* Transmittal information includes "who writes what for whom"

1.4 Big Reports

A big report may contain many reports of varying lengths and types. Below is but one of the many possible specimens. Unlike the "Small Reports", a big report is not a type by itself. Rather, it is a collection of documents necessary for a big project of economic or national importance.

For example, ***Memorandum of Understanding of the Appraisal Mission of the Asian Development Bank for the Proposed X-Y Railway Project*** (May, 2001) is a big report. It has understandably many subtitles, and under one of them, "Status of Project Preparation", there are these reports, each conforming to the requirements and structures of its type:

☞ Project Proposal
☞ Feasibility Study
☞ Environment Impact Assessment Report
☞ Resettkenebt Plan
☞ Technical Design
☞ International Procurement Packages
☞ Project Coordination Plan
☞ Resettlement and Environmental Monitoring Report

And the list is not complete. In fact, there are more reports down each of the listed entries. The reports that are grouped (but unlisted here) under the listed categories may or may not be small reports. Some can be longer or more voluminous than the most complicated report sampled in this book.

And now please look at this partial structure describing the "Background" section within another long report:

Background

A. Sector Description
    A1. Transport
    A2. Institutions and Providers
    A3. Investments and Subsidies
    A4. Infrastructure and Transportation
    A5. Performance and Repayments
B. Government Policies and Priority Plans
C. External Assistances
D. Risks Control
    D1. Lessons Learned
    D2. Important Cases
    D3. Precaution Measures
    D4. Supervision & Monitoring

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