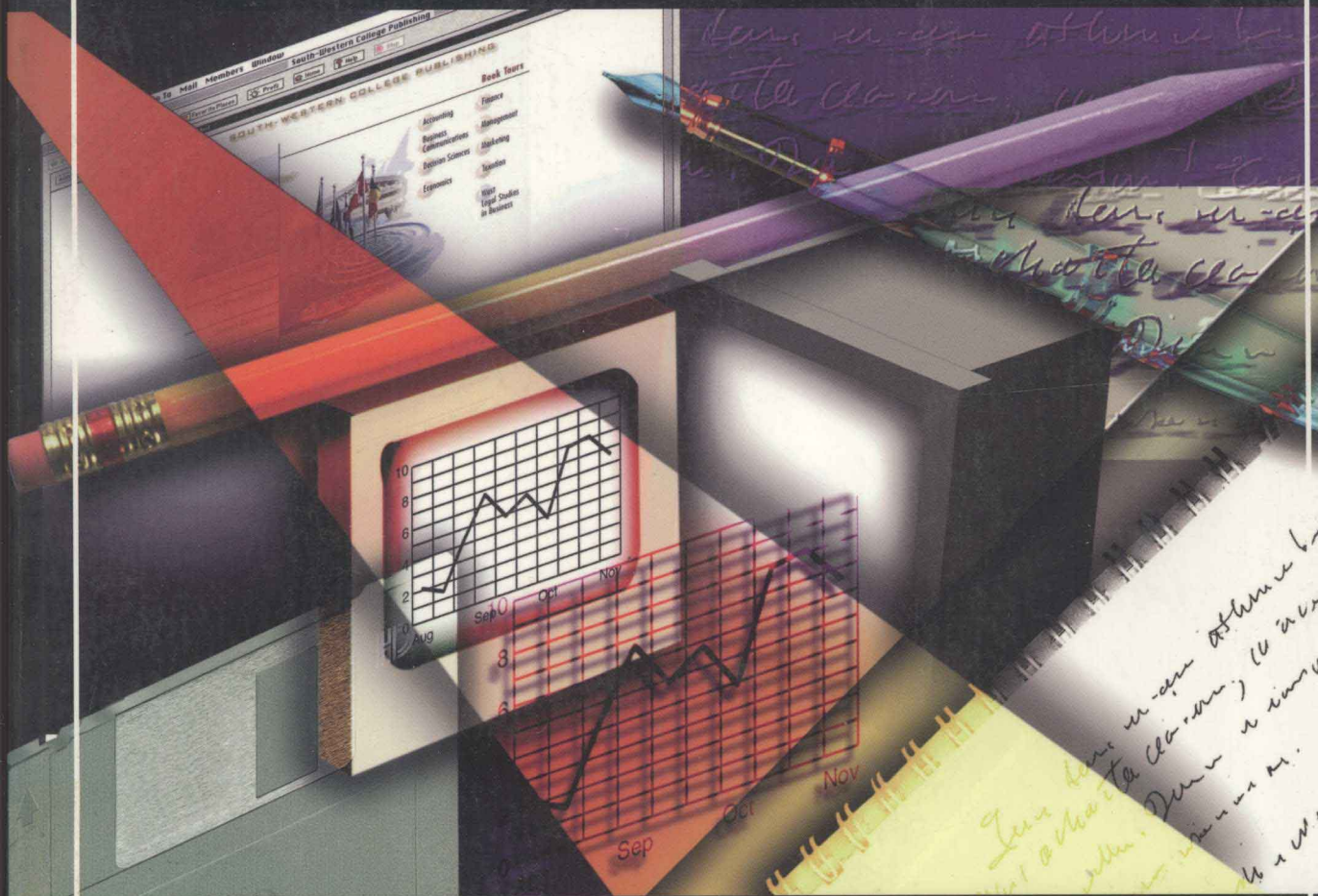


Contemporary Business Report Writing

2nd Edition



Kuiper ♦ Kohut

CONTEMPORARY BUSINESS REPORT WRITING

SECOND EDITION

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P R E F A C E



Contemporary Business Report Writing is a flexible teaching-learning tool designed to help students develop general research and reporting skills. The text contains general guides for report writing, specific guides for a variety of reports, many illustrations, and abundant application exercises and cases that augment research, writing, and speaking skills. The text can be used for seminars or for courses ranging from a few weeks to a full quarter or semester.

PURPOSE, SCOPE, AND STRUCTURE

The primary purpose of *Contemporary Business Report Writing* is to enable students to approach their reporting responsibilities with confidence. Guides for effective reports emphasize the importance of all steps in the report writing and presentation process.

Contemporary Business Report Writing contains 16 chapters and is divided into five parts. Easy-to-use appendixes provide supplementary information to improve the quality of business research and reports.

- Part I (Chapters 1-4), *Orientation to Business Reports*, introduces students to business reports. It discusses report characteristics, report style and format, guides for planning and writing reports, and guides for effective construction and use of visual aids.
- Part II (Chapters 5 and 6), *Simple Reports*, directs students' attention to the significance of simple reports in organizational communication and provides examples of various routine and nonroutine reports.
- Part III (Chapters 7-11), *Conducting Business Research*, develops students' skills in planning research, selecting appropriate primary and secondary data sources, and using those sources accurately and ethically.
- Part IV (Chapters 12-14), *Specialized Reports*, guides students through the processes of outlining, drafting, revising, editing, and formatting complex reports, such as business research reports; business plans; as well as policies, procedures, and instructions.
- Part V (Chapters 15 and 16), *Presenting Reports Orally*, reminds students that reports are not confined to written media. This part guides students

through the steps of planning, creating, and delivering an effective business presentation.

- **Appendixes.** Appendix A lists and explains 20 frequently observed writing lapses (FOWLs). Students who learn to identify and overcome these lapses will improve the quality of their writing significantly. Appendix B lists several sites on the World Wide Web from which researchers can obtain useful information for reports. Appendix C provides guides and examples of report documentation in the styles recommended by the American Psychological Association and the Modern Language Association.

As a package, the book provides instruction in the fundamental requirements for preparing effective business reports. Through many learning strategies—reading, discussion, and application of knowledge—students are led throughout the essential stages for production of effective simple and specialized reports. Abundant examples and illustrations reinforce the verbal information, and students are frequently asked to consider the ethical implications of their research and report activities, as well as the ways in which communication technology enhances those activities.

SPECIAL FEATURES

Contemporary Business Report Writing has several unique features.

1. Contemporary business examples, illustrations, and applications reinforce traditional principles for effective writing and speaking.
2. The ethical aspects of reporting are integrated with instruction about the research, writing, and speaking processes. Chapter 1 presents a model of routes to moral judgments. Each chapter thereafter contains a section on Ethical Considerations. Selected applications also address the issue of ethics in the reporting process.
3. The technical aspects of reporting are integrated with instruction about research, writing, and speaking. Students are encouraged to master technology that will improve all skills required for effective research and reporting, ranging from data gathering through final oral or written presentation of the research results.
4. A variety of end-of-chapter activities (Topics for Discussion and Applications) reinforce the concepts and guides presented in each chapter. Cases presented at the end of each of the five parts foster cumulative learning. To complete these cases, students must draw on knowledge gained from all chapters studied to that point. A supplemental case provided in the Instructor's Manual continues instruction, enabling students to experience a variety of reporting requirements within a single business.

ACKNOWLEDGMENTS

This book reflects the influence of many people in our personal and professional lives. We acknowledge with gratitude

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We invite you, the users of *Contemporary Business Report Writing*, to share your suggestions and recommendations with us.

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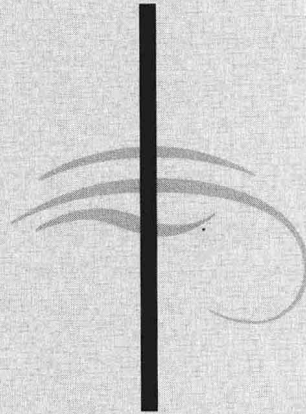
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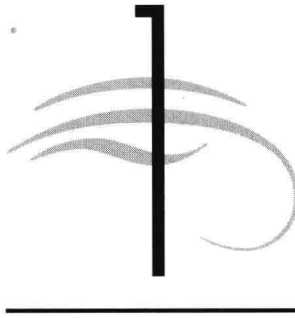
ORIENTATION TO BUSINESS REPORTS

Reports are essential tools in organizational communication, affecting the decision-making process at all organizational levels. Since reports are so vital to organizational success, they will also influence your career success. Reports originating with other people will convey information that you need to perform your duties effectively, and reports that you originate will provide information that others need to meet their responsibilities and to evaluate your performance.

Part I introduces you to the reporting function in business and writing considerations that apply to all types of reports. The four chapters in this part are:

1. Report Characteristics
2. Report Style and Format
3. Planning and Writing the Report
4. Illustrating the Report

CHAPTER



REPORT CHARACTERISTICS

LEARNING OBJECTIVES

After you have read this chapter, you should be able to:

1. Explain the functions of business reports.
2. Describe the characteristics of effective reports.
3. Identify ethical concerns related to report writing.
4. Apply writing skills necessary to create effective, ethical reports.

What do a bank manager, computer sales representative, retail store manager, vice president of a manufacturing company, and a legislative aide have in common? Although their job descriptions may show considerably different duties, one task is common to all: preparing reports.

FUNCTIONS OF BUSINESS REPORTS

Business reports are organized, objective presentations of observations, experiences, or facts used in the decision-making process. Some reports supply information necessary for decision making; others convey information about decisions that have been made and must be implemented. Since people at all levels of an organization must make or carry out decisions, reports are used in every kind of job. For example, a report may be as simple as a bank manager's oral reassignment of a teller from an inside work station to a drive-up window after the manager observes that cars are lining up at the window. Or a report may be as complex as a retail store manager's written analysis of the store's operations, competition, and goals, concluding with a recommendation that the business be relocated.

For many students, the word *report* suggests a term paper, a book review, or a case analysis. But those documents differ from on-the-job reports in many respects. Whereas you may write a term paper to demonstrate your

knowledge of a subject, you will write business reports to influence actions of other people. Although school reports usually flow upward (from student to instructor), business reports move up, down, and across the formal organizational structure. You may use the Internet or books and journals from your university library as the major data sources for a term paper; but your business reports will frequently contain data drawn from company files or your experience and observations as well as from print and electronic media. The quality of a term paper may affect your course grade, but the quality of a business report can determine the success or failure of your career—and that of your company.

The role of reports in the decision-making process is shown in Table 1-1. The illustration suggests five reports related to a single business situation, entering an international market. The first report is an informal oral report by a J. Pac sales associate to the sales manager. Assume that J. Pac is a major United States manufacturer of gas grills. The sales associate recently returned from a vacation in Brazil, which is a significant regional producer and consumer of meats. While in Brazil, the sales associate noticed that many restaurants serve meats to order—including lamb, beef, pork, fish, and fowl—and those foods are often grilled. Many families also enjoy outdoor grilling. However, the grilling is done primarily over charcoal. Although gas is readily available to homes and restaurants, the use of gas grills is minimal at this time. The sales associate thinks there is a potential opportunity to enter the Brazilian market with J. Pac's top-of-the-line gas grills.

As Table 1-1 shows, the initial oral report by the sales associate could lead to a series of reports related to the feasibility of marketing gas grills in Latin America. Those reports may be simple or complex, oral or written, formal or informal. Moreover, reporting occurs at every level of the organizational structure. Reports perform many functions in the organization, but the primary function is to improve the decision-making process and the quality of actions based on those decisions.

CHARACTERISTICS OF EFFECTIVE REPORTS

Effective reports are understood by the reader as the writer intended, and they influence the reader to act as the writer desired. The writer's objectives are most likely to be achieved if they correspond with the needs and objectives of the reader. An effective report is accurate, clear, empathetic, and concise. Above all, an effective report presents information ethically.

Accuracy

Effective decisions can be made only if they are based on accurate information. Consequently, the first criterion for effective reporting is accuracy. The effective reporter attempts to gather accurate, objective data; verifies data when necessary; and presents the data accurately. Correct data are conveyed through accurate number use, word choice, spelling, grammar, and punctu-

TABLE 1-1 REPORTS AND DECISIONS

Sender	Receiver	Report Content	Report Characteristics	Decision/Action
J.Pac sales associate	J.Pac sales manager	Consumers in Brazil enjoy grilled meats; most use charcoal; potential market for our gas grills	Oral; informal	Sales manager does preliminary research; relays information to vice-president for marketing
Sales manager	Vice-president for marketing	Burgeoning consumer market is attracting many U.S. companies to Brazil; several of our competitors are already selling gas grills in Latin America	Written; semi-formal; supplemented by oral summary	Vice-president for marketing asks director of market research to conduct further research about feasibility of entering Latin American market
Vice-president for marketing	Director of market research	Summary of previous reports; request to study feasibility of entering Latin American market	Written; semi-formal	Director of market research assigns task to research staff; requests research proposal
Director of market research	Research staff	Summary of vice-president's reports; requests research proposal	Oral; informal; part of weekly staff meeting	Staff begins work on research proposal
Research staff	Director of market research	Proposed plan for feasibility study	Written; formal	Director approves plan; staff conducts study
Research staff	Director of market research	Findings, conclusions, recommendations of feasibility study	Formal; written; perhaps supplemented by oral presentation	Director asks staff to present report to management committee

ation. Careful use of visual aids also promotes correctness. Compare the following examples of incorrect and correct portions of reports.

Incorrect: The projector cost is \$49.50; \$30.00 for labor, \$9.50 for materials, and \$20.00 for indirect costs.

Correct: The projected cost is \$59.50 per unit: \$30.00 for labor, \$9.50 for materials, and \$20.00 for indirect costs.

OR

The projected unit cost is:

Labor	\$30.00
Materials	9.50
Indirect costs	20.00
Total	\$59.50

Completeness is another aspect of accuracy. Incomplete messages that omit essential data are likely to be inaccurate. Senders of incomplete messages tend to assume that the reader knows or will “fill in” details that the reader, in fact, may not know or cannot supply. Consequently, receivers of incomplete messages often interpret them quite differently from the sender’s intention. Compare the following incomplete and complete presentations of information. Which versions are more effective?

Incomplete: The editorial staff will meet at 8 on Tuesday.

Complete: The editorial staff will meet at 8 A.M. on Tuesday, March 1, in Conference Room A.

OR

Editorial Staff Meeting

When: Tuesday, March 1 at 8 A.M.

Where: Conference Room A

Incomplete: Orders from Oxford Corporation have declined during recent months. Please let me know soon what you plan to do to revive this account.

Complete: Oxford Corporation’s orders for computer disks and copy paper went down 10 percent each month during August, September, and October.

Please give me a detailed action plan for that account before November 15. Include in your plan the number of calls you have scheduled, whom you will contact, what questions you intend to ask, and what special offers, if any, you will make to revive that account.
