How To Books

BUSINESS BASICS

WRITING A REPORT

A step-by-step guide to effective report writing

John Bowden

Fourth Edition

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Writing a Report

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How To Books

BUSINESS BASICS

Writing a Report

A Step-by-Step Guide to Effective Report Writing

John Bowden

4th edition

How To Books

This book is dedicated to the memory of my father,
Jack Leslie Bowden.

Cartoons by Mike Flanagan

The information in this book was as up to date as possible at the time of writing. However, details are subject to change and readers are cautioned to check the current position before making arrangements.

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IS THIS YOU?

Businessperson		Student
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Teacher		Computer user
	Researcher	
Writer		Designer
	Salesperson	
Town planner		Education manager
	Doctor	
Parent		Traveller
	Communicator	
Course tutor		Health manager
	Hobbyist	
Advertiser		Self-employed
	Manufacturer	
Financier		Transport officer
	Accountant	
Marketer		Publisher
	Business consultant	
Voluntary group organiser		Charity officer

PREFACE
TO THE FOURTH EDITION

Successful report writing requires a combination of substance and style: having something worthwhile to say and knowing how to say it effectively.

This updated and extensively revised handbook provides a complete guide to creating professional, persuasive reports which will give you the competitive edge in selling your ideas and winning your case. It shows you how to produce reports that will be:

read without unnecessary delay

understood without undue effort

accepted and, where appropriate, acted upon.

To achieve these aims you must do more than present the relevant facts accurately; you must communicate in a way that is both *acceptable* and *intelligible* to your readers.

The book is divided into three parts. Part 1 describes the systematic approach needed to produce an effective report, regardless of the subject matter. It takes you step-by-step all the way from being asked to write a report to issuing a tailor-made product which meets the needs of all your readers.

In Part 2 we turn to the creative side of writing. Producing a professional report today requires a merging of the technologies of *communication, computers* and *graphic design*. What you say is important. But how you say it and how it looks are vital in creating a high-impact report that stands out from the deluge of material your audience inevitably receives.

Part 3 describes some common types of report in more detail. This section complements Parts 1 and 2 by highlighting the particular emphases associated with each report type.

Reports are important. They are a key component in virtually all

major decision making. Today, good communication skills and the ability to write effective reports are *essential* competencies for every successful businessperson.

This book is based on many years' experience of report writing and helping other people write their reports. It seeks to guide, to advise and most of all to stimulate the reader.

JOHN BOWDEN

PART 1

1
Preparation and Planning

Failing to prepare is preparing to fail. The importance of planning and gradually refining the framework for a report cannot be stressed too highly. Often, however, writers simply ignore this aspect or dismiss it as being too mechanical to be worthwhile. As a result they plough too quickly into the writing process itself and end up failing to realise their full potential. Anything you commit to paper before your overall plan has taken shape is likely to be wasted; it will be like a bricklayer starting to build the wall of a house before the architect has drawn up the plans.

Before you write a single word you must:

Identify your precise purpose

Identify your readership

Identify your objective(s)

Identify your resources

Think about your content

Prepare your framework.

Collectively these activities constitute the planning stage of report writing, and the amount of time and thought you spend on them will make a vast difference to the effectiveness of all the work that will follow. This chapter considers each activity in turn.

Identifying Your Precise Purpose

If someone has asked you to prepare the report, make sure you know

precisely what is expected of you. In other words, ask for terms of reference. If the response to your question is in any way ambiguous (for example, 'Just do a report on absenteeism'), it is a good idea to write down what you believe are the intended terms of reference preferably in just one sentence and then seek confirmation that this is indeed what is required. (For example, 'Absenteeism in the Cardiff and Edinburgh Branches of ABC Limited, 19921997'.) It is equally important to define your precise purpose when you have initiated the report yourself. Only by continually thinking about this purpose can you expect to remain relevant throughout and ensure that everything that *should* be covered *has* been covered.

Identifying Your Readership

Your aim is to communicate, and the effectiveness of communication is measured by the quality of its reception, not by the quality of its transmission. So ask yourself:

Are the readers alike or mixed?

Are they used to reading and understanding reports?

Will they be expecting a formal or informal report?

How much time will they spend on this report?

Are they familiar with the subject?

What do they already know?

What else will they need to know?

What are their attitudes to the subject and to me?

What is the relationship between them and me?

You would write different things, and in different ways, when addressing your boss, your staff or members of the public.

Meet Your Readers

If possible, find answers to questions such as:

Do they use, or at least understand technical terms?

What sort of publications are in their offices?

If you cannot meet them in person, then phone them or ask someone about them. Failing this, at least establish their occupations. This will give you some useful clues, from which you might ask:

What deductions can I make about their education, training and technical ability?

What priorities, attitudes and prejudices are they likely to have?

Obviously you are generalising; accountants are not all alike, nor are publicans, or any other group. However, you can make some reasonable assumptions about them, which gives you something to work on.

Be Appropriate

Always remember that you will be writing for real people. Good doctors talk to fellow professionals in a very different way from how they talk to patients, in terms of both content and presentation. Similarly, try to write in the way that is most appropriate for your readers.

Clearly, the more diverse your readership, the more difficult it is to pitch the report at the right level. Is one reader more important than the others? If so, target the report at him or her. If not, there are ways of getting around the problem of a mixed readership. It can be done by issuing two or more reports or and this is more likely by including a summary, a glossary, and/or some appendixes. In this way the interests of a wide range of readers can be accommodated.

Identifying Your Objective(s)

What do you hope this report will achieve? What results are you hoping for? What do you want to happen next? Only when you have identified this 'bottom line' can you begin to concentrate on getting your message across effectively.

Here are some possible overall objectives for a report writer although in practice any report is likely to be produced for some combination of these reasons:

to inform

to describe

to explain

to instruct

to evaluate (and recommend)

to provoke debate

to persuade.

The information you will include in your report, and the way you might arrange it, will be dictated largely by your overall objective(s). For this reason the more closely you can identify your objective(s), the more useful your report is likely to be.

Identifying Your Resources

You need to know what resources will be available to you before, during, and after your project, such as:

How many working hours have been allocated to it?

What is my budget?

What equipment or apparatus will be at my disposal?

When will it be available?

Can I reserve a quiet and peaceful room where I can write the report once the project has been completed?

Until you know your resources (or possibly your lack of resources) you cannot realistically decide what information you will gather or how you will present your findings.

Thinking About Your Content

Your aim is to make the best use of your limited resources in order to

obtain adequate relevant information which, when properly handled and presented, will enable you to:

achieve your precise purpose

meet all your readers' needs

realise your overall objective(s).

Analyse the subject to determine the main features to be examined. It is often helpful to make use of the Pareto Principle which states that eighty per cent of what is important is represented by twenty per cent of what exists. This is also known as the eighty-twenty rule, and can be illustrated by the following examples:

Eighty per cent of horse races . . .   are won by twenty per cent of horses in training.

Eighty per cent of a company's revenue . . .   is generated by 20 per cent of its customers.

Eighty per cent of a speaker's message . . .   is contained in twenty per cent of his words.

While the eighty-twenty rule should not be taken literally, it is a very useful concept which will remind you to always concentrate on what *really* matters.

Preparing Your Skeletal Framework

You are now in a position to think about the overall plan of your report. This is known as the skeletal framework. It is like drawing up the plans for a new house. Not only will it show its overall structure, it will also remind you of the materials (information) you will need to gather before the process of construction can begin. A well-planned skeletal framework is the key to effective report writing since it enables the writer:

to be sure there is no misunderstanding over the terms of reference

to have an overview of the entire report

to be reminded of what information must be collected, and what is not needed

to order his or her thoughts before considering how they should be expressed

to appreciate the significance of and the relationship between the various items of information that will be gathered

and to maintain a sense of perspective while gathering this information and, later, when writing the report.

You may find it necessary or desirable to revise this framework once the project has been completed; for example, you might need to highlight some particularly important finding. However, it is far easier to revise a skeletal framework than to attempt to structure your findings without an initial plan.

The skeletal framework you choose will be influenced by these factors:

the requirements of the person who commissioned the repot

house-style

custom and conventions

your objective(s)

your readership

common sense.

Let us consider each factor in turn.

The Requirements of the Person Who Commissioned the Report

If possible, agree the framework of the report with the person who asked you to produce it. In this way he or she will be *expecting* a structure similar to the one you will be providing. After weeks or perhaps months of hard work, it is extremely frustrating to hear those dreaded words: 'But I expected you to present it entirely differently from that'.

House-style

Many organisations have their own house-style. For example, do they talk about house-style, house style, house-rules or house rules? Such consistency helps the writer, the reader, and the typist or printer. It also projects the same organisational image to the outside world. Sensible house-style will help the writer by providing practical guidance. However, it should never be so rigid as to impede individual style.

Custom and Convention

Some routine reports are always presented in the same way, often on standard forms. For example, they may compare certain key statistics from one period to another. If you are asked to complete such a report, you will have little or no scope to influence its presentation. Simply refer to previous reports to see what is required. However, if you believe that the existing format could be improved in some way and if you can justify this then do not be afraid to say so.

Your Objective(s) and Your Readership

You now know that it helps to establish your objective. Perhaps you intend to persuade your chairperson (your reader) to authorise the purchase of product A rather than product B (your objective). Or perhaps you wish to instruct your staff (your readers) how to use a particular item of machinery (your objective). Clearly, these are different messages to different audiences, and what you say and how you say it will be strongly influenced by these two factors. The best single piece of advice to bear in mind is never *write* anything that you would not *say* to your readers face-to-face.

Common Sense

Remember that the task of the report writer is to supply his or her readers with the information they need in a form they can understand. A report is a means to an end to inform, to explain, and so on it is *not* an end in itself. Your aim therefore is to communicate effectively, not to produce a literary masterpiece.

Attracting the Reader

The report will succeed only if it is read without unnecessary delay, it is understood without undue effort, its findings are accepted and, where appropriate, acted upon. You are writing for real people so design a framework that *they* will find attractive and useful.

Where practicable, talk to your future readers; there is little worse

than attempting to produce a report in a vacuum. What kind of structure would they like to see? Do not promise to meet their every demand, but let them know that their views are important and appreciated (which they should be). If you are able to produce a report which largely meets its readers' express needs, you will have gone a long way towards getting the results you are hoping for. Any reader who feels that a report has been prepared with him or her in mind is unlikely to reject its findings.

Planning a Structure

Think very carefully about this, because if you can design a suitable framework everything else will then fall into place. Always remember this adage: tell them what you are going to say, then say it, then tell them what you said. This may sound trite; it isn't, because it gives you the opportunity to highlight the most important parts of your report. Also, people tend to remember what they read first and last far more than what they read in the middle of any document (this phenomenon is known as the effect of primacy and recency).

So give them a beginning, a middle and an end. It is your task to select the most appropriate components to build up each of these main sections.

What options are available to you? All reports have a number of commonly recognised components, including:

The Beginning

Title page

Foreword

Preface

Acknowledgements

Contents page

Summary or Abstract

Introduction

The Middle

Main body, including substructures

The End

Conclusions

Recommendations

Appendixes

References

Bibliography

Glossary

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Do not be concerned about the large number of components that may be used; no report ever uses all of them. However, it is as well to know something about each of these components for two reasons:

You can then choose the ones best suited to your report, and

You may be asked to include one or more of them.

Let us take a look at each of these components; this will help when thinking about a simple framework that is suitable for many types of report.

Title Page

Every report should have a title page. This tells the reader (and any potential reader) what the report is about. A good title page will include the following information:

The title.

The name and position of the person who authorised the report.

The name of the author(s).

His, her or their position within the organisation.

The name of the organisation.

The date the report was issued.

A reference number.

Copyright information, if necessary.

Its degree of confidentiality.

The distribution list.

Title

The title should be clear, concise and relevant; restate your terms of ref-

erence in your own words. Do not choose a title which is similar to any other report title. Providing a subtitle is a good way of keeping the title crisp while also providing more detail about its content. Make sure the title is more prominent than any headings that appear in the report.

Authorisation

Then say who commissioned the report (for example, 'Produced at the request of. . .').

Names and Dates

The decision about whether to give your first name and any qualifications you may have attained should be dictated by house-style. However, as a general rule, people within your organisation will not need to be reminded of your qualifications whereas relevant qualifications will add authority to a report which is distributed externally. In the same way it is not necessary to say that you work for ABC Ltd, if the report is for internal circulation alone. The date on the report should be the date it was actually *issued*, not when it was sent to the typist or printer. Write this date in full to avoid possible ambiguities. For example, the date 12.8.98 means 12th August 1998, in Britain. In the USA it means 8th December 1998.

Reference Number

The reference number given to the report will depend on company practice. Some organisations number all reports sequentially; others do so by department and yet others add some personal reference (perhaps the initials of the author).

Copyright

The decision whether to refer to copyright depends on the nature of the report. For the report writer the main interest in the English law of copyright is its intention to prevent the copying of a 'substantial part' of any literary work without permission. The word 'literary' covers any work expressed in printing or writing, provided it is substantial enough to have involved some literary skill and labour of composition. If you wish to know more about this, refer to the current edition of the *Writers' and Artists' Yearbook* at your local reference library.

Confidentiality

You may decide to stamp your report 'Secret' or 'Confidential'. The latter is a particularly useful marking when the report is about a member

of staff, as it would be a strong defence against any subsequent charge of libel. Again you may wish to refer to the current edition of the *Writers' and Artists' Yearbook* for further information. However, do not overdo it. The most routine reports arouse exceptional interest when marked 'Secret'. Conversely a report giving a foolproof method of how to win the National Lottery would probably go unnoticed as long as it was not given a security marking.

Distribution

Finally, the title page should include the distribution list of the report. Ask the person who requested the report to tell you who should see it. Their names will generally be listed in order of seniority. However if you foresee any problems or disputes, perhaps because of internal politics, or if the report is to be sent outside your organisation, list the recipients alphabetically or by geographical location. Also remember to include at least one copy for file. Record this at the foot of the list.

Foreword

This component is rarely used in a report. When it is included it is generally not written by the report writer but by some (other) acknowledged expert in the field perhaps the person who commissioned the report. A foreword should be concise.

Preface

This is another uncommon component. It is used when a writer wishes to convey some personal background details behind the report's production.

Acknowledgements

This section is used to convey your thanks to people and/or organisations who helped during the preparation of the report. For example they may have provided information, help, finance, or granted permission for you to use some copyright material. Do not go over the top with your thanks and try to keep it balanced and in perspective. For example, you may 'wish to record (your) thanks to Mr X' (who assisted you for an hour) and later 'to convey (your) special thanks to Mrs Y' (who helped for a week).

If a large number of people assisted you it may not be possible, or even desirable, to name them all. One way of getting round this is 'to thank the management and staff of ABC Ltd'. Alternatively, you could record a blanket acknowledgement such as: 'I also wish to thank every-

one else who assisted during the preparation of this report'. In this way you are covered if you have forgotten to mention somebody by name.

As a general rule it is unnecessary to express your gratitude to people who would have been expected to help you (such as your staff or members of the typing pool), unless they made some special effort on your behalf. Read acknowledgements in books to see how they should be written. Sometimes this section is placed at the end of the report.

Contents Page

A contents page is essential for any report exceeding three pages. It should be on a separate sheet of paper and it should list the various sections of the report in the order in which they appear. The headings on the contents page must be identical to those used in the text, with the appropriate page (and/or paragraph) number alongside them. If you have used more than just one or two illustrations then provide a separate list of these below the section headings. Your page numbering and paragraph numbering systems should be simple and consistent.

Summary or Abstract or Synopsis

This component is particularly useful when you have a diverse readership. It has two functions:

To provide a précis of what the recipient is about to read or has just read.

To provide an outline of the report if the recipient is not going to read the entire report.

An average manager's reading speed is between 200 and 250 words per minute, and he or she comprehends only 75 per cent of this. It is therefore extremely important to highlight the salient facts and the main conclusions and recommendations, if any. Obviously it cannot be written until *after* the other components of the report. Keep it concise; it should never exceed one page. Do not introduce any matter which is not covered within the text of the report.

A summary *could* contain just five paragraphs:

Intention (your purpose and scope)

Outline (what was done and how it was done)

Main findings

Main conclusions

Main recommendations (if necessary).

As a general rule, the more senior the reader, the less detail he or she will require. For this reason a reader is sometimes sent a summary *instead* of the entire report. When this is done the covering letter should offer a copy of the full report, if required.

Introduction

This section sets the scene. While the title page gives a broad indication of the subject, the introduction tells the reader what it is all about. A good introduction will engage the readers' interest and include everything that they will need to know before moving on to the main body of the report. It will contain certain essential preliminaries which would not be weighty enough individually to justify headings of their own. These might include:

Why was the report written? Who requested it, and when?

What were your terms of reference? *Always* refer to these in the introduction.

What resources were available to you? (For example, staff, time and equipment.)

What limitations, if any, did you work under? What were the reasons for this? (For example, 'The report does not analyse departmental expenditure in June because the figures were not available'.)

What sources of information did you use? How did you obtain this information?

What were your methods of working? A technical report will require a technical explanation of methods used. (Some writers prefer to provide this information in an appendix.)

How is the report structured? Why did you choose this method of

presentation? This explanation helps your readers find their way around the report and shows the logic of the layout.

In some reports the first two of these preliminaries are called aims and the others are known collectively as scope.

Reports should not be anonymous documents, so it is usual for the name and signature of the author to appear immediately below the introduction. Some organisations prefer the signature to appear under the writer's name on the title page. Either way, it is best to sign every copy rather than simply sign and photocopy the master copy. In the case of professional firms preparing reports for clients, it is customary for only the name of the practice to be given. This indicates the joint responsibility of the partnership. The identity of the author is denoted by the reference.

Main Body

As the name suggests, this section contains the main discussion of your subject-matter. It is very important to plan a sensible substructure for this section bearing in mind, once again:

The requirements of the person who commissioned the report.

House-style.

Custom and convention.

Your objective(s).

Your readership.

Common sense.

There are three basic substructures to consider:

the logical substructure

the sectional substructure

the creative substructure.

The Logical Substructure

Here, procedures or events are discussed in the sequence in which they occur or occurred. Such a substructure would be suitable for a report which instructs (perhaps duty notes), or for a factual report which explains (perhaps how some event occurred). It is a very simple format

but it can become boring, especially in lengthy reports or in reports requiring a large number of cross-references.

The Sectional Substructure

With this format the information is presented in meaningful sections. For example, an internal audit report could discuss the work of each department in turn, or it could perhaps deal with each engineering or clerical function in turn. This structure is useful when a report describes (perhaps how a system works); informs (perhaps how the various components of an overall project are progressing); evaluates (perhaps the performance of various projects, possibly leading to a recommendation as to which of them the company should purchase); or provokes debate (perhaps providing a series of discussion points on various topics to be debated at a future meeting). This format is particularly useful when readers are not likely to be interested in all your findings. Each of them can select one or more sections and read them in isolation. However, it is still important to provide links between these sections for the benefit of any reader who may decide to read the entire report.

The Creative Substructure

Information is presented in an *apparently* haphazard way. In a sense it is a hybrid of the other substructures and it is most commonly used in reports written to persuade (perhaps to convince people to buy your product). If such a report is written well it can be very effective. However, you should not attempt to use this imprecise substructure until you feel very confident about your report writing skills. Both good and bad writers sometimes break the rules, but only the good writers know the rules they are breaking and so are far more likely to get away with it.

Conclusions

Your conclusions should link your terms of reference (what you were trying to do, as stated in your introduction) with your findings (what you found out, as presented in your main body). They should flow naturally from your evidence and arguments; there must no surprises. Conclusions should always be:

clearly and simply stated

objective and not exaggerated

written with the likely impact on the reader clearly in mind.

Recommendations

Do not make any recommendations unless your terms of reference empower you to do so. While conclusions refer to the *past* and/or the *present*, recommendations look to the *future*. Any comment not concerned with the future has no place as a recommendation. Your recommendations should follow logically from your conclusions. Therefore, once again, there should be no surprises.

Effective recommendations are concise and to the point. They are also specific. For example, management may need to know what should be done by whom to overcome a specific problem; it will not want to be told that some undefined action should be taken by some unidentified individual for no apparent reason.

Your recommendations must also be realistic. Perhaps the security at a warehouse should be improved. If so, do not risk the rejection of a sensible recommendation, and the general undermining of the credibility of your report, by asking for too much. It is not really reasonable or feasible to expect it to be protected as thoroughly as Fort Knox.

So think carefully about the implications of all your recommendations; talk to the people involved and, where necessary, try to come to sensible compromises. Jaw is better than war.

A good way to check whether your recommendations are well-written is to extract them from the rest of the report and then read them in isolation. Do they still make sense? If not, re-draft them until they do.

Appendixes

The purpose of an appendix is to supplement the information contained in the main body of the report. It is a way of providing adequate detail
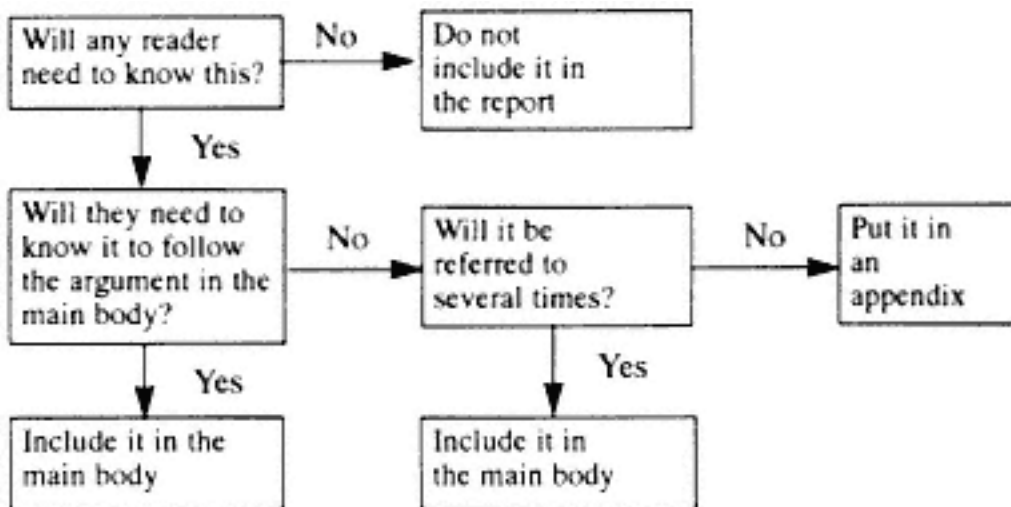
Fig. 1.
An algorithm.

for readers who require it without breaking the thread of the main body. But how do you know what information to put in appendixes, what to include in the main body and what to exclude from the report altogether? Figure 1 is an example of an algorithm that will help you decide the answer. Start at the top left.

Appendixes are useful as a way of:

Meeting the needs of a diverse readership some people will want/need to refer to them while others will not.

Substantiating and/or amplifying findings in the main body.

Presenting documentary evidence to support arguments in the main body (for example, copies of memos, reports, correspondence, instructions, forms, standard letters, questionnaires, maps, charts and so on).

Providing detailed results of experiments or investigations.

Presenting summaries of results obtained elsewhere.

Presenting statistical or comparative information.

Illustrating relationships or relative proportions by means of charts and diagrams.

Explaining systems or procedures by flow charts and/or words.

An appendix is useless, however, unless it is clearly referred to in the main body of the report and in the contents list. *Tell* the readers why they may wish to refer to it.

References

This section provides full details of the books or journals which have been specifically mentioned in the text, or from which extracts have been quoted. They should be listed in the same order as referred to in the report. Details of books should follow this style:

Audrey Segal *Careers Encyclopaedia*,
17th ed, Cassell (1997)
or, *Careers Encyclopaedia*, Audrey Segal (Cassell, 17th edition, 1997)

Journals should be recorded in this way:

> J.F.C. KINGMAN 'On The Algebra of Queues', *Methuen's Review Series in Applied Probability*, Vol 6, pp144 (1966).

Some report writers prefer to use footnotes rather than a reference section. They list each reference at the foot of the relevant page, the end of the relevant section or at the end of the report. This last method is very similar to providing a reference section.

Bibliography

A bibliography also gives full details of every publication referred to in the text. However, unlike a reference section, it may also include books and journals *not* referred to. A bibliography is useful when you have a diverse readership since you can provide separate lists for background reading, further reading and recommended reading. Details of publications are given in the same format as are references, but it is customary to list them alphabetically by the surname of the author or by the title of the book.

Glossary

A glossary is necessary when you have used a good deal of specialised or technical vocabulary. It is another useful device to help meet the needs of a diverse readership, some of whom will be familiar with the terminology and some of whom will not be. Make sure your definitions are authoritative, precise and up-to-date (words come and go and some change their meaning over time). For this reason it is important that your dictionary or reference book is a current edition.

List the words alphabetically and place the section towards the end of the report. However, if a large number of readers will need to familiarise themselves with the vocabulary before reading the report, it is better to place the glossary at the beginning.

Index

An index is necessary only for a large report. It should contain more entries than a contents page and it is perfectly acceptable for it to be presented in two or three columns. List items alphabetically and place the index at the end of the report.

Facilities for providing at least a basic index should be found in most word processors. However, always check any computer-generated index very carefully or the silliest mistakes can go undetected. In particular think about:

the *meaning* of a word, and

the *context* in which a word is used.

Some words are spelt the same way but have different meanings, such as bank (an establishment where money is deposited) and bank (the sloping ground on each side of a river). Make sure your index reflects the true meaning of a word. Some indexes do not. This excerpt is taken from page 19 of a report on local sports and recreational amenities:

The Leader of the Council stated: 'The proposal to extend the sports centre will, of course, be considered'.

The relevant index entry read:

Course,

golf-, 11

of, 19

race-, 13

Equally importantly, watch out for the context. The following example comes from a law report:

Mr Justice Straw said that he had a great mind to commit the man for trial.

In the index we find:

Straw (Mr Justice), his great mind, 14

Deciding on a Format

You've now seen that there are many factors to consider when selecting a suitable skeletal format. If you have not been given any guidance, and if your report is not one of the more common types discussed in Part 3, consider this simple format:

title page

contents page

summary

introduction

main body

conclusions

recommendations (if required)

appendixes.

Put yourself in your readers' shoes; how would *they* like the report to be structured? Then critically examine your answer. Take each component in turn and ask yourself whether it is really necessary. For example: Is the title page necessary? The answer must be 'Yes' because it identifies the report to the reader. Or: Is the glossary necessary? If all your readers know (or at least are likely to know) the meaning of all the technical words you have used, the answer will be 'No'. In that case remove the glossary from the skeletal framework since it would serve no useful purpose.

The Importance of a Framework

A well-planned skeletal framework really is the key to effective report writing. It is of even greater value if a report is to be written by a number of people, because it:

Enables each person to see the relationship between his or her contribution and the rest of the report.

Provides detailed guidelines, thereby minimising the risk of omission or duplication.

Makes it easier to maintain a consistent approach.

In such cases, however, every contributor should be involved in preparing and finalising the skeletal framework to ensure that:

Every necessary point will be covered.

Each of these points is clearly understood.

Team spirit is fostered and maintained.

Summary

It is essential to prepare and plan your report very carefully. As with most tasks, the amount of time and thought spent on these activities at this stage will make a vast difference to the effectiveness of all the work

that will follow. It will also greatly enhance the appearance and professionalism of the report.

The key to good report writing is the preparation of a well-structured and appropriate skeletal framework. However, before you can construct such a framework you must be absolutely clear about:

The precise purpose of the report.

The nature of your readership.

Your overall objective(s).

The resources at your disposal.

The information you will need to gather.

Only then can you begin to consider what combination of report component parts will be the most suitable to get your message across in the way you want.

Preparation and Planning Pay Off

This process of preparation and planning will greatly reduce the time and effort spent subsequently on writing and re-writing the report by:

Reminding you of the message you will need to convey in order to get the results you want.

Providing you with a logical and considered structure which will help you identify any gaps or illogicalities.

Enabling you to obtain an overview of the entire report, thereby helping you maintain a sense of perspective.

Providing you with clear guidelines as you collect and handle the information, and then write the report.

2
Collecting and Handling Information

Once you have carefully planned your report, it is time to carry out all the work that will be necessary before you can actually write it. In other words, you are now ready to undertake your project or investigation. Your task is to collect and handle enough relevant information to enable you to put flesh on the bones of your skeletal framework. These are the stages your research should follow:

Find adequate relevant information.

Obtain the information.

Record your findings.

Sort and group your findings.

Evaluate your findings.

Prioritise your findings.

Check your findings.

It is quite possible to write a bad report even after doing good research, but it is impossible to write a good report after doing poor research. The moral is clear: good research is *essential*.

Finding Adequate Relevant Information

By now you will have identified the information you require, bearing in mind:

the precise purpose of the report

the needs of your readers

your objective(s)

your resources

and your skeletal framework.

There are four sources of information available to you:

People

Books and other publications

Information technology

Events and places.

The information you will need may be found under any or all these categories, so you might consider each in turn.

People

You may be able to obtain the information you require from the local, national, or even the international community. Here are some possibilities:

your colleagues

members of the public

politicians

producers

manufacturers

retailers

federations

unions

pressure groups

international organisations.

It is impossible to give details of the vast number of potential sources available to you. However, here is one service that every report writer should be aware of:

The Information Bureau

Formerly the Telegraph Information Service, the Information Bureau has a reputation for being able to answer almost any question, either

instantly over the telephone or, after a telephoned request, by fax the same day. A fee is charged for each enquiry.

The Information Bureau
51 Battersea Business Centre
103 Lavender Hill
London SW11 5QL
Tel: (0171) 962 4414.

Advances in information technology provide unprecedented opportunities for report writers to communicate directly with experts around the globe.

Books and Other Publications

Perhaps the information can be extracted from a printed source, such as:

encyclopaedias

reference books

text books

guides

handbooks

journals and magazines

newspapers

maps and charts

previous reports

correspondence

minutes.

Information Technology

The information that a computer can put at your fingertips is almost limitless provided you have an almost limitless budget to pay for reference CD-Roms and on-line services that connect you with a modem! Yet even for a modest monthly budget of around £20 you can have online access to a veritable cornucopia of information, provided you are prepared to put some time and effort into tracking down the facts and figures you really want.

Information has a time value. Real-time stock prices from the London Stock Exchange, for instance, are worth more than prices that are an hour old, which, in turn, are worth more than those at the previous evening's close of business. Information also has a value that depends on how specialised and detailed it is. A CD-Rom that contains comprehensive details of British Case Law in a searchable form will be very expensive because only a small number of customers would buy it.

Fortunately, for most report writers, plenty of useful information is available at realistically low prices. You just have to set your course through the mountain of data that is available. For example, if you were looking for stock market prices, there are several possible routes, each progressively more expensive. At the simplest level, you can add a TV tuner card to your PC for less than £200. That would allow you to watch television in a small window of your PC. Add teletext facilities to such a card and it becomes possible to download information and feed it into spreadsheets or software that analyses the data.

There are literally thousands of PC CD-Rom titles available, many of them priced for the mass market at well under £100. Generally, they are still more expensive than individual reference books, but a lot cheaper than printed sets of encyclopaedias. They represent excellent value for money because they combine search facilities with multimedia, and you can use them as often and for as long as you wish.

The Information Superhighway

When computers and other communications equipment are connected a computer network is formed. The most famous of these is the Internet, which connects thousands of smaller networks and millions of users all around the world. The Internet was once the exclusive province of US government-sponsored research scientists and academics, but now almost anyone with a PC and modem can get Internet access in one form or another. It provides entry to a vast array of information from computer systems around the world. There are four basic services: E-mail, News, Chat and World Wide Web (WWW). Here are just a few of the resources now available to the report writer:

Two million computers connected with 15 million users.

Over 4 trillion characters of information available on-line.

Four million home computers connected.

Ten thousand new users every month.

Six out of ten subscribers use the Internet for their work.

The World Wide Web is a vast store of information, some of it useful, some not. The only cost is the local phone call charge for the time you spend on-line and the cost of your Internet account. For about £20 a

month, you could buy as much as 10 hours on-line, which, if used efficiently, would yield a great deal of useful data.

Searching the Web

The Web is like a huge city centre with places that strive to entertain, comfort and feed you, and also places that will insult, annoy and con you. But the places we are interested in are those that will help us find information. There are sources such as directories and robot-librarians, and groups of specialists, experts and fanatics we can ask for advice while we search for information.

There are tools to help you search the Internet. Directories are similar to *Yellow Pages* or other business directories where you can look through an index classified by business area. The best known directory is Yahoo, which comes from California (http://www.yahoo.com/). It contains tens of thousands of sites. Although Yahoo organises everything by categories, you can also search by keywords. Once you find your subject, Yahoo gives you a list of relevant Web addresses (URLs) and short descriptions of the sites.

Directories, however, cover only a small part of the Web. If you are researching an unusual topic you may not find anything in the directory. So you would need to turn to other tools. There are plenty of search engines which seek to catalogue the ever-growing content of the Web and, like the Web site and pages they index, they are free. As well as covering far more of the Web, search engines keep their information current by constantly searching the net for new sites.

The trouble is search engines tend to provide you with either far too many references or far too few. If, in reality, there are 20 or 30 sites that would be of great value to access, the search engine is likely to come up either with 2,000 or 3,000 references, or with 2 or 3! After a while though, as you become more proficient in selecting the right syntax and combination of keywords that will bring you a manageable list, it will become almost second nature to find the most efficient routes as you *surf the net*, jumping from page to page and from site to site.

The Web is a great place to find information, but sometimes you will need to talk to real people. You could E-mail the owner of the Web-site if the site has an E-mail address. If you want to meet people you have to go out and find them. This can be done by means of bulletin boards, Usenet or mailing lists.

Bulletin Boards and Usenet

Most of the big Internet providers have *Bulletin boards*, as Prodigy calls

them. They are also known as *Special Interest Groups (SIGs)* by Delphi, as *Forums* by CompuServe, and as *Clubs* by AOL. The idea is that members of groups exchange information about a particular topic. Bulletin boards are very useful if your research interest coincides with that of one of these groups. You leave messages for people, and any member can reply by sticking his or her note to yours. People can also reply personally, as if you had left a phone number on the note. Bulletin boards can be thought of as notice boards in a private place because a person with, say, CompuServe's Forum cannot also access Delphi's SIGs, or AOL's Clubs. Bulletin boards *exclude* outsiders.

Usenet, on the other hand, *encourages* outsiders. It works on the same notice board principle but is usually open to anyone, regardless of Internet supplier. Usenet is a large collection of special interest newsgroups currently there are around 20,000 of them. As with bulletin boards, you post a message (called an article) to the group and anyone can reply. But beware: the laws of libel and copyright apply equally to bulletin boards and Usenets as they do to books and articles, as many people have found to their cost.

Mailing Lists

Although a newsgroup is dedicated to one specific topic, the discussions can become very general and rambling. Mailing lists are similar to newsgroups but are more private and more closely focused. You can set up your computer to send a single E-mail automatically to share general information with all the people on the list, perhaps in the form of a monthly newsletter.

Mailing lists on the Internet are even simpler. You need to remember only one E-mail address, that of the list computer. Any message you send to this address is forwarded to every person on the list. Similarly, you get a copy of whatever each of them posts to the list. There are around 70,000 mailing lists on the Internet dealing with almost every subject you can imagine. Some are private but most are open to anyone to join. Simply E-mail a request to 'subscribe' to the server (computer) that runs the list. Once the server receives your request, you will be sent a welcome message together with guidelines and instructions.

The Internet has already had a significant impact on the scientific, academic and business communities. For example, it has speeded up the process by which ideas are communicated to a large audience. It is often possible to find the latest information in any particular field from one of the Internet's bulletin boards, long before the relevant article or book is

published. But that's just the start; you can search for and find an incredible variety of things, and you can bring what you find back to your desktop, whether it's at work or at home. The Internet can give you a foundation to build a network of contacts who are knowledgeable in the areas which interest you. Why not book a session at a library that is hooked into the net, or visit one of the cybercafés that have opened in places such as London (Cyberia at 39 Whitworth Street, near Goodge Street underground station), Aberdeen, Bath, Belfast, Birmingham, Brighton, Cambridge, Edinburgh, Glasgow, Kingston, Liverpool and Manchester? For a small half-hourly fee you can go on-line and find out what's out there.

Events and Places

Perhaps the information you require is available at one or more events or places. Here is a small sample of some local, national and international possibilities:

libraries

laboratories

research institutions

exhibitions

museums

galleries

cinemas

theatres

concerts

talks.

Libraries

In addition to local, university and college libraries, many government departments and business organisations run libraries that are open to members of the public. These include:

The City Business Library (London): (0171) 638 8215.

Westminster Reference Library (London): (0171) 798 2034.

The Central Statistical Office (Newport, South Wales): (01633) 812973.

The British Library is a copyright library. That is, it is entitled to receive

a copy of every book published in the UK. The library is divided into sections by subject and the following list gives the telephone numbers of some of its departments:

Main switchboard: (0171) 636 1544.

Biotechnology information: (0171) 323 7293.

Business information: (0171) 323 7454.

Newspaper library: (0171) 323 7353.

Patents: (0171) 323 7919.

Science and information service: (0171) 323 7494.

Science and technology: (0171) 323 7477.

It is best to phone before you visit any unfamiliar library to check opening times and confirm that you will be allowed in.

Obtaining the Information

Information can be gathered by one or more of these methods:

experimentation

reading

listening

observation

interview

letter

telephone call

questionnaire

accessing.

Experimentation

An experiment should be carried out by a trained scientist who will design and perform it in an acceptable way. The experiment should be written up as follows:

Begin with a dated heading stating clearly the objective of the experiment: 'To study . . .', 'To find . . .'.

Give a brief account of the theory underlying the experiment.

Provide a hypothesis (suggested answer), if you have one.

Give a clear and full account of how the experiment was carried out. It is usually necessary to provide a diagram of the apparatus used.

Provide a complete list of the readings you obtained.

Provide a full statement of the final result, showing the estimated limits of error.

Conclude with a clear and concise statement of what your results lead you to infer or deduce about the problem posed. If you have a hypothesis, refer to it here. If you have any relevant views on the experiment or the result obtained, include these. Also, if you believe that the experiment could have been improved in some way, explain why and how.

Reading

The way you read should vary according to the complexity of the material and the reasons for reading it. If you are reading to understand, absorb or master a topic you must read it slowly. If you are reading a novel for entertainment you can read it quickly.

Try the SQ3R method of reading:

S Survey
Q Question
R Read
R Recall
R Review

Survey

This is the preliminary review of the book or article. It involves skimming (glancing over the material and getting the feel of it) and scanning (looking at specific aspects of the publication the title, the author, the date, the preface, the introduction, the contents, any chapter summaries

and the index). In the case of a book, it is also a good idea to read the first and last paragraphs of potentially relevant chapters and the first and last sentences of a sample of paragraphs within these chapters. This scanning should give you an overall impression of the publication, such as:

Is it pitched at the right level?

Is it up to date?

Is the author a recognised authority in the field?

Is the book factual or based on opinion?

Question

Then ask yourself these questions:

What would I expect to gain if I read some or all of this material?

Is some or all of the material directly relevant to my report?

Does some or all of it provide a useful background to my report?

Read

Once you have decided to read some or all of a publication, divide your reading into manageable segments, probably chapters or sections. Read any summaries or conclusions *first*. Next read the chapter or section quickly to get a grasp of the material. Finally, read it again, more slowly, and ensure you understand it.

Recall

Think about the main ideas and facts you have been reading about and make notes of them.

Review

Are you satisfied that you have gained what you expected through your reading? Have you gathered the information you will need to help put the flesh on your skeletal framework?

Listening

Some researchers suggest that we function at only twenty-five per cent

efficiency and rarely remember what we have heard. In one investigation the proportion of information which was correctly transmitted from a senior director through middle and line management to operative staff was as low as twenty per cent. Such ineffective listening can be responsible for the following:

Accidents at work.

Production breakdowns.

Lost sales and customers.

Poor morale.

Personality clashes.

Inaccurate communication.

So how can you improve your listening skills?

Do Not:

Assume that the topic is boring or irrelevant. A good listener sifts, screens and hunts for relevant information.

Criticise delivery or presentation; concentrate on the content.

Submit to emotional phrases. Do not allow the use of phrases which you loathe to reduce your listening capacity.

Become overstimulated. Do not try to think of 'clever' or embarrassing questions. Use your time positively, listening and structuring your thoughts.

Listen only to facts. Think also of the main ideas, concepts, structure and how the values, attitudes and prejudices of the speaker affect the presentation.

Expect the speaker to structure the talk to suit your needs. As you take notes, follow the speaker's approach, otherwise your structure will not fit in with the concepts and ideas presented. You can rearrange your notes later.

Remain passive. Listening is an active process, so stay alert.

Tolerate distractions. If you cannot hear the speaker, or if you are too hot or too cold, then say so.

Listen to only what you want to hear. Be willing to consider arguments and evidence which oppose your views. Be aware of your prejudices.

Evade difficult subjects. Face problems head on.

Waste your thinking potential. People normally talk at about 125 words per minute, but they listen and can think at about 400 words per minute. The differential of 275 words per minute is a breeding ground for day dreaming.

Do:

Run ahead of the speaker. What has been said? What might be said? What is this all leading to? What are the implications of this message? By asking yourself these questions you will improve your concentration.

Examine the evidence presented. Is it accurate, objective and complete? Is it strong or weak?

Recap every few minutes in order to avoid day dreaming.

Remember that listening is an active process and is therefore very hard work.

You have two ears and one mouth. Try to use them in roughly that proportion.

Observation

Sometimes the best way to find out is simply to observe. For example, you may be trying to find out how much traffic passes Anytown Primary School. According to your purpose you might need to break this figure down to the types of vehicle, specific days, and possibly to different times of year. The simplest way of recording your results is to use a series of tally sheets like the one illustrated in Figure 2.

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Traffic Passing Anytown Primary School (west – east)

Tally sheet no.:
Date:
Time:
Name of observer:

	No.	%
Cars		
Buses		
Lorries		
Vans		
Motor Bikes		
Other (specify)		
Total		

Fig. 2.
A tally sheet.

Interview

Interviewing is a skilled technique and few people do it well. While the interview should appear to be reasonably casual, it must be planned and structured. Follow these key steps:

Step 1 Greet the interviewee in a friendly manner. Avoid too much small talk and maintain a professional image.

Step 2 Explain the precise purpose of the interview. What do you want to find out? Let the interviewee know that his or her input will be valued.

Step 3 Ask your questions. Use open questions (who, what, when, why, where, how), and try to avoid yes/ no answers. Listen and show you understand. Then follow up with secondary questions. Give the interviewee time to answer. Cover one topic at a time; try not to 'hop about'. Empathise do not judge or be seen to take sides.

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Step 4   Sum up the interview to check your understanding of facts, opinions and circumstances.

Step 5   Thank the interviewee for his or her co-operation.

Letter

If you decide to ask for information by letter, remember to:

Name the person you are writing to and give his or her designation and organisation (for example, Miss V. Rich, Chief Finance Officer, Midshire County Council).

Give the letter a heading.

Explain the purpose of your report in the first paragraph.

Courteously ask for the information you require. Keep it concise but comprehensive.

If possible, draw a table where this information can be inserted.

Send the letter as early as possible and tactfully request a reply within two or three weeks.

Enclose a stamped addressed envelope.

Conclude the letter by thanking the person in anticipation.

Telephone Call

Sometimes you can obtain the information you need by making one or more telephone calls. However, this method is not recommended when the information is likely to be fairly complex and/or there are figures involved (for example, 'Did she say £4, £14, or £40?'). Telephone calls are most appropriate when you know the person and when your questions are straightforward (often requiring no more than yes/no answers).

If you do decide to telephone, write down the questions you want to ask and have a pen and a few sheets of paper handy. If you are using a public call box, make sure you have plenty of change with you. Then follow these key steps:

Step 1   Give your name ('Good morning, I'm. . .').

Step 2   Ask for the right person ('May I speak to. . .').

Step 3   Explain why you are telephoning. Emphasise that you are not selling anything! ('I'm phoning about a report I am preparing on. . .'.)

Step 4   Politely ask for the information you require. Let them know that their input will be appreciated ('I would be extremely grateful if you could help me on one or two points. . .').

Step 5   Thank the person by name.

Speak distinctly, deliberately and a little more slowly than you normally do. Make your voice pleasant, cheerful and positive. Keep the conversation short without ever being abrupt.

Questionnaire

This method of information gathering involves questioning a sample of people (respondents). Questionnaires seek two kinds of information:

Factual. For example, 'How often do you *buy* Product A?'

Opinion. For example, 'What do you *think* of Product A?'

Such a survey is necessary only if the information sought is not already available, or if the information is out of date. There are two important points to bear in mind when producing a questionnaire. First, you will need to approach members of the public and they have no obligation to assist you, so check that your questions (and your general approach) are courteous. Second, make sure that your questions are relevant to the subject of your report. Figure 3 is an example of a simple questionnaire to find out what schoolchildren think about their school meals.

Here is a checklist for a good questionnaire:

Does it have a title?

Does it have a reference or questionnaire number?

Does it record the name of the interviewer?

Is it well spaced?

Does it explain the purpose of the questionnaire?

School Meals Questionnaire

Questionnaire No.   Interviewer:

                                                     Date:

'I am carrying out a survey on school meals on behalf of Midshire County Council. I wonder whether you would be willing to answer a few questions?'

Ask the respondent

Q 1 Which class are you in?	Year 6	__
	Year 7	__
	Year 8	__
	Year 9	__
	Year 10	__
	Year 11	__
Q 2 Enter the sex of the respondent	Male	__
	Female	__
Q 3 How often do you have school meals?	Every day	__
	most days	__
	2 or 3 days per week	__
	Not often	__
	Never	__

If the answer is 'Every day', go straight to Q 5

Q 4 When you don't have a school dinner, what do you do instead?	Go home to dinner	__
	Buy dinner elsewhere	__
	Bring own food	__
	Have no dinner	__
	Other (specify)	__

Q 5 Do you think that school meals are:

Very good?	__
Quite good?	__
Average?	__
Bad?	__
Awful?	__

Thank respondent for helping

Fig. 3. A questionnaire.

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Where appropriate, does it emphasise that all replies will be treated confidentially?

Is it clear and unambiguous?

Is it simple?

Is it logically developed?

Does it ask one question at a time (not two or more questions at the same time)?

Does it require definite answers?

Does it avoid leading questions? (Ask: 'What do you think of product A?' *not*: 'Product A is fantastic. Do you agree?'.)

Does it avoid an appeal to vanity? (Ask: 'Do you take regular exercise?' *not*: 'Most fit people exercise regularly. Do you?'.)

Does it avoid an appeal to sympathy? (Ask: 'Should the Health Service be better funded?', *not*: 'People are dying needlessly. Should the National Health Service be better funded?'.)

Where appropriate, does it leave sensitive areas until last (for example, the age of middle-aged or elderly respondents)?

Is the questionnaire written in such a way that will make it straightforward to record and analyse your overall results?

Has the questionnaire been 'pilot tested' among a small number of respondents to highlight any obvious errors, omissions, ambiguities and other shortcomings before the survey goes live?

Once you have designed your questionnaire and amended it as necessary, you must decide on sampling methods. No strict rules can be laid down for sampling. The methods used will depend on the circumstances of the case, but unless the methods are random the reliability of the results is no more than a matter of opinion.

The following are three common sampling techniques:

Simple Random Sampling

This is a quick and simple method, by which every person or item has an equal chance of being selected. If you want to select 10 per cent of a population of 100, simply take ten names out of a hat containing the 100 names.

Systematic Random Sampling

Again, every person or item has an equal chance of being selected, but the choice is made to a prearranged plan (though it is still random). For example, select every 100th name on the electoral register.

Quota Sampling

This is used to get a balanced view from people in the street based on age, sex and possibly social class. For example, select twenty males, aged 1620; twenty males, 2125; twenty males, 2630; twenty females, 1620; twenty females, 2125; twenty females, 2630.

Finally, you should be aware of errors that can occur owing to bias in sampling or questioning. Here are some ways of avoiding bias:

In Sampling:

Do not deliberately select people or items. All selections must be random.

Do not substitute or replace items selected randomly. For example, if you decide to question somebody from every twentieth house, do not change to the twenty-first if you do not receive a reply at the twentieth. The house-holders may be at work and should not be excluded for this reason. Call at a different time or on a different day.

Do not deliberately omit items that should be selected randomly. If you need to select ten males, aged 1620, approach a random selection not, for instance, just young professionals.

In Questioning:

Do not vary the wording of your questions.

Do not ask leading questions.

Do not ask questions which appeal to vanity.

Do not ask questions which appeal to sympathy.

Accessing

As we have seen, it is possible to access an almost limitless amount of information, if you have an almost unlimited budget for reference CD-Roms and on-line services. However, plenty of useful information is available at realistically low prices.

Going On-Line

There are basically three levels of connection to the Internet. First, there are networks like *CompuServe* and *CompuLink* which provide gateways into the Internet. Costs are normally based on a monthly fee, plus a charge for connect time, surcharges for connection to some services and the cost of the telephone call to connect. In future, companies such as Microsoft seem certain to take a large share of this market.

Second, remote access via a Service Provider can be arranged. This is likely to be the most common route for the future. The service provider has a direct connection to the Internet and subscribers dial in to the service provider to connect remotely. This potentially is the most economical method as most service providers charge a monthly flat fee to which the telephone costs have to be added. As there are now many local connection points (points of presence) in the UK, telephone calls will probably be at local rates, although this will not be the case everywhere.

Third, it is possible to have a direct connection to the Internet. This is the option often chosen by academic institutions and major companies. It is very expensive because it is necessary to maintain computer equipment, with the associated staff costs, and generally be connected directly to the Internet 24 hours a day, 7 days a week, via expensive high speed leased lines.

Connecting to the Internet

A subscriber to an Internet service provider will need the following, as a minimum, in order to use the resources available.

A PC preferably at least a 486 machine running Windows. The purists will argue that running Internet software under UNIX or DOS gives better performance, but using Windows-based software allows the complete beginner to move up the 'learning curve' more

quickly by eliminating the necessity to remember complex commands.

A modem preferably the fastest that can be afforded (rated at least 14,400bps, but preferably 28,800bps).

Software which allows communication via the modem and use of the required transmission protocols. It will normally be supplied by the service provider and will be tailored to their particular implementation of Internet protocols. The software will dial up the nearest point of presence to log on, using a unique user identification and password, and establish a link with its computers which is connected directly to the Internet.

Client software to run on the PC to interact with server software at whatever site selected. It will include:

Electronic Mail software: to read and compose electronic mail. This is normally supplied by the service provider.

File Transfer Protocol (FTP): client software to allow connection to FTP servers and download files. This is often supplied by the service provider.

Usenet off-line newsreader: to allow downloading of Usenet messages and to read them when not connected. This is not strictly necessary, but if you use Usenet regularly it can cut down the amount of time spent on-line and thus reduce telephone connect charges. This is rarely supplied by the service provider, but good shareware and public domain software is available at many sites for downloading.

World Wide Web Browser: this will soon be the only item of application software required for use of the Internet. A graphical, multimedia Internet tool such as Netscape is rapidly becoming the standard for software provided to new users, allowing them to browse the documents used within the WWW.

It is advisable to read some specialist books on the subject. Three of the best are *The Internet for Dummies* by John Levine and Carol Baroudi (IDG Books Worldwide, 1994), *More Internet for Dummies* by John

Levine and Margaret Levine Young (IDG Books, 1994), and *The UK Internet Book* by Sue Schofield (Addison Wesley, 1995).

Recording Your Findings

Many organisations have their own formal systems for recording information. For example, report writers may be expected to produce working papers which may be reviewed before, during or after the production of a report. These papers may also need to be consulted if any statement in that report is challenged, or if some clarification is required. Some organisations will require files of background information, or planning information, or progress reports, or staff and other resource usage and costs, or documents required to generate data. So *ultimately* you must record your findings in the way your organisation prescribes.

However, you may have more freedom to choose the methods by which you record your findings *during* the investigation or project. There are many ways of doing this, and each person will prefer a particular method. Here we shall briefly examine two methods of note-taking:

traditional notes

patterned notes.

Traditional Notes

In this method of note-taking, material is condensed using headings and subheadings, and then emphasising the most important points or arguments. This method is also the basis of report writing.

When you make traditional notes, use loose-leaf paper, double spacing, write on one side of the paper only and leave generous margins. This will allow notes to be rearranged and added to when required. You must also decide the layout which suits you best, but remember that it must be as clear and comprehensive as possible. Here are a few suggestions:

Once you have chosen a layout, stick to it.

Use a consistent numbering system.

Use diagrams and illustrations as well as text.

Use abbreviations, but be clear, simple and consistent. For example:

Omit syllables	Expt (Experiment)
Abbreviate endings	Exptg (Experimenting)
Omit unnecessary words	the, a, an
Use initials	M.D. (Managing Director)

Also use recognised abbreviations like these:

e.g.	for example
cf.	compare
∴	therefore
bc	because
→	it follows
viz.	namely
i.e.	that is
no.	number
=	equals
w/	with
w/o	without
q.v.	see
p.	page
b/4	before
ref.	reference
etc.	etcetera

Patterned Notes

In his book *Use Your Head*, Tony Buzan describes an alternative type of note-taking which allows you to summarise your understanding and helps you find links between information and ideas.

You start your patterned notes in the centre of a page and your ideas spray out from it. The best way to illustrate this is to give an example. Suppose you were asked to produce a report on the sources of information available to the report writer. You might plan the report by using patterned notes to help you identify the relevant ideas, concepts and facts which you already know, and those you will need to find out. Your patterned notes could be built up until they look something like Figure 4.

There are some clear advantages in using patterned notes:

They let you see the whole picture.

They are very flexible (you can add to them).

They highlight links.

They remind you what you already know and what you will need to find out.

They are quicker to write.

They are quicker to read.

They help you plan your report.

Fig. 4.
Patterned notes.

However, they can become over elaborate and confusing. Also, they are not very suitable for displaying just facts rather than ideas, concepts and facts. So do not neglect traditional notes, but seriously consider using patterned notes as well.

Whichever method of note-taking you use, remember that good notes will always follow the '5C' rule they will be:

clear

concise

comprehensive

complete and

correct.

Sorting and Grouping Your Findings

If the report has been well-planned, this process will be quite straightforward. Use the headings and sub-headings of your skeletal framework and make sure you have gathered enough relevant information to complete each section and subsection. If you need more information, gather it now not once you have started to draft your report.

Evaluating Your Findings

There are two aspects to this evaluation:

How *reliable* are the findings?

How *significant* are the findings?

Consider each in turn.

How Reliable are the Findings?

There are four factors by which the reliability of information should be judged:

accuracy

objectivity

completeness

strength.

Accuracy

Sometimes you can check the data supplied. For example, are the mathematical calculations accurate? If there are too many to check, remember Pareto's principle which states that eighty per cent of what is important is represented by twenty per cent of what exists. Concentrate on this twenty per cent.

Information may also be inaccurate if it is out of date. In experimental work, was current equipment used? In legal matters, has account been taken of any recent and relevant legislation or case law? When text books have been consulted, were they the most recent editions?

Objectivity

When people have strongly held beliefs they will often see or hear things which support these beliefs, but they will not see or hear things which oppose them. For example, self-deception may cause results to be interpreted incorrectly. Going further, it is not unknown for people to perpetrate fraud, either to hoax or to provide 'evidence' to support preconceived ideas.

So ask yourself whether all the major or relevant points of view have been fairly represented. If the subject is controversial, the arguments for both (or all) cases should have been presented. At the very least, the person who provided the information should have made it clear that the views expressed are his or her own, and should then provide references to opposing viewpoints.

Finally, be very wary of statements without supporting evidence.

Completeness

In computer science a 'hash total' is used to ensure the completeness of a batch of records. However, it is often extremely difficult to prove that information is complete or, more accurately, that it is not incomplete. For example, we know of many animals that once inhabited the world. But how can we prove that they were the only ones? How can we prove that unicorns never existed? What you must ask yourself, therefore, is whether all relevant information has been provided and whether any attempt has been made to deceive or mislead by omission. Then look at it from the other side: is all the information provided relevant or is someone trying to 'blind you with science'?

Strength

Evidence is strong when:

It can be verified or re-performed (for example, a scientific experiment).

Independent observers have all come to the same conclusion.

There have been a large number of consistent observations.

It is in agreement with the general body of knowledge.

Conversely, evidence is weak when some or all of these conditions cannot be satisfied. Always differentiate between fact and opinion, and remember that the former provides the far stronger evidence.

How Significant are the Findings?

You must now step back and assess the implications of your findings. How material are they? Many report writers simply list every piece of information they have gathered without any consideration of its relative importance. This is a mistake because it implies that each is of equal weight. It is important to recognise that there will be a variety of interconnected causes for, and consequences of, an event and these will *not* be of equal importance.

Prioritising Your Findings

What you must do is to highlight your most significant findings, and be prepared to carefully explain why they are so important. You may find it useful to amend your skeletal framework so that these key findings will not get lost somewhere within the main body of the report or in an appendix. But don't overdo it: the more things you highlight in the main body and summary, the less powerful each so-called 'highlight' will become.

At the other extreme, ask yourself whether everything you have found is worth recording in the report. Perhaps some findings should merely be placed in an appendix as evidence of work undertaken or perhaps they should be omitted entirely. If your readers dismiss any of your findings as petty or irrelevant, this can undermine the entire report and severely damage your credibility.

As you prioritise your findings, continually remind yourself that your aim will be to tell your readers everything they need to know, but not to waste their time with trivia.

Checking Your Findings

Before you conclude your investigation or project, you must be sure that:

You have collected and handled all the information you will need to write the report.

You are satisfied that all this information is accurate and reliable.

It is far better to fill in any gaps in your research now or perhaps reperform an experiment, or refer to some further management statistics, or confirm your understanding of the way a system operates while you are still on site. Otherwise you may later have to rely on your memory, or on someone's uncorroborated evidence over the phone, or and worst of all trust to luck, before you can complete your draft report.

So ask yourself: Could I confidently write the report now, relying only on the information I have collected and handled? The investigation should not be wound up until the answer to this question is an unqualified 'Yes'.

Summary

While it is quite possible to write a bad report after completing a good investigation or project, it is *impossible* to write a good report until you have successfully identified, obtained, recorded, sorted and grouped, evaluated, prioritised and checked the right amount of relevant information.

Information Sources

There are four sources of information available to you:

people

books and other publications

information technology

events and places.

Obtaining Information

Information can be gathered from these sources by one or more of the following methods:

experimentation

reading

listening

observation

interview

letter

telephone call

questionnaire

accessing.

Recording Information

As you collect your information you should record it in traditional note form and/or in patterned notes. Whichever method(s) you use, your notes should follow the '5C' rule: they should be:

clear

concise

comprehensive

complete and

correct.

Sorting and Grouping Information

Do this under the headings and sub-headings of the skeletal framework. Make sure you have gathered enough relevant information to be able to complete each section and sub-section of the report.

Evaluating Information

Critically evaluate the evidence and arguments. Are they:

Accurate?

Objective?

Complete?

Strong?

How *significant* are your findings? Some will be far more important than others. As you review each finding ask yourself: So what?

< previous page   page_59   next page >

< previous page   page_59   next page >

Prioritising Information

Highlight your most significant findings but *only* your most significant findings. If necessary amend the skeletal framework to make your key findings prominent within the main body as well as in the summary. Use the rest of the main body and any appendixes to tell your readers everything they need to know, but do not bore them with trivia.

Checking Information

Before the project is completed, make one final check to ensure you have gathered enough accurate, reliable and relevant information to enable you to write the entire report.

3
Writing and Revising Your Report

If sufficient time and thought have been devoted to preparing and planning, and possibly revising, the skeletal framework, and to collecting and handling the information, you will now have a practical blueprint for the entire report. Writing will entail amplifying the points in each section and 'putting flesh on the bones'.

The highly subjective and mentally demanding process of effective written communication is the subject of Chapter 4. This chapter is concerned with the *clinical* process of ordering, classifying and sequencing. The order of writing and reviewing is important, and should be as follows:

Pre-write.

Draft the main body and appendixes.

Review the main body and appendixes.

Draft the conclusions, recommendations, introduction and summary.

Check and amend the report.

Issue the report.

Consider each stage in turn.

Pre-Writing

Take an overview of your report before you begin to draft it. There are three aspects to this (five if you are making recommendations), namely:

Targeting. Remember your readers. It is all too easy to write for yourself and not for them.

Outlining. Remember your purpose and objective(s). Make sure your outline (general plan) is just wide enough to encompass them no more and no less.

Structuring. Refer to your skeletal framework. Is it still the most suitable, or will it need to be revised, perhaps to highlight some particularly important finding?

Developing. What will you recommend to overcome problems identified?

Checking. Are you sure that these recommendations are practicable?

Drafting the Main Body and Appendixes

These components should be written first. Begin with the section or subsection of the main body, or with the appendix you feel most confident about. There are two important reasons for doing this:

For any writer there is little worse than the horror of facing that first blank page. By choosing to write what you find the easiest or most inviting, you avoid this initial trepidation by immediately getting down to writing.

The more difficult parts of a project seem less forbidding once the easier ones have been accomplished.

In the back of your mind you will be aware that this draft is likely to be amended. This is not a reason to treat it lightly. The better your first draft, the better your final draft will be. So write as if *this* is your final draft.

Reviewing the Main Body and Appendixes

Once you have written your detailed findings, try to forget about them for a while. Then come back with a fresh mind. Assess what you have *actually written* and how it *comes across*, rather than still thinking about what you had intended to write and get across. Put yourself in your readers' shoes and be highly self-critical. As you read and re-read your draft, you should:

Assess whether the sub-structure of the main body (logical, sectional or creative) is really the most suitable one to present your facts and arguments.

Examine the layout and general appearance.

Determine whether the tone and balance are correct.

Review the use and format of tabulations and appendixes.

Check the accuracy of figures and calculations.

Check the use of English, punctuation and spelling.

This self-assessment should give you a good idea of whether it is necessary to re-structure your framework and/or re-write any of the main body or appendixes, in order to get your message across as you had intended.

Drafting the Conclusions, Recommendations, Introduction and Summary

These sections should not be written until *after* the main body and appendixes have been completed, reviewed and, where necessary, re-drafted. Each of these sections can now be directly related to what has *actually* been written in the main body and appendixes. The first section can now be an accurate summary of the report. Another advantage of this approach is that it avoids the danger of writing the report twice: it is very easy for an introduction to develop into a report if the detailed findings have not been written first of all.

Most writers draft these sections in the order in which they appear above, namely:

conclusions

recommendations

introduction

summary.

Conclusions, Recommendations and Introduction

Your conclusions must follow logically from your detailed findings. Your recommendations must follow logically from your conclusions.

Your introduction should include everything your readers need to know before they read the rest of the report.

The Summary

While these sections are all important, you must pay particular attention to your summary. Make sure that the overall opinion is expressed accurately and unambiguously, and reflects the findings and comments given in the main body and appendixes. It must be a true summary of the report and should highlight any areas requiring a particular emphasis. As already stated, the summary should stimulate the readers' interest by outlining:

The salient facts.

The main conclusions and recommendations.

Remember that it is intended to serve two overall functions:

To provide a précis of what the recipient is going to read, or has just read.

To provide an outline of the report if the recipient is not going to read any more of the report.

A summary must be interesting; if a reader finds it boring, the report will have failed.

Checking and Amending the Report

Hold it two weeks is a classic rule in advertising. For the report writer this may not be practicable. However, once you have completed your first draft, try to forget all about it for a few days or at least a few hours. Then re-read it. Does it flow? Are there adequate links and signposts for the reader? Can you justify everything that you have written? Finally, ask yourself whether you would be willing to *say* what you have *written* to the recipients, face-to-face. If you would not be willing to say it, do not write it either.

Now send the draft to the typist, or print a copy of the document you have prepared on your word processor.

It is usual for three people to be involved in checking and amending this typed first draft:

yourself

a colleague

your line manager.

Your Check

Once again, read it very carefully. It is far easier to spot mistakes and other shortcomings on a typed or printed document than on a manuscript. Look out for any factual or typing errors, or instances of poor presentation, including unrequired or inconsistent:

variations in size or style of lettering

headings and sub-headings

numbering

highlighting techniques

margins and spacing.

Is every section, sub-section, paragraph, sentence and word really necessary? Are they accurate? Do they convey the meaning you intended?

A Colleague's Check

However, by now you will have read and re-read the draft so often that you may not be able to see the wood for the trees. So ask a sympathetic colleague, who knows as much about the subject as your readers but not much more to give his or her candid comments on the amended report. It is far easier to detect flaws in other people's writing than in your own. Are there any obvious errors or ambiguities? What changes or improvements would they suggest? What impact is it likely to have on your readers? You have been too closely involved with the report to assess this objectivity.

Your Line Manager's Check

Now pass the further amended report to your line manager. As well as asking the same sort of questions about it as you and your colleague did, your manager will probably be considering wider aspects of the report:

its technical content

its overall relevance

whether it is politically sensitive.

If the report was authorised by a senior officer, your line manager will be particularly concerned that it does credit to the section, firm or profession.

Managers often follow these steps as they appraise draft reports:

Assimilate. What is the report trying to achieve? How has the writer attempted to achieve this?

Question. Are all the facts, arguments, conclusions and recommendations accurate, complete, convincing and justified? Be prepared to face some very detailed questioning.

Evaluate. How significant are the findings?

Check. Will the writer need to provide any further evidence or re-assess the practicality of any recommendations?

Amend. Will the report need to be re-structured?

Edit. What changes will need to be made to the content or presentation? Are the most important findings, conclusions and recommendations given due prominence? Are less important findings confined to the main body, as appendix, or perhaps omitted?

Finalise. Is the report now written to the standard the recipients require, or, in an organisation with many levels of management, to the standard other senior levels require?

If everything is now considered satisfactory, the section and paragraph headings can be finalised, all paragraph and report references checked or amended, the pages numbered, the frontispiece drawn up and, if necessary, an index compiled.

You should be given the opportunity to discuss the reasons for any changes made by your line manager. If this does *not* happen:

You may feel that this is no more than unjustified criticism.

You will not learn from the experience as you can only guess what was wrong with your version.

You may conclude that there is no point in spending so much effort on subsequent reports if they are going to be re-written by superiors.

By now this draft will have so many comments and amendments on it that it will almost certainly need to be re-typed or re-printed. This is likely to be the final draft. After three drafts it is probable that the report will not get better anyway. Re-writing to get it right is an excellent practice; re-writing as a matter of course is a very bad and wasteful practice.

Preparing the Final Version

You should be responsible for preparing the final version. There are three reasons for this:

It will save your line manager's time.

It will show that you have grasped any points of criticism.

It will result in a report written in one style, rather than a patchwork from different hands.

Proofreading

When the typing is returned, or the final draft is printed, it must be proof-checked very carefully. What does this say?

<div align="center">

Paris
in the
the spring

</div>

And this?

<div align="center">

A
bird
in the
the hand

</div>

If you were proofreading, you would be expected to have spotted the extra 'the's.

However much time and effort are put into researching and writing the report, the required result will not be achieved without sufficient care being devoted to the process of proofreading. A poorly presented report, full of errors and inconsistencies in layout, has a damaging effect regardless of the quality of the content. Mistakes, therefore, must be identified and corrected; there really is no excuse for failing to do this properly.

Proofreading your own work is difficult and inefficient. Because you are so familiar with the report, you tend to race through and think of the bigger picture the next report. Someone else who has not been working on the report can give it much fresher and more objective scrutiny.

Here are some useful proofreading techniques:

Print out a copy of the report. Spell-checkers and grammar-checkers miss things, and people do not read text onscreen with the same diligence as they read from a page.

Use a ruler to slow down your reading and make yourself read line by line.

Read the report out aloud. This process slows down your reading and makes you listen to how it sounds.

Read the report backwards. Obviously it will not make sense but it is an excellent way to spot spelling mistakes.

Limit your proofreading to one small section at a time. Then take a short break before proceeding to the next small section.

Proofread when you are most fresh. This time may be early in the morning or whenever you feel the most alert.

Try to proofread when you know you will have peace and quiet and can avoid interruptions from the telephone or visitors.

Issuing the Report

In some organisations the report would now be issued. In others, the following final steps are taken:

Discussion. The writer discusses his or her findings with the key recipients and confirms the factual accuracy of significant points.

Clearing. Any corrective action is agreed and/or the report is amended in the light of any mistakes or misapprehensions shown to have occurred during the investigation.

Circulation. The revised report, clearly annotated 'Draft' on the cover and on every page, is circulated.

Agreeing. The findings are agreed.

Issuing. The final report is issued.

There are important advantages in following these additional steps:

It paves the way for the recommendations.

It prepares the recipients for any criticisms which may be in the final report.

It enables the writer to adapt the tone and emphasis of the report in the light of the recipients' initial reactions.

It increases the probability that the findings will be accepted if they have been fully discussed and the recipients' views have been taken into account.

It enables the writer to avoid errors and misunderstandings which would otherwise undermine his or her credibility and damage the department's or company's reputation.

The responsibility for final approval of the report often rests with the writer's line manager. Once this approval has been obtained arrange for, or make, the correct number of bound copies, including at least one for file. By publication day the names, addresses and designations of all the recipients should be known and checked. Envelopes, wrappers and labels should have been made up, covering letters or compliment slips prepared to explain why the report has been sent and to provide a contact point (probably you), if further enquiry or comment is desired.

Record full details of all issues in a register and try to ensure that each person receives his or her copy at the same time.

Summary

If sufficient time and thought have been devoted to preparing and planning, and possibly revising, a suitable skeletal framework, and to collecting and handling the information required, writing the report will be reasonably straightforward. You will need to amplify the points in each section of the framework, and 'put flesh on the bones'.

The order of writing and revising is important, and should be:

1. Pre-write (targeting, outlining, structuring, developing and checking).

2. Draft the main body and appendixes, beginning with a section, subsection or appendix you feel particularly confident about.

3. Review the main body and appendixes.

4. Draft the conclusions, recommendations, introduction and summary, in that order.

5. Check and amend the report: yourself, a colleague and your line manager.

6. Issue the report, possibly after discussing, clearing, circulating and agreeing a draft report.

PART 2

4
A Style Guide to Good Report Writing

Chapter 3 took a clinical view of report writing (the ordering, classifying and sequencing of a document). This chapter turns to the highly subjective and mentally demanding process of effective written communication, and considers that elusive concept known as style.

Style is the most nebulous area of report writing. It is very easy to criticise a writer's style as 'poor' or 'inappropriate'; what is not so easy is to specify the stylistic improvements that should be encouraged. This chapter attempts to do just that under these headings:

Report style.

Achieving a good style.

Principles for effective report writing.

Report Style

To be completely successful, a report which makes recommendations must ensure that the persons for whom the report is intended:

Read it without unnecessary delay.

Understand everything in it without undue effort.

Accept the facts, findings, conclusions and recommendations.

Decide to take the action recommended.

Achieving this demands more of you than merely presenting relevant facts accurately. It also demands that you communicate in a way that is both *acceptable* and *intelligible* to the readers.

Good Style

It is not possible to define precisely what good style is. Perhaps the nearest working definition is that good style is the best way to get your message across each time you write. Every situation on which a report is prepared will vary, at least slightly. If this were not so, there would be no need for the report to be written. The expression of every point must therefore be drafted with the new situation in mind. Orthodoxy and imitation (for their own sake) are the refuge of the bad report writer.

A good style in report writing involves constructing sentences and paragraphs in such a way that the message you wish to convey is conveyed accurately and quickly to the reader. This is far more difficult to achieve than many writers realise. Reports abound with sentences which their readers have to read two or three times before they can understand.

Once you have issued the report you have no opportunity, at the time the recipients read it, to explain, expand on, or modify what you have written. You cannot reinforce your message by non-verbal communication (as a speaker can by using gestures, facial expressions, intonations and so on). The readers get no further assistance from you: they have to work on their own to understand what you have said and to fathom your meaning. And, if the report is written in a bad style, the reader may get the wrong meaning, or perhaps no meaning at all. Your constant aim, therefore, should be to make the readers' task easier, and to ensure that what they understand when they read the report is what you *intended* them to understand.

The word 'style' is not used here as it is normally used in discussing literature as a term for appraising the quality of a writer's method of expression. A person may be well-educated and write in an excellent literary style, yet use a bad style in writing a report because he or she fails to *communicate* with the reader. A good style in business communication unlike a good literary style should combine:

clarity

conciseness

and directness.

In a report the style of writing should be *unobtrusive*; if the reader becomes aware of the style of writing it probably means that the writing is pompous, or ostentatious, or ambiguous, or difficult to follow. Above all else, the writing should be easy to read. Good style is good manners.

Research into what makes a piece of writing readable started in America about sixty years ago. Experts nowadays agree that the factors that most affect readability are:

an attractive appearance

non-technical subject matter

a clear and direct style

short sentences

short and familiar words.

Achieving a Good Style

Your style of dress is different on a beach, at a wedding and at work. Similarly, your style of writing should be different on a postcard, in a prepared wedding speech and in a report.

There are certain conventions within the field of report writing. For example, reports should always be serious (concerned with important matters) without ever becoming solemn (gloomy and sombre). However, a writer should be given as much freedom as possible within these conventions. This encourages the development of a natural, less inhibited writing style which, in turn, leads to better report writing.

There are numerous ways in which you can bring individuality to whatever you write, which will not only enable you to communicate more effectively, but also give your writing extra colour and impact.

Selectivity

Careful choice of words can enable you to convey many subtleties of meaning. You cannot find a word you have forgotten or do not know in a dictionary. Look up a word of similar meaning in a thesaurus and you will find a variety of words and expressions which should include the one in the back of your mind, or perhaps an even more appropriate one which you had not even considered.

Accuracy

Check that everything you write is factually accurate. The facts should be capable of being verified. Moreover, arguments should be soundly based and your reasoning should be logical. You should not write any-

thing that will misinform, mislead or unfairly persuade your readers. If you do, you will be doing a disservice not only to yourself but also to your department and organisation. Accurate information is essential for effective communication and decision making.

It is sometimes tempting to take short-cuts. If you are writing as a specialist for non-specialists you may feel that you can make statements which you would not make for a technical readership, in order to press a case. The danger with such an approach is that you only have to be found out once for your entire credibility to be destroyed, or at the very least undermined.

There is an old saying that liars must have good memories. In any case, it is much easier to write honestly and fairly. This makes for an enhanced personal reputation, and a growing confidence in the reliability of your findings, conclusions and recommendations.

Objectivity

A report should not be an essay reflecting personal emotions and opinions. You must look at all sides of a problem with an open mind before stating your conclusions. The role is similar to that of a sport's referee or a High Court judge. In these situations, decisions are based on the results, the evidence, or an interpretation of the evidence not on personal opinions and feelings.

Making it clear that you have an open mind when writing your report will, in most cases, make your conclusions and recommendations more acceptable to your readers. The emphasis, therefore, should be on the factual material presented and the conclusions drawn, rather than on any personal beliefs, biases or prejudices.

Conciseness

Veni, Vidi, Vici (I came, I saw, I conquered). That is how Julius Caesar reported his visit to our shores. While none of your reports will be as short as this, you should aim to keep them concise. In doing this, do not mistake brevity for conciseness. A report may be brief because it omits important information. A concise report, on the other hand, is short but still contains all the essential details.

To ensure you do not include material which can safely be left out, you should not ask: 'Can this information be included?' Rather, you should ask: 'Is it *necessary* for this information to be included?' In this way, you will be sure to put into your report only as much information as your readers need in order to respond as you wish them to.

Several software grammar-checkers aspire to provide general advice

on conciseness. These include Gunning's *Fog Index*, Flesch's *Reading Ease Score*, Fry's *Readability Graph* and Morris's *Clear River Test*. While they all have at least something to offer, they disregard such things as the use of actives and passives, the way the information is organised, how it looks on a page, and the reader's motivation and level of prior knowledge. They give only the merest hint about how to write better text and they encourage the idea that a clear document is one that scores well on a formula. Few serious writers bother to use them.

While it may be a truism, keeping the average length of sentences short is one of the best ways of ensuring conciseness. Aim for an average sentence length of less than twenty words. This does not mean, of course, that every sentence in a section must contain no more than twenty words. In fact, it is preferable to vary the lengths and constructions of sentences, otherwise your writing will have a staccato rhythm or a terseness which many readers may find either childish or otherwise irritating. (That sentence has thirty-four words.)

Clarity and Consistency

The best way to achieve clarity in your writing is to allow some time to elapse between the first draft and its revision. Try to leave it over the weekend, or at least overnight. If you are really under pressure and this is simply not possible, at least leave it over a lunch or coffee break. It is essential to have a period of time, no matter how small, when you can think of other things. In this way, when you come back to the report, you can look at it with a degree of objectivity.

You can, however, increase your chances of writing with clarity and consistency if, as you write, you try to keep certain things in mind. Concentrate on a mental picture of your readers, and make sure you are writing for them and not for yourself.

Simplicity

Usually, if your writing is selective, accurate, objective, concise, clear and consistent, it will also be as simple as it can be. You should guard against over-simplifying, for example to the point of missing out information which the reader needs to fully understand what you are trying to say. You should again keep your readers firmly in mind and keep asking yourself whether or not they will be able to follow the logic of your presentation.

Many problems in communicating are caused by making things more difficult than they need to be. Many writers also over-estimate the reading capacity of the report's recipients. They forget, or do not know, that

the average manager has a reading speed of about 225 words per minute and comprehends only about seventy-five per cent of what is read. That is why the summary is so important. Even if recipients are going to read the whole report, the summary tells them the essential points being made. It is always easier for readers to process information when they have some knowledge of it in advance. Remember the adage: tell them what you are going to say, then say it, then tell them what you said.

Keeping Technical Writing Simple

The problem of how to keep things simple is particularly acute for technical writers. The information they have to convey is difficult for nontechnical readers to understand. If they simplify their expression too much they may distort the meaning of whatever they are trying to say. It is all too easy for them to shrug their shoulders and tell themselves that it is not their fault and their readers will just have to follow them the best they can.

This simply will not do. The readers, after all, are the really important people. If they do not understand, they will reject what the writer has to say. If the writer depends on their approval for a course of action, he or she is helping no one by refusing to take their limitations into account. No writer can afford to be so self-indulgent.

Benefits of Simplicity

The rewards of writing simply are considerable. Readers will at least *understand* what has been said and will be more likely to respond favourably to conclusions drawn and recommendations made. They will form a higher opinion of the writer and they will read subsequent reports with greater attention and enthusiasm. These are achievements not to be undervalued.

Avoiding Sexist Language

The tone of your writing should not reflect any gender bias or any other type of bias, such as race, religion, age or disability. Such writing can send a wrong or hidden message and may alienate readers. While an awareness of the need to avoid sexual discrimination in writing goes back decades, it was in the 1980s that acceptance of this need became widespread. Impetus was given by the increase in the number of women in the workplace and today many schools and colleges teach non-sexist writing.

The use of pronouns in a sentence where the gender of the noun has not been revealed is often perceived as sexist, whether intentional or not.

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For example, if you use personal pronouns referring to a manager as 'he' and a secretary as 'she', you are stereotyping. You can avoid this by omitting pronouns, changing to plural form when possible, or by using pronouns from both genders.

not A good manager will gain the respect of his staff.
but A good manager will gain the respect of staff.

not A secretary should be loyal to her boss.
but Secretaries should be loyal to their bosses.

not A report writer should get to know his readers.
but A report writer should get to know his or her readers.

Various words and expressions can also be perceived as indicating a gender bias. With a little thought, it is possible to use more acceptable alternatives.

not policeman, *but* police officer
not fireman, *but* fire fighter
not businessman, *but* businessperson
not single mother, *but* lone parent

However, it is not easy to prepare a long report which is entirely gender-neutral. To do so tends to produce immoderately long sentences, excessive use of the passive and, sometimes, ambiguous writing. Also, it seems reasonable that where there is an overwhelming majority of one sex in the report's readership, the use of pronouns should reflect this.

Principles for Effective Report Writing

There are several well-known and well-tested pieces of advice to people who wish to communicate effectively on paper. Here are some that should prove particularly valuable to report writers.

The Importance of Reports

The report is the major product of your project or investigation. Indeed, for most people it is the only tangible evidence that any work has been undertaken. It should not be silent on all your hard work. There is as much importance in presenting facts as in finding them; what is not reported will soon be forgotten, and might as well never have been discovered.

Drafting the Report

Try to write your draft report over consecutive days. You will find that in two days you will achieve three times what you can in one; in four days you will do four times what you might in two.

Write in bursts of about forty minutes to an hour, each followed by a short break.

Never start a writing session without being clear what you intend to achieve.

Be flexible. You may have to postpone a writing session to do some other work. However, flexibility works both ways, so make the most of any unexpected writing opportunities.

A ten-minute solo walk can often be more useful than an hour sitting at your desk.

Once you have started, keep the momentum going. Do not be over-concerned with writing conventions at this stage. There will be time for this later.

Read a passage aloud to yourself. If it sounds like the latest news from Moscow, or staccato or complicated, you are failing.

The Need for Explanation

Always begin by saying what you have been asked to do, who asked you and when. Say how, where and when you have done it, and with whose help. Always explain what you are talking about. Never be afraid of explaining too much.

Try to consolidate highly factual reference into self-contained sections which will be seen as help for those who require it, but not as required reading for those who do not.

Always make it clear what you have accepted, and what you have verified. When you have verified something, say how.

You cannot explain the present without first explaining the past. Begin at the beginning. How do things come to be where they are now?

Be specific. Words like 'mostly', 'largely' and 'substantially' merely raise the question 'how much?'. Say instead 'three-quarters', 'two-thirds', 'about half'; there is no need to be finicky, but you must say what you mean.

Differentiating between Important Facts and Details

The best report writers are those who know which are the main facts, and which are the details and examples that illustrate them. If you did not fully understand that sentence, please read it again. It is possibly the most important there is in this book.

Avoiding Too Many Figures

A common mistake in writing reports is to produce too many figures and too few explanations. The principles to follow are two-fold:

Restrict figures to those which are meaningful.

Make sure they are consistently produced and interpreted.

Never assume that the readers will draw the right conclusion from the figures. They may quite easily not be reading them at all when they read the text; or they may read them and make the wrong conclusion; or they may fail to make any conclusion. Always say in words what they mean.

Layout

Be consistent:

Do not change names or descriptions without good reason. For example, if you describe a unit in the main body as 'the manufacturing department', do not refer to it as 'the factory' in the summary.

Write dates the same way throughout (6th December 1998, or perhaps December 6, 1998).

The numbers one to ten look better in words, larger numbers look better in figures.

The layout of headings, pages and paragraphs should not vary.

Keep cross-references to a minimum. Wherever possible exhaust a topic the first time it comes up. If something does have to be mentioned in two places, give the reference to the first discussion the second time you deal with it, not vice-versa. To be told that something is going to come up again casts doubt on what you have just read. Cross-reference to part and section numbers, not to pages or paragraphs; the parts of the draft report already revised can then be typed in final form before the later parts are finished.

Summary

Style is an elusive concept. Perhaps the nearest we can get to a working definition is that good style is the best way to get your message across each time you write. Your aim should be to write reports which are:

read without unnecessary delay

understood without undue effort

accepted and, where appropriate, acted upon.

Research has suggested that the factors that most affect readability are:

An attractive appearance.

Non-technical subject-matter.

A clear and direct style.

Short sentences.

Short, familiar words.

There are numerous ways in which you can bring individuality to

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whatever you write, which will not only enable you to communicate more effectively, but also give your writing extra colour and impact. It should be selective, accurate, objective, concise, clear, consistent and simple.

A report is an important document.

Draft it in short, concentrated bursts.

Pay particular attention to the need for explanation.

Differentiate between important facts and details.

Avoid too many figures.

Be consistent throughout.

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5
The Use of English

In report writing accuracy and precision are essential. Your writing must be concise, unambiguous and authoritative and yet be attractive to read. If it is not, this will reflect badly on you. At best your reports will be vague and misleading; at worst they will be confusing and inaccurate. You do not need to have a detailed knowledge of the correct use of English, but you do need to know the basic rules.

This chapter considers the importance of accurate and precise

grammar

punctuation

spelling

vocabulary.

Grammar

Writers often look at their work and have an uneasy feeling that it is not quite right, but do not know why. Understanding the basic rules of grammar helps identify the malady and its root cause. The cure then presents itself. Here are some rules that may be of help to you:

Rule	Example
Tense and Person	
1. Reports are normally written in the simple past tense. What you must decide is whether it should be in the first or third person; the first person is personal, the third is impersonal. If the report is written in the first person, you must then decide whether	First person singular: I recommend . . . First person plural: We recommend . . . Third person: It is recommended . . .

Rule	Example

it will be singular or plural. For internal reports the first person singular is often used. For external reports it is often the first person plural. Ask yourself how you would address the reader verbally. If it is informal, use 'I,'; if it is slightly more formal, use "We"; if it is very formal, use 'It'.

Paragraph construction

1. A paragraph should read as complete in itself.

2. Its sentences should vary in length.

3. It should begin with a topic sentence.

   The main reason why people want to work is to earn money.

4. The remainder of the paragraph should 'fill out' the topic sentence.

5. The paragraph should contain only information relevant to the topic sentence.

6. The final sentence should sum up that paragraph and link with the next.

   While financial incentive provides strong motivation, it is not the only reason why people want to work.

Sentence construction

1. A sentence is a set of words complete in itself as an expression of thought.

Rule	Example
2. Generally, keep sentences as short and simple as possible. However, their length and complexity should be varied to maintain interest.	Jesus wept. (John, 11:35)
3. Every sentence should have one main assertion. The normal construction is subject verb object (or complement).	The woman reviewed the report.
4. Words should be in a logical order.	The report will be issued next week. *not* Issuing the report will take place next week.
5. Generally, prefer the active voice to the passive voice.	Stephen wrote the report. *is better than* The report was written by Stephen.
6. However, if you want to say something is being done, passive is more natural.	The audit will be started next week.
7. Also, passive is better when the result is more important than the action.	The report has been typed.
8. Use the passive voice where the doer is obvious or unknown.	The office was robbed during the early hours of Monday morning.
9. The passive is also useful to avoid the continual repetition of I/we.	It was discovered that . . .

Rule	Example
10. Use the passive voice when writing up an experiment.	A glass stopper was weighed . . .
11. The first and last words of a sentence get more attention than those in the middle.	Effective report writing requires a systematic approach, as most people appreciate. *is stronger than* Effective report writing, as most people know, requires a systematic approach.
12. The word order can change the emphasis or meaning of a sentence.	She reads only on Fridays. Means she does not read on any other day. She only reads on Fridays. Means she does nothing but read on Fridays.
13. Always remember the subject of the sentence.	The report highlights several weaknesses in managerial control. The situation has not improved since the last audit. *is better than* The report highlights several weaknesses in managerial control and has not improved since the last audit. This says the report (the subject) has not improved.

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Rule	Example

Phrases and clauses

1. Avoid unnecessary phrases and clauses.

   Use Obviously
   not It is obvious that.

2. Do not overwork qualifications. A positive sentence is easier to read.

   Most of the errors had been corrected but two have not been.
   is better than
   While most of the errors had been corrected, two had not been.

3. Where phrases are used, they should follow the subject. A qualifying phrase can be removed without ruining the sentence.

   Stephen, who works in the accounts department, wrote the report.

Numbers

1. Use words for numbers up to ten.

   The report assesses four proposals.

2. Use figures for numbers over ten.

   The company has 614 employees.

3. Use figures in a listing which contains both large and small numbers.

   The committee consists of 4 men and 16 women.

4. Spell it out if the number is the first word of a sentence.

   Eighty-one complaints were received.

5. Use figures to express sums of money.

   £5,000,000 or £5 million.

6. Use figures to record chapter and page numbers.

   Chapter 2, page 53.

Rule	Example
7. Use to express, decimals, percentages, dimensions, weights and temperatures.	5.9, 28%, 16cm x 23cm, 4 kilos, 15°C.
8. Use words to express numbers that are approximate.	The petition contained about two thousand signatures. *but* The petition contained 2016 signatures.
9. Use figures to represent time.	14.00 hrs or 2.00pm.

Punctuation

The purpose of punctuation is simply to make it easier for the reader to understand the text. A good way to check your punctuation is to read aloud. Whenever you pause or change the inflexion in your voice, you should use some form of punctuation mark. But which? The answer obviously is important. If you use the wrong one, or put it in the wrong place, you can give a sentence a meaning which you did not intend. Consider the following eight words when punctuated in different ways:

'The man said the woman was a fool.'
The man said, 'The woman was a fool.'
'The man', said the woman, 'was a fool.'

The first statement gives the *reported* speech of the *man*; the second gives the *actual* speech of the *man*; the third gives the *actual* speech of the *woman*.

The following basic rules will help you decide which punctuation marks you should use, and where you should use them:

Rule	Example
1. Use a capital letter to start the first word of a sentence. Also use the for	John Smith; London;

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Rule	Example
people's names, place names and titles. Many report writers also use capitals for indexes and section headings. Problems occur in headings which are a mixture of capitals and lower case letters, but the basic rule is to use capitals for the first letter of each word which is not either a preposition or a conjunction.	Lord High Chancellor; Department of Energy; 'Absenteeism at ABC Limited, 19921997'.
2. Use a full stop (.) to end a sentence. Also use them after each letter which represents a word in an abbreviation.	E.F.C., European Forestry Commission (three words). Nat. Hist., Natural History (two words). km., kilometre (one word).
3. Use a comma (,) to separate three or more items.	We considered glass, plastic, polythene and polystyrene.
4. Use a comma to represent a pause in a sentence.	The report, which was written by Stephen, will be issued next week.
5. Use a comma to differentiate between clauses that define and those that (comment)	Mr Jones who was elected chairman comment. takes over from Mr Smith on Tuesday. (definition) Mr Jones, who was elected chairman takes over from Mr Smith on Tuesday.

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Rule	Example
6. Use a semi-colon (;) instead of a full stop to join 'sentences' which have some bearing on each other.	England won the World Cup in 1966; Geoff Hurst scored three goals in the final.
7. Use a semi-colon to mark off phrases (especially lists) in which a comma already appears.	The men worked in fields; the women, in the factory; the children, in the school.
8. Use a colon (:) to represent 'that is to say' or 'namely'.	There are many sources of information: people, places, events, publications, information technology and the media.
9. Use a colon to introduce an explanatory statement.	This is our decision: to accept the offer and sell the factory.
10. Use a colon to introduce a quotation where a comma already appears in the sentence.	Referring to her notes, she said: 'I visited the office on 16 September.'
11. Uses dashes () instead of brackets to indicate parenthesis. Dashes are stronger than a pair of commas but weaker than brackets.	The athletes there were ten of them all completed the race.
12. Use a dash to indicate an additional thought.	Brown came to this month's meeting it was the first he had attended since April.

Rule	Example
13. Use a dash where a word is repeated, together with an explanation or with elaboration.	We need to win the match today and to win it by at least three goals.
14. Use an apostrophe (') to shorten a word. Place it above the space created by the removal of the letter. Such contractions are not usual in formal writing.	is not isn't do not don't
15. Use apostrophes to indicate possession. If the word requiring the apostrophe is singular, place it before the 's'; if it is plural, place it after the 's'.	Britain's voters (the voters of Britain). Teachers' unions (unions of teachers).
16. Do not use apostrophes with possessive pronouns or where they are otherwise not required.	Hers *not* her's Giros *not* giro's
17. Use inverted commas (". . .") immediately before and after a direct quotation.	As Wellington said, "publish and be damned".
18. Use double and single inverted commas where there is a quotation within a quotation.	He said: "As Ford remarked, 'you can have any colour so long as it's black.'"
19. Use inverted commas where a word is used 'oddly'.	A semi-colon can be used to join 'sentences' together. Inverted commas are used because they are no longer separate sentences.

Rule	Example
20. Do not use inverted commas when stating facts.	Everest is the highest mountain in the world. This statement does not require inverted commas.
21. Use a question mark (?) at the end of a sentence containing a query.	That is quite straight-forward, isn't it?
22. Use an exclamation mark (!) to suggest a sudden change of emotion. Use them sparingly.	You must be joking!
23. Use brackets to enclose explanatory words.	Report writers must be aware of the main principles of law of libel (defamation published in a permanent form).

Spelling

To many people, incorrect spelling indicates carelessness and lack of attention to detail. This impression must be avoided. You should therefore have a good dictionary and always refer to it if you are unsure about a word's spelling, or about its precise meaning and usage. No spelling checker will ever identify every misused or confused word. You need to establish the correct spelling from the context.

English is derived from a number of different sources Norman French, Anglo-Saxon, Greek, Latin, Norse with Arab, Indian, African and other influences. So the rules of much of English spelling are not easy or consistent. However, here are some general ones that should help:

Rule	Example
1. Be careful not to omit part of a word	Accidentally *not* accidently.

Rule	Example
2. Do not join up two separate words.	In fact, *not* infact.
3. 'I' before 'e', except after 'c'.	Field, yield, receive. However, be wary of some weird exceptions: neither, either, leisure.
4. The prefix 'dis' is not hyphenated.	Discontinue *not* dis-continue.
5. The prefix 'sub' is not normally hyphenated.	Subeditor *not* sub-editor.
6. The prefix 'un' is normally not hyphenated.	Uncertified *not* un-certified.
7. To form the plural of words ending in 'y': If there is a consonant immediately before the 'y' in the singular, then the plural is 'ies'.	Lady ladies.
If there is a vowel immediately before the 'y' in the singular, then the plural is 'ys'.	Valley valleys.
8. Pay particular attention to words which are pronounced the same, or very similarly, but are spelt differently.	There and their To, too and two

No book other than a dictionary can hope to cover every word which is likely to cause difficulty; different words cause problems for different people. However, here is a list of the words which are most commonly misspelt by report writers:

Commonly Misspelled Words

abbreviate	accommodate, accommodation
absorb, absorption	accumulate
accelerate	achieve, achievement
accidentally	acknowledge, acknowledgement

acoustic	clientele
acquaintance	colour
acquire, acquisition	commensurate
across	commission
address, addressee	commit, committed, committee,
adequate	commitment
advertise, advertisement	comparative, comparatively
aggravate	complete, completely
aggression	concede
agree, agreeable	conceive, conceivable
align, alignment	conscientious
allege, allegedly	conscious
all right	consensus
allot, allotted, allotment	consummate
aluminium	controversy
analyse, analysis (singular)	courtesy
analyses (plural)	curriculum vitae (singular)
anonymous	curricula vitae (plural)
anxious, anxiety	
apparent	deceive, deceit
appear, appearance	decide, decision
appreciate	defence, defensive

appropriate

argue, arguing, argument

atmosphere

attach, attached

auxiliary

awful, awfully

basically

beautiful, beautifully

believe, believable

benefit, benefited

breath (noun)

breathe (verb)

careful, carefully

centre

chaotic

character, characteristically

chauffeur

defer, deferment, deferred

definite, definitely

descend, descendant

desperate, desperately

detach, detached

deteriorate

develop, developed,

development

diary, diaries

diesel

disappear, disappearance

disappoint, disappointment

disaster, disastrous

discipline

dissatisfied

disservice

dissolve

dissuade

doubt

eight

embarrass, embarrassment

exaggerate

exhilarating

existence

facilitate, facilitating

faithful, faithfully

favourite

feasible

focus, focusing

forbade

foreign

fortieth

fourteenth

fourth

fuel, fuelling

fulfil, fulfilling, fulfilment

gauge

grief, grievous, grievance

guarantee

independent

indispensable

install, instalment

intercede

irregular, irregularity

irrelevant

issuing

itinerary

jeopardy

knowledge, knowledgeable

language

leisure

liaise, liaison

likelihood

livelihood

maintain, maintenance

manoeuvre

miscellaneous

guide, guidance

half, halves

harass

height

hereditary

honour, honorary

humour, humorous

hygiene

hypocrisy

identical, identically

idiosyncrasy

illegal, illegally

illiterate, illiteracy

imaginary

immediate, immediately

inadequate

incidentally

misspell

necessary

nineteenth

ninetieth

ninth

noticeable

nuclear

occasion, occur, occurred

occurrence

opportunity

parallel

parliament, parliamentary

peculiar, peculiarity

permit, permitted, permission

permissible

persistent

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phenomenon (singular)

phenomena (plural)

physical, physically

pleasant, pleasure

possess, possession

prejudice

primary, primarily

privilege

proceed, procedure

profession, professional

professionally

proffer

program (computer)

programme (intended proceedings)

pronunciation

questionnaire

queue

radically

receive, receipt

recommend, recommendation

separate, separation

service, serviceable

similar, similarity, similarly

sincere, sincerely, sincerity

skill, skilful, skilfully

solicitor

special, speciality

speak (verb)

speech (noun)

statistics, statistically

stoically

straight, straighten

success, successful, successfully

sudden, suddenness

superintend, superintendent

supersede

supervise, supervisor

surprise

surveillance

susceptible

syllabus

synchronize

recuperate

refer, referring, reference

regret, regretted

relevant

renege

retrieve

rhetorical

rhythm

ridicule, ridiculous

routine

scarce, scarcity, scarcely

sceptic, sceptical

schedule

cience, scientific, scientifically

scissors

secretary

seize

synthetic

tariff

technique, technical, technically

temporary, temporarily

tendency

tomorrow

traffic

travelled

truth, truly, truthfully

typical

underrate

unmistakable

unnatural

unnecessary

vacuum

valuable	visit, visitor
various, variety	weigh, weight
vehicle	wilful, wilfully
view	wise, wisely, wisdom
vigorous	withhold

Vocabulary

When children are learning English at school they are encouraged to use long words in complex sentences. Paradoxically, the report writer should be encouraged to do just the opposite. Generally, prefer short words in short sentences: the right word, however modest, is never undignified.

Keep It Simple

Write to express, not to impress.

not   The return of this report after your review is requested.

but   Please return this review after you have reviewed it.

Keep It in a Logical Order

Avoid twisted sequences.

not   Delivery to the customer of goods and services is to be accomplished in April.

but   Goods and services are to be delivered to the customer in April.

Avoid Overwriting and Padding

Weed out any meaningless, excess words.

not Accounts Receivable is not concerned with the follow-up of any of the items with the exception of delinquent accounts.

but Accounts Receivable follows up delinquent accounts only.

Avoid Pointless Words

Some words and phrases keep cropping up in reports. Yet they rarely add anything to the message and often can be removed without changing the meaning or the tone. Try leaving them out of your writing. You will find your sentences survive, succeed, and may even flourish without them.

absolutely	abundantly	actually
all things being equal	as a matter of fact	as far as I am concerned
a total of	at the end of the day	at this moment in time
basically	current	currently
during the period from	each and every one	existing

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extremely	I am of the opinion that	in due course
in other words	in the end	in the final analysis
in this connection	in total	in view of the fact that
it should be understood	I would like to say	I would like to take this opportunity to
last but not least	obviously	of course
other things being equal	quite	really
really quite	regarding the (noun), it was	the fact of the matter is
the month(s) of	to all intents and purposes	very

Avoid Redundant Words

Repetition of a word can keep the reader aware of the topic. However, saying the same thing twice, in different words, for no good reason, is tautology.

not   The totally unanimous view was that past experience suggests our future prospects are bright.

but   The unanimous view was that experience suggests our prospects are bright.

Avoid the Careless Positioning of Words

This can cause misunderstanding and confusion.

not   The headmaster was urged to take a strong line on absenteeism by the board of governors.

but   The board of governors urged the headmaster to take a strong line on absenteeism.

Do not Give Transitional Words Undue Emphasis

Place them inside the sentence so they do not usurp the place of strength.

not   An adjustment was made last year. However, the correcting entry exceeded . . .

but   An adjustment was made last year. The correcting entry, however, exceeded . . .

Prefer the Positive

Try to use positive statements wherever possible.

not   We do not believe the backup files are adequate.

but   We believe the backup files are inadequate.

Place the Emphasis at the End of a Sentence

The strength of a sentence is at its end.

not With a little clarification, the subcontractor would have solved the difficulties occasioned by the specification changes more readily.

but With a little clarification, the subcontractor would more readily have solved the difficulties occasioned by the specification changes.

Try to Avoid Qualifying Introductions

Readers, seeing a qualification, are put on notice that they must keep this in mind until they read the rest of the sentence. This irritates.

not While repayment of these amounts is provided for, the ten per cent interest is not included.

but Repayment of these amounts is provided for, but the ten per cent interest is not included.

Use Words that Act

Use live, active verbs. Verbs translated into nouns make hard reading. Nouns should be visual: books, vans, invoices. Verbs turned into abstract nouns are, by definition, not visual and are therefore hard to grasp: reconciliation, subsidisation, verification.

not   The elimination of field bonuses could be accomplished.

but   Field bonuses could be eliminated.

Use Plain English

Do not be afraid of plain English. Carefully used, it will reveal your competence far better than the wooden style of so many report writers. Prefer words your readers are likely to understand.

not The ready availability of computer-based tutorials associated with applications software has become prevalent since the development of Microsoft Windows.

but Computer-based tutorials associated with applications software have become readily available since the development of Microsoft Windows.

If you find yourself about to write a word that you would not use in everyday conversation, look it up in the A-Z that follows. The overuse of the words in the left-hand column of the table will make your report

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seem pompous, officious and long-winded. Not that you should never use them, but judicious use of the alternatives will make your report shorter, simpler and more conversational in style. The alternatives are not always synonyms, so use them with proper care for meaning and for the job they have to do in the sentence.

A

absence of	no, none
abundance	enough, plenty, a lot (or say how many)
accede to	grant, allow, agree
accelerate	speed up, faster
accentuate	stress
accommodation	where you live, home
accompanying	with
accomplish	do, finish
(in) accordance with	because of, under, as
(is in) accordance with	agrees with, follows
accordingly	so
according to our records	our records show
acknowledge	thank you for
acquaint yourself	find out
acquiesce	agree
additional	extra, more
adjacent	next to
adjustment	change
admissible	allowed

advantageous	useful, helpful
advise	tell, say (unless you are giving advice)
afford an opportunity	let, allow
afforded	given
aggregate	total
a large number of	many, most (or say how many)
aligned	lined up, in line
alleviate	ease, reduce
allocate	give, divide, share
along the lines of	like, as in
alternative	choice, other
alternatively	or
ameliorate	improve, help
amendment	change

anticipate	expect
a percentage of	some (or say what percentage)
apparent	clear, plain, obvious, seeming
application	use
appreciable	large, great
apprise	inform, tell
appropriate	proper, right, suitable
appropriate to	applies to, suitable for
approximate	about, roughly
as a consequence of	because
ascertain	find out
assemble	build, gather, put together
assistance	help
at an early date	soon (or say when)
attempt	try
attend	come to, go to, be at
at the moment	now (or edit out)
at the present time	now (or edit out)
attributable to	due to, because of
authorise	allow
authority	right, power, may

B

belated	late
beneficial	helpful, useful
bestow	give, award
by means of	by

C

calculate	work out, decide
cease	finish, stop, end
circumvent	get round, avoid, skirt, circle
clarification	an explanation, help
combine	mix, together
commence	start, begin
communicate	talk, write, telephone (be specific)
competent	able, can
complete	fill in, finish
completion	end
comply with	keep to, meet
component	part

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comprises	made up of
compulsory	must
conceal	hide
concerning	about, on
conclusion	end
concur	agree
condition	rule
consequently	so
considerable	great, important
constitutes	makes up, forms, is
consult	talk to, meet, ask
consumption	amount used
contemplate	think about
contrary to	against, despite, different
correct (verb)	put right
correspond	write
costs the sum of	costs
counter	against
courteous	polite
cumulative	add up, added up
currently	now (or edit out)
customary	usual, normal

D

deduct	take off, take away
deem to be	treat as
defer	put off, delay
deficiency	lack of
delete	cross out
demonstrate	show, prove
denote	show
depict	show
designate	point out, show, name
desire	wish, want
despatch	send, post
despite the fact that	though, although
determine	decide, work out
detrimental	harmful, damaging
difficulties	problems
diminish	drop, lessen, reduce
disburse	pay, pay out

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disclose	tell, show
disconnect	cut off, unplug
discontinue	stop, end
discrete	separate
discuss	talk about
disseminate	spread
documentation	papers, documents
domiciled in	living in
dominant	main
due to the fact that	because, as
duration	time, life
during which time	while
dwelling	home
E	
economical	cheap, good value
eligible	can, allowed
elucidate	explain
emphasise	stress
enable	allow, can
enclosed	inside, with
encounter (verb)	meet
endeavour	try

enquire	ask
enquiry	question
ensure	make sure
entitlement	right
envisage	expect, imagine
equivalent	equal, the same
erroneous	wrong
establish	show, find out
evaluate	test, check
evince	show, prove
exceptionally	only when, in this case
excessive	too many, too much
exclude	leave out
excluding	apart from, except
exclusively	only
exempt from	free from
expedite	hurry, speed up
expeditiously	as soon as possible, quickly

expenditure	spending
expire	run out
extant	current, in force
extremity	limit

F

fabricate	make, make up
facilitate	help
factor	reason
failure to	if you do not
finalise	end, finish
following (in time)	after
for the duration of	during, while
for the purpose of	to, for
for the reason that	because
formulate	plan, devise
forthwith	now, at once
forward	send
frequently	often
furnish	give
furthermore	then, also, and
further to	after, following

G

generate	produce, give, make
give consideration to	consider, think about
H	
henceforth	from now on, from today
hereby	now (or edit out)
herein	here (or edit out)
heretofore	until now
herewith	now (or edit out)
hitherto	until now
hold in abeyance	wait, postpone
hope and trust	hope, trust (but not both)
I	
if and when	if, when (but not both)
illustrate	show, explain
immediately	at once, now

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implement	carry out, do
imply	suggest, hint at
in accordance with	as, under, because of
in addition to	and, as well as, also
in advance	before
in a number of cases	some (or say how many)
inappropriate	wrong, unsuitable
in case of	if
inception	start, beginning
in conjunction with	and, with
in connection with	for, about
in consequence	because, as
incurred	have to pay, owe
indicate	show, suggest
in excess of	more than
inform	tell
initially	at first
initiate	begin, start
in lieu of	instead of
in order that	so
in order to	to
in receipt of	get, have, receive

in relation to	about
in respect of	about, for
insert	put in
inspect	look at
inst. (abbreviation)	(give the month)
instances	cases
intend to	will
in the absence of	without
in the case of	in, for
in the course of	in, while, during
in the event of/that	if
in the majority of instances	most, mostly
in the near future	soon
in the neighbourhood of	about, around
intimate (verb)	say, hint
in view of the fact that	as, because
irrespective of	despite, even if
issue (verb)	give, send
it is apparent that	apparently, clearly

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J

jeopardise	risk, threaten

L

locality	place, area
locate	find, put

M

magnitude	size
(it is) mandatory	(you) must
manner	way
manufacture	make
marginal	small, slight
material	relevant
materialise	happen, occur
may in the future	may, might, could
merchandise	goods
mislay	lose
modification	change
moreover	and, also, as well

N

necessitate	have to, need to, must
negligible	very small
nevertheless	but, however, even so

notify	tell, let us know
notwithstanding	even if, despite, still, yet
numerous	many (or say how many)

O

objective	aim, goal
(it is) obligatory	(you) must
obtain	get, receive
occasioned by	caused by, because of
on behalf of	for
on numerous occasions	often
on receipt	when we/you get
on request	if you ask
on the grounds that	because
on the occasion that	when, if
operate	work, run

optimum	best, ideal
option	choice
ordinarily	normally, usually
otherwise	or
outstanding	unpaid
owing to	because
P	
partially	partly
participate	join in, take part
particulars	details, facts
per annum	a year
perform	do
permissible	allowed
permit	let, allow
personnel	people
persons	people, anyone
peruse	read carefully, look at
place (verb)	put
possess	have, own
possessions	belongings
practically	almost, nearly
predominant	main

prescribed	set, fixed
preserve	keep
previous	earlier, before, last
principal	main
prior to	before
proceed	go
procure	get, obtain
profusion of	plenty, too many (or say how many)
prohibit	ban, stop
prolonged	long
promptly	quickly, at once
proportion	part
provide	give
provided that	if, as long as
provisions	rules, terms
prox. (abbreviation)	(give the month)
proximity	close, closeness, near
purchase	buy
pursuant	under, because of

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Q

qualify for	can get, be able to get

R

(on) receipt	when we/you get it
receive	get
reconsider	think again, look again
reduce	cut
reduction	cut
referred to as	is called
refers to	talks about, mentions
regarding	about, on
regulation	rule
reimburse	repay, pay back
reiterate	repeat, restate
relating to	about
remain	stay
remainder	the rest, what is left
remittance	payment
remuneration	pay, wages, salary
render	send, make, give
represents	shows, stands for, is
request	ask, question

(on) request	if you ask
require	need
requirements	needs, wants, rules
reside	live
residence	home, where you live
(have a) responsibility to	must
restriction	limit
retain	keep
reverse	back
revised	new, changed
S	
said/such/same	the, this, that
scrutinise	read carefully
select	choose
settle	pay
similarly	also
solely	only
specified	given, written, set

state	say, tell us, write down
statutory	legal, by law
subject to	depending on, under, keeping to
subject to compliance with	under
submit	send, give
subsequently	later
subsequent to/upon	after
substantial	large, great, a lot of
sufficient	enough
supplementary	extra, more
supplement	go with, add to
T	
terminate	stop, end
that being the case	if so
the question as to whether	whether
thereafter	then, afterwards
thus	so, therefore
timeously	on time, in good time
to date	so far, up to now
to the extent that	if, when
transfer	change, move
transmit	send

U

ult. (abbreviation)	(give the month)
ultimately	in the end at last
unavailability	lack of
undersigned	I, we
undertake	agree, promise, do
uniform	same
unilateral	one-sided, one-way
unoccupied	empty
until such time	until
utilise, utilisation	use

V

variation	change
virtually	almost (or edit out)
visualise	see, predict

W

ways and means	ways

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we have pleasure in	we are glad to
whensoever	when
whereas	but
whether or not	whether
whilst	while
with a view to	to, so
with reference to	about
with regard to	about, for
with respect to	about, for
with the minimum of delay	quickly (or say when)

Y

you are requested to	please
your attention is drawn	please see, please note

Z

zero-rated	free, free of
zone	area, region

Use the Right Word

It is quite possible to confuse or misuse even the most common words (such as its and it's). Sometimes the results are comical, but they are never comic (see page 113):

'Over one hundred computers joined the train at Reading.'

However, the effects of such errors can be serious and are almost certain to undermine the writer's credibility. Accuracy and precision are essential: is the event held biannually or biennially? Subtlety of meaning is important too. A reader may welcome a recommendation but take offence at a suggestion.

Commonly Confused and Misused Words

abdicate | renounce formally

abrogate | to cancel (a law)

arrogate | to seize without right

abrupt | sudden

brusque | in a business-like manner

brisk | lively efficiency

abuse | to use something wrongly or badly

misuse | to use something for a purpose for which it was not intended

accept	to receive
except	to exclude
activate	to make active
actuate	to operate
acuity	sharpness of any of the five senses or the mind
acumen	mental sharpness
acute	sharp, sudden, dangerous
chronic	long lasting, continuing
adjacent	next to, but not necessarily touching
adjoining	touching
adventurous	seeking adventure
adventuresome	taking risks
venturesome	constantly taking risks
advise	to counsel (verb)
advice	opinion offered (noun)
aesthetic	appreciating what is beautiful
ascetic	believing that abstention is the best means of achieving an end
affect	to influence (verb)
effect	consequence (noun)

aggravate	to make worse
exacerbate	to increase harshness
exasperate	to irritate to the extreme
allocate	to assign to each their share
allot	to give a part of a whole (literally, 'that's your lot')
apportion	to divide and share in just proportion (eg, overheads)
allowed	permitted
aloud	capable of being heard
allude	to refer to indirectly
elude	to escape from
allusion	an indirect reference to an unnamed person or object
illusion	false, deceptive
alternately	one after the other
alternatively	one instead of the other

amend	to improve
emend	to correct
amiable	a friendly disposition
amicable	done with goodwill
announce	to say what is going to happen
proclaim	to announce widely
pronounce	to declare authoritatively
annual	happening once a year
perennial	recurrent
antagonist	an opponent
protagonist	the leading character in a play or novel
anti	against
ante	before
anticipate	regard as likely and act in advance
expect	regard as likely
apparently	seemingly
evidently	obviously
appraise	to judge
apprise	to notify

arbiter	one who has authority to judge
arbitrator	one called upon to judge
artist	one who shows skill or cleverness
artiste	one who shows skill or cleverness in a creative field
assault	to attack, usually with physical violence
assail	to attack violently with words
assent	to acquiesce, to not disagree
consent	to give positive agreement
assure	to give assurance
ensure	to make certain
insure	to protect against
astonished	a reaction to something unexpected or remarkable
astounded	unable to think, or act, or speak

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augury	any sign or indication
auspice	a good omen
aural	to do with the ear
oral	to do with the mouth
auspicious	the time is right for success in the future
propitious	the conditions are right for success now
authoritative	in a manner indicating authority
authoritarian	dictatorial
averse	disinclined toward
adverse	opposed to
avoid	to steer clear of (tax avoidance is lawful)
evade	to escape by cunning or trickery (tax evasion is unlawful)
barbarous	cruel and inhuman
barbaric	in bad taste, rude
belligerent	warlike
bellicose	actvely seeking or waging war
benevolent	wishing good for others
beneficent	doing good for others

biannual	happening twice a year
biennial	happening every other year
border	the area on the edge of a territory
boundary	the line marking the furthest extent reached by a territory
business	a firm
busyness	being busy
can	able to
may	permitted to
canvass	to seek votes or survey opinion
canvas	cloth
capability	being able in any way to do something
capacity	having the power to do something
ability	having the particular attribute to do something

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censor	to edit, cut or tone down
censure	to criticise severely
cheque	written order to bank
check	to test accuracy
childish	like a child, immature
childlike	having good qualities of a child, innocent
classic	of the highest order
classical	usually Roman or Greek classics
coherent	consistent and logical
cohesive	bound or united
cogent	convincing
collect	to gather together
collate	to arrange in the proper order
collusion	a secret agreement, often for fraudulent purposes
conniving	supporting a wrong-doing without actually participating in it
conspiring	agreeing to do something unlawful
comic	something intended to be funny
comical	something not intended to be funny but is
common	shared

mutual	(eg, feelings) felt by each towards the other
compared to	pointing out similarities
compared with	pointing out differences
complement	something that completes
compliment	to praise
complicated	difficult because of the several factors involved
complex	difficult because of an involved combination of factors
comprehensive	inclusive
comprehend	to understand
confidant(e)	someone in whom one confides
confident	sure
confined	kept within recognised limits
contained	prevented from breaking out from normal bounds

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consequent	following as a result or effect
subsequent	following
conserve	to guard against loss or damage
preserve	to keep something in good condition
consistently	to do something repeatedly in the same manner
persistently	to deliberately repeat an action
contemporary	living or happening at the same time
current	up-to-date
contemptible	deserving contempt
contemptuous	showing contempt
continuous	unceasing
continual	recurring frequently
contract	a formal agreement
compact	any agreement
contrary	opposed to or different from
converse	opposed to
co-operate	to act jointly
collaborate	to act jointly for a specific purpose

counsel	advice or to advise
council	an administrative body
credible	believable
creditable	deserving credit
credulous	gullible
cynical	disbelieving and disapproving
sceptical	doubtful
deceitful	deliberately misleading
deceptive	misleading, but not necessarily deceitfully
decisively	showing decision
decidedly	undeniably
defective	imperfect
deficient	faulty
definite	not vague
definitive	final or authoritative

delegate	to give a task to someone
relegate	to place in a lower position
delusion	deception caused by something actually being other than it seems
illusion	deception caused by something seeming to be other than it really is
allusion	an indirect reference
demonstrate	to show clearly
remonstrate	to protest
dependent	influenced by
dependant	a person who depends on someone or something
deplore	to regret deeply
deprecate	to express strong disapproval of
depreciate	to lower in value
derisive	something which shows mockery
derisory	something which deserves mockery
device	a machine
devise	to plan
diagnosis	identification of the root-cause of any problem
prognosis	prediction of future events by present signs
discrete	separate or distinct

discreet	circumspect
disinterested	impartial
uninterested	bored
distinct	clear
distinctive	characteristic of
doubtful	requiring more evidence to be convinced
dubious	having real uncertainty
draft	a plan or first attempt
draught	a mouthful
draw	to make a picture
drawer	part of a cupboard
dual	double
duel	a fight

due to	as a result of
owing to	because of
economic	relating to the economy
economical	thrifty
effective	having power to produce effects
efficient	having competent power to produce effects
elicit	to draw out
illicit	illegal or secret
eligible	fit to be chosen
illegible	cannot be read
emigrant	someone leaving the country
immigrant	someone coming into the country
migrant	someone who moves from one place to another
eminent	famous
immanent	inherent
imminent	liable to happen soon
emotional	affected by the emotions
emotive	affecting the emotions
enquire	to ask

inquire	to investigate
equable	pleasant
equitable	just
essential	indispensable
important	of great consequence
vital	necessary to life
exceptionable	disliked
exceptional	out of the ordinary
exhaustive	comprehensive
exhausted	tired out
extract	any passage quoted
excerpt	a specially chosen passage
faculty	the ability to do something
facility	the ability to do something with ease
faint	indistinct
feint	distracting movement

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farther	greater distance
further	additional
fewer	a lower number (eg, fewer employees)
less	a lower quantity (eg, less work)
forbear	refrain from, or an ancestor
forebear	an ancestor
forgone	went without
foregone	determined beforehand
formally	in accordance with rules
formerly	previously
fortunate	lucky
fortuitous	produced by chance
forward	in front
foreword	component of a report
here	opposite of there
hear	to listen to
historic	noted in history
historical	belonging to the past

immoral	having low morals
amoral	having no morals
immunity	free from something unpleasant (eg, a disease)
impunity	freedom from punishment
imply	to express indirectly
infer	to deduce
impractical	not able to put into practice, although theoretically possible
impracticable	not workable
inept	slow to learn
inapt	lacking skill
infringe	to violate
impinge	to make an impact
impugn	to question the truth
ingenious	very clever
ingenuous	naive

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instinctively	by instinct
intuitively	understanding instantly without the process of reasoning
it's	it is
its	belonging to it
knew	was aware of
new	novel or fresh
know	to be aware of
no	negative
later	more delayed
latter	second of two
led	went first
lead	a metal or to go first
licence	permission (noun)
license	to grant licence to (verb)
lightening	reducing in weight
lightning	the electrical phenomenon which accompanies thunder
lighting	equipment for producing lights
loath	reluctant
loathe	to find repugnant

lose	to misplace
loose	untied
luxuriant	abundant
luxurious	extremely comfortable
malevolent	wishing ill
malignant	wishing to cause harm
maybe	perhaps
may be	it may happen
meter	a machine for measuring
metre	100 centimetres
mistrust	suspicion
distrust	not believing

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moral	right or wrong conduct
morale	spirit
mortgagee	one who gives a mortgage (eg, a building society)
mortgagor	one who is given a mortgage (eg, a house buyer)
naturalist	one who studies natural history
naturist	a nudist
notable	worthy of notice
noticeable	discernable
numerous	of great number
innumerable	countless
obstinate	not yielding
obdurate	not easy to influence
of	belonging to
off	away from
official	authoritative
officious	fussily dutiful
oration	a formal speech
orison	a prayer

ordinal numbers	ones that state the order (first, second)
cardinal numbers	basic numbers (one, two)
ostentatiously	in a manner of pretentious display
ostensibly	on the face of it
particular	specific
peculiar	distinctive
partly	in part
partially	not fully
past	before
passed	to go by
perfunctory	casual
peremptory	dictatorial
personal	private
personnel	staff

phrase	a group of word, notes, etc
phase	a stage
piece	a section
peace	opposite of war
plain	not beautiful, or clear and obvious
plane	a smooth surface, or a carpenter's tool
practicable	capable of being able to put into practice
practical	sensible
practice	custom, or rehearsal (noun)
practise	to rehearse (verb)
precipitate	rash
precipitous	steep
presume	to suppose
assume	to take for granted
principle	rule
principal	chief
proceed	to go ahead
precede	to be ahead

prolific	producing abundantly
profligate	utterly immoral
prophecy	ability to foretell the future (noun)
prophesy	to foretell the future (verb)
proposal	a plan put forward for acceptance or rejection
proposition	an advantageous offer
proscribed	outlawed
prescribed	ordered
quote	to repeat someone else's words
cite	to quote or to name someone as an authority
rain	precipitation
rein	a lead for a horse
reign	to rule
recall	to remember, usually clearly
recollect	to recall with an effort
reminisce	to talk or write, usually fondly, of past times

reckless	irresponsible
feckless	ineffective
recommend	to advise
suggest	to propose
reconcile	to bring people together after they have disagreed
conciliate	to placate someone
refute	to prove to be in error
rebut	to refute by means of evidence or argument
rebuff	to check or snub
repeat	to do or say again
reiterate	to do or say again repeatedly
reproach	to charge with
reprove	to correct a fault
rebuke	to tell off
respectfully	in a respectful manner
respectively	one by one
retract	to withdraw
recant	to deny one's own words
review	to look over again

revue	a cabaret show
scarce	not plentiful
scant	barely sufficient
scanty	very small
sparse	thinly distributed
sceptic	unbelieving
septic	putrefying
site	location
sight	seeing
solid	reliable
stolid	impassive
staid	settled
sedate	calm and composed
specially	for a particular purpose
especially	exceptionally
stationary	not moving

stationery	writing materials
storey	a floor of a building
story	a tale
straight	without bends or honest
strait	narrow (geographical term)
surpass	to be better than
supersede	to take the place of
there	opposite of here
their	belonging to them
they're	they are
there's	there is
theirs	belonging to them
through	the way between
though	even if
thorough	in depth
to	towards, or, eg, to be
too	as well
two	1 + 1
torturous	winding

tortuous	painful
transitional	passing from one stage to another
transitory	lasting only a short time
transient	short-lived
waive	to not claim
wave	a sea swell
waste	misuse, or rubbish
waist	the middle
where	in what place
wear	to have on the body
whether	if
weather	climatic conditions
who's	who is
whose	belonging to whom
your	belonging to you
you're	you are

Prefer English to Foreign Words and Phrases

Using uncommon foreign-language terms may look like showing off. Avoid using them unless there are no good English equivalents and only if you are *sure* that your audience will understand them.

Foreign word or phrase	*English equivalent*
carte blanche	a free hand, freedom
ceteris paribus	other things being equal
circa	about
de minimis	trivialities, small amounts
en bloc	as a whole, together
ex officio	by virtue of the office held
ibid (ibidem)	in the same place, book etc
inter alia/alios	among other things/people
modus operandi	way of working, method
mutatis mutandis	with the necessary changes
op cit (opus citatum)	work quoted
per capita	per head, per person, each
per diem	per day, a day, daily
per se	as such, by or in itself, essentially
pro forma	a form
seriatim	one at a time, in the same order
sic	thus! (drawing notice to error)
sine die	indefinitely
vis-à-vis	as regards, regarding, on, about

viz (videlicet)   namely

Use Warm Words

Words are powerful. They conjure up images, evoke emotions and trigger responses deep within us so that we react, often without knowing why. So-called *warm* words make us feel secure and comfortable, while cold words leave us uneasy and unsure. Writer Henry James said the two most beautiful words in the English language are *summer afternoon* because they evoke just the right emotions.

In the early days of instant coffee, advertisers got off to a bad start by stressing words like *quick, time-saving* and *efficient*. These are all words without warmth and feeling. Makers of fresh coffee fought back with warm, happy, appetising words like *aroma, fresh* and *tasty*. Makers of instant coffee soon learned the lesson and their product became *delicious, rich* and *satisfying*. Sales *blossomed*. The rest, as they say, is history.

Once you get into the habit of looking at the emotional colouring of

words, as well as their meanings, you will find yourself using the kind of language that puts readers at ease and encourages them to react more favourably to your reports and to you.

Summary

You cannot express yourself accurately and precisely without knowing and applying the basic rules of grammar and punctuation. Whenever possible choose short, familiar words. However, always use language that conveys the precise meaning you wish to convey and don't forget to check your spelling.

Here are twenty statements, each of which is itself a demonstration of the fault it describes:

First and foremost, avoid clichés like the plague.

A verb have to agree with its subject.

There is no excuse for incorect spelling.

Avoid abstract nouns, in truth they are not readily understood.

Never use no double negatives.

It makes sense not to use the same words in two senses in the same sentence.

It is pathetic and criminal to use emotive language.

Place pronouns as close as possible, especially in long sentences, to their antecedents.

"Avoid overuse of 'quotation marks'."

Avoid all un-necessary hyphens.

Use commas only, when necessary.

Do not overuse exclamation marks!!!

Don't use contractions in formal writing.

Always avoid all awkward and affected alliteration.

Avoid using the same words over and over and over again.

Verily it is incumbent upon you to avoid ensamples of archaic words.

Avoid mixed metaphors; with enough time on your hands you should never end up with egg on your face.

Having drafted the report, all dangling principles must be deleted.

Make sure you never a word out.

Le mot de la fin: do not use foreign words or phrases if there are good English equivalent words or phrases.

6

Improving the Presentation of Your Report

Technology provides new, exciting and better ways of improving the presentation of a report. A computer equipped with word processing or desktop publishing software not only makes the work easier but also provides the opportunity for you to create a report every bit as polished and professional as one produced by an expert team including a writer, typist, typesetter and graphic artist.

The differences between word processing and desktop publishing (DTP) are fading. Word processing can be used to design documents. Desktop publishing can be used for ordinary, simple documents as well as highly sophisticated publications. Today, the two areas overlap extensively and are frequently used interchangeably.

The objectives of good presentation are:

To attract and retain the interest of the readers.

To help them understand the contents of the report without undue effort.

To enable them to find their way around the report quickly.

To demonstrate your professionalism and, where appropriate, that of your department and/or your organisation.

Word processing or desktop publishing software can help you achieve these objectives. Unless you are using a steam-driven PC, you will have a Windows environment which allows you to work *wysiwyg*. Pronounced *whizzywig*, this acronym stands for *what you see is what you get*. In other words, what you see onscreen is an accurate representation of how the document you are working on will print out. This means you can adjust the appearance of your report, making revisions to the look, until you are completely happy with the result.

This chapter provides a guide to determining the appearance of your report. It begins with an overview of what word processing and desktop publishing can do for the report writer. Then it considers how this new technology can be used most effectively to enhance each of the four elements which collectively create a high quality, professional-looking report, namely:

layout and design

typography

visual illustrations

colour.

Finally, it looks at other ways of making a report stand out from the pack, through careful choice of paper, covers, binding and indexing.

Let us begin with the overview.

Word Processing and Desktop Publishing

Flexibility is the key attribute of word processing and desktop publishing. Once you have got your text onscreen, you can edit it, format it, save your work as a file and print it out. Whole blocks of text can be inserted or deleted in the middle of a report with everything else moving around to accommodate the change. Paragraphs can be shifted from one section of a report to another. Sentences can be amended. Words can be highlighted. In short, you can do pretty much what you like with it.

As well as providing basic tools for drawing line rules, boxes and other embellishments, most word processors allow graphics and tabular information to be imported from other programs including accounts packages and spreadsheets that can prepare charts and tables from the data they hold.

If you have standard reports that need to be revised each time they are used, you can create them as templates, then personalise copies just before they are printed without the need to retype from scratch or take the unprofessional-looking route of typing or writing onto a photocopied standard report. Facilities for numbering pages and providing headers and footers should be found in most word processors, which can reduce the level of tedious work in producing reports.

On the design front, you can expect style functions that allow you to

save the attributes of text font, size, colour and so on as a style you can apply easily to sections of text you highlight using the mouse. This facility helps to keep consistency both within a report and between reports. You can change the fonts that you use in a report at will, providing you have installed fonts under the Windows operating system.

You may wish to consider add-on packages in order to improve the more popular word processing software. Task-specific programs that help you structure, say, a marketing plan can help you and your word processor enter into new fields by providing the examples and expertise needed to create detailed and competent reports.

There are numerous business-specific applications that are designed to address particular sectors of commerce or industry, which are referred to as 'vertical' applications. Some can be applied generally, such as Computer Aided Design (CAD) packages, but many are only relevant to one field estate agency, insurance or the like. Buying programs of this nature is a complex subject, as your own requirements may in reality be quite different from someone working in a different area of the same profession. If you are looking for a solution of this kind, then you should get in contact with your professional body or institute, which will maintain a list of recognised software suppliers. It will sometimes be able to make specific recommendations as to which package will be best for you, but more likely will leave the research side up to you.

Checklist: Word Processing and Desktop Publishing

Don't worry about your typing speed. Most two-finger typists can type faster than they think, and with practice your speed will improve.

Unless you are a graphic designer or have a real need to produce documents for professional printing, you are unlikely to need the facilities of high-end DTP, such as *QuarkXPress* and *Page Maker*. Start by mastering a word processor, and then move on to a basic DTP package such as *Publisher* or *Page Pro*.

Talk to other people who use word processors and see how they use the features their program offers.

Consider setting up a 'house-style' to use in your report, keeping the number of fonts to a minimum but using standard, attractive layouts. A set of templates can then be used as the starting point for all your reports.

Develop a filing system on your computer so you can easily find and reload reports. If you are dealing with a large number of reports, check that your word processor can search by summary information or the content of a report, rather than just the filename under which reports have been saved.

Layout and Design

Many considerations and decisions are required when choosing your overall layout and design. In particular, you will need to think about:

format

page size and orientation

margins and spacing

headings and subheadings

numbering.

Format

Reports of today do not have to look like the traditional reports of yesterday. They can *look* interesting and make people *want* to read them. Word processing and desktop publishing techniques can be used to create new, reader-friendly reports in exciting formats such as modern, ultra-modern and enhanced modern. Reports of today do not have to look like reports.

A traditional report is the kind produced on a typewriter. A modern report takes this format one stage further by adding lines and boxes, changing font sizes and using italics. An ultra-modern report has the additional feature of a two- or three-column format. People read faster and comprehend more information when reading short rather than long lines of text. In an enhanced modern report, images are added and manipulated. This is an excellent format for reports because people are used to reading newspapers, journals and magazines presented in this way.

Figure 5 illustrates three designs which offer possible starting points for creating your own page layouts.

< previous page   page_130   next page >

Fig. 5.
Three page designs.

< previous page   page_130   next page >
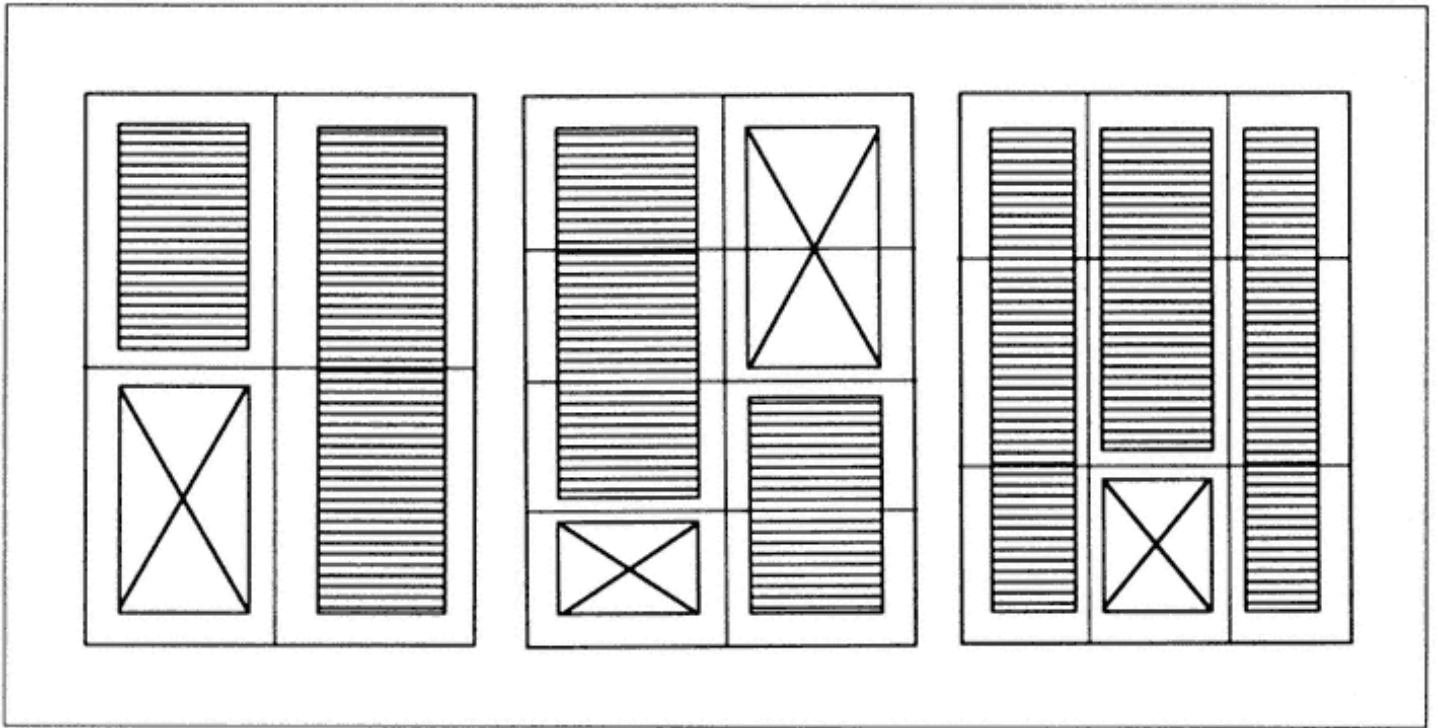
Throughout the remainder of this chapter you will find everything you need to know to be able to create a professional report in any format. If you choose a traditional single-column layout, it is advisable to use 12-point type. A variation to this is to use just one column but to shorten the line length. This not only makes the material easier and faster to read, but also allows space for artwork, graphics, captions, headings and subheadings. The use of two- or even three-column formats gives a report a very professional look and increases the readability of copy. Smaller 9-, 10-, or 11-type size is recommended.

Page Size and Orientation

What size of paper will you use? The standard pages are these:

Paper size	mm	inches
A1	594 x 841	23.4 x 33.1
A2	420 x 594	16.5 x 23.4
A3	297 x 420	11.7 x 16.5
A4	210 x 297	8.3 x 11.7
A5	148 x 210	5.8 x 8.3

Writers tend to choose standard A4 paper as a matter of course. However, at least consider other options. If you are using a photocopier or laser printer, make sure the paper you choose will go through your machine.

In addition to size of paper, you will need to consider its orientation (see Figure 6). Will the report be portrait (vertical/tall) or landscape (horizontal/wide)? Most reports are portrait. Perhaps a landscape orientation might work even more effectively.

Portrait   Landscape
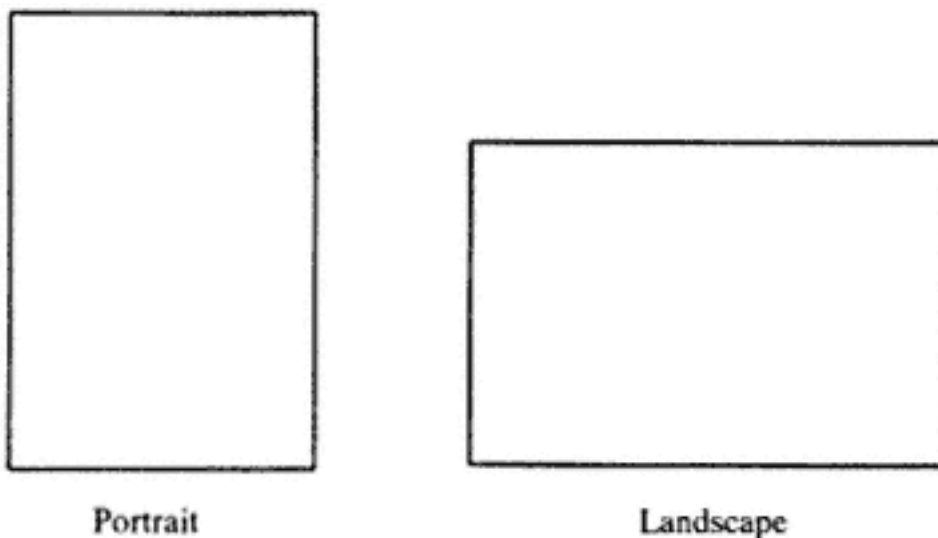
Fig. 6.
Page orientation.

Margins and Spacing

It is far easier for a reader to assimilate information presented in small sections than in huge, uninterrupted blocks of print. Pages with too much type and artwork give the appearance of being too heavy and hard to read. White space (or whatever colour background is used) is very important not only to help the reader, but also to give the report a professional look. It is important to allow:

Adequate space between the lines of print (reports are often double-spaced with 1 1/2-spacing for sub-paragraphs).

An adequate and consistent margin on the left of the page for binding (the size of margin on the left will vary according to the type of binding selected).

Clear and consistent gaps between sections and paragraphs.

A margin of at least an inch at the top (the header zone) and bottom (the footer zone) of the page.

Using bulleted lists of related items (such as the one above) is another good way of breaking up paragraphs of text to make it easier to read. The list may be introduced by a colon, a dash, or both (:-), and the size of any indentations must be consistent.

Headings and Subheadings

Headings and subheadings help busy readers of today by identifying and labelling blocks of type. They are not standard. You must invent them. Make sure that they:

are comparatively short

are descriptive

would be expected, or at least would be easily interpreted

cover all the ground (collectively)

do not overlap (although the same information may appear under more than one heading if it supports more than one argument)

are never vague (for example, avoid headings such as 'General', 'Miscellaneous' and 'Other')

are in an order which readers will find logical (perhaps in alphabetical order, in chronological order, or in order of importance)

are identical to those listed in the table of contents (if used).

Once you have introduced a topic with a heading or subheading, you cannot leave that topic and move on to another one until you provide another heading or subheading. For this reason subheadings should not repeat information provided in headings. For example, if your heading is 'ABC Limited', your subheadings could be 'Production Department', 'Accounts Department' and 'Personnel Department'. There is no need to write, 'ABC Limited Production Department'.

Remember that the title of the report should be more prominent than section headings; section headings more prominent than paragraph headings; paragraph headings more prominent than sub-paragraph headings, and so on. Similarly, headings of the same rank should represent topics of roughly equal importance. Paradoxically, though, the less prominent the heading, the more specific and precise must be the wording below it. Think of it this way. You are driving from London to South Wales. As you approach the motorway you see a large sign giving fairly general directions: 'Wales and the West'. As you cross the Severn Bridge you face a smaller sign providing more detailed information: 'Newport', 'Cardiff', 'Swansea'. As you leave the motorway at Newport you observe an even smaller sign giving quite detailed information: 'Industrial Estate'; 'The Docks'; 'Town Centre'. As you enter the industrial estate you see a very small sign giving details of every individual store: 'B&Q'; 'Comet'; 'Tesco'.

The principle applies equally to reports: the more prominent the heading, the less specific the text; the less prominent the heading, the more specific the text.

It is better to structure the report with several short sections, each containing a few subheadings, than to have just a few sections, each with several subheadings, sub-subheadings or even sub-sub-subheadings.

Numbering

The role of numbering systems is simply to identify the various components of a report for reference and indexing purposes. There are two aspects to this:

numbering pages

numbering sections and paragraphs.

Pages

Any time you have more than one or two pages, you need to number them. Computer software has the capability of performing this function automatically, but you must determine where you want the page numbers. Several choices are acceptable either the upper or lower outside corners or the middle of the bottom of the page. Placing the numbers on the outside corners allows readers to locate a specific page more easily when scanning through a report.

You can number the pages by following one of two methods. Either simply number the pages from 1 to n (n representing the final page number), beginning with the page *after* the title page. Or number the 'preliminaries' (the components *before* the main body) as (i), (ii), (iii), etc again beginning with the page *after* the title page, and number the remainder of the report from 1 to n.

Sections and Paragraphs

When it comes to numbering sections and paragraphs, it is very important to keep the system simple. For many writers the numbering seems to be an end in itself; and sometimes it appears that it determines the structure rather than vice versa. Here are some possible methods:

(i) Combination of Roman and Arabic Numbers

Popular throughout continental Europe, and used in all European Commission reports, Roman numerals identify sections and Arabic numerals identify related text. The breakdown is extended by decimals, if required. For example, the third section of a report could be numbered as follows:

III

    III.1

        III.1.1

        III.1.2

        III.1.3

    III.2

        III.2.1

        III.2.2

(ii) Sections with Unique Sequential Paragraph Numbers

Here Arabic numbers are used to identify sections, letters are used for subheadings and Roman numerals for sub-subheadings. For example:

5(a)i

5(a)ii

5(b)i

5(b)ii

5(b)iii

(iii) Simple Decimal Numbers

This method uses a two- or three-decimal numbering system, combined with Roman numerals to identify paragraphs within subsections or sub-subsections:

4.

4.1

4.1.1

4.1.2

(a)

(b)

4.1.3

(iv) All-Decimal System

However, the most popular scheme of numbering is the all-decimal system. There is no provision for any symbols other than decimal combinations. Reports numbered in this way are clear and unambiguous, but they can easily become extremely cumbersome:

1.1.1.1

1.1.1.2

1.2.1.1

1.2.1.2

1.2.2.1

1.2.2.2

1.2.2.3

By numbering paragraphs rather than headings or subheadings, you can avoid the complexity of three-part (1.1.1), four-part (1.1.1.1), or even five-part (1.1.1.1.1) numbering.

If your organisation has no standard numbering system for use in all

its reports (it should have one), ask yourself what system would make things as easy as possible for your readers. Look at earlier reports. What numbering systems did they employ? Which of them worked best? Would it work equally well for this report? Always remember that a numbering system should be determined by the structure of the report, not vice versa.

Checklist: Layout and Design

Keep paragraphs fairly short (generally five to eight lines) particularly when using two or three-column layouts.

Break up text by using the technique of listing (enumerating) with bullet, checkmark, arrow, or some other interesting character.

Make your page breaks so that you avoid widow or orphan lines one line stranded from the rest of the paragraph.

Avoid mixed or uneven columns, which result in a lack of visual continuity. Stick to one column grid for each page.

Aim for a minimum of 30 per cent and an average 50 per cent white space on each page.

Typography

Typography is the art and style of printing. Today users have at their disposal literally thousands of typefaces (specific type designs) and fonts (sets of characters in one weight and style of typeface) from which to choose. The choice of type is important because it will set the psychological mood and style of a report and create an impression of formality or informality. Be selective, and, if appropriate, consider taking advice from a designer who could help you develop a departmental or corporate identity that works for your business.

But more likely, *you* will choose the type for your report. Three elements must be considered:

kinds of type

size of type

type alignment.

Kinds of Type

Type can be classified into many different categories. One category is *serif* or *sans serif*. Serif is the French word for tails and it refers to the small cross strokes or flares at the end of a letter's main stems. Even though sans serif (meaning without tails) provides a cleaner, simpler look, some people believe that a serif type is more distinguished as well as easier to read.

Serif

Sans Serif

Typeface refers to a specific type design. Limit your selection to just one or two typefaces in any particular report.

Bodoni Black

Arial Narrow

Courier New

A type family includes all the variations of a basic design in every weight and point size. These variations are also called typestyle and include:

Plain

Bold

Italics

Bold Italics

Underline

< previous page   page_137   next page >

Page 138

Fonts are complete sets of characters (the alphabet, numbers and symbols) in one weight and style of typeface. Here are *Gill Sans Light (regular)* and *Univers Condensed (bold)*:

AaBbCcDdEeFfGgHhIiJjKkLlMmNnOoPpQq
RrSsTtUuVvWwXxYyZz0123456789!"#$%

**AaBbCcDdEeFfGgHhIiJjKkLlMmNnOoPpQqRrSs
TtUuVvWwXxYyZz0123456789!"#$%&shifted()*+,**

Sizes of Type

Type is measured by using the language of printer-points and picas. A point (1/72 of an inch) is the smallest typographical unit of measurement. A pica is approximately 12 points or 1/6 of an inch. On a computer, text can range in size from very small to very large.

4 6 8 9 10 12
16 18 20
36 42
72

The usual size for report text is 10 or 12-point.

Headings are normally made in bold to capture the reader's attention, and can vary in size to show the level of importance. As we have already seen, the more important the heading, the larger the letters. For this reason, a hierarchy of sizes and styles is needed for showing the various levels of headings and subheadings. The plan should be consistent and logical and progress from higher to lower levels in an obvious pattern. For instance, a heading could use an 18-point, bold font. A subheading could be reduced to 14-point bold. A sub-subheading could be 12-point bold italics. If a fourth level is needed, it could be an indented paragraph heading using italicized type the size of the text.

If you recall the analogy of the car journey from London to South Wales, under this hierarchy of sizes and styles, the signposts you encounter would have looked like this:

Heading:	**Wales and the West**
Subheading:	**Newport**
Sub-subheading:	***Industrial Estate***
Fourth level:	*B & Q*

Sometimes it is useful to draw attention to parts of the text by methods other than headings. The major ways of doing this are by:

Using upper case (capital) rather than lower case (small) letters.

Changing the spacing either before or after the emphasised word(s).

Indenting the words or text.

Bulleting the words or text.

Underlining the words or text.

Double striking or double spacing the text.

Using characters with different width (pitch).

Using different typefaces or fonts.

With any form of emphasis, it is important to be consistent and not to overdo it. The more things you emphasise, the less powerful each emphasis becomes. Also, when highlighting text, remember that:

USING UPPER-CASE LETTERS, SPECIALLY IN ITALICS AND IN AN UNFAMILIAR TYPEFACE, MAKES SENTENCES DIFFICULT TO READ AND COMPREHEND.

Using bold lower-case letters makes life much easier for the reader.

Type Alignment

Type alignment of left, centred, right or justified is possible either before or after the words are keyed into the computer. Justification, making both the left and right margins flush, gives a report a blocked look and is preferred by some report writers. However, research has shown that readability is improved if a ragged right margin is used. The uneven line endings provide a visual support for the eyes in addition to giving a more artistic look to the page. The choice is one for personal judgement (see Figure 7).
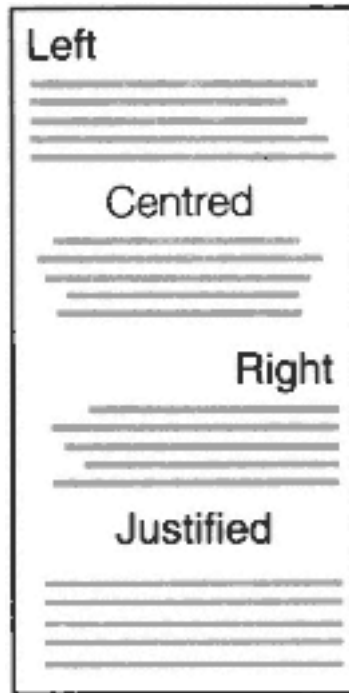
Fig. 7.
Type alignment.

Checklist: Typography

Use no more than two different fonts in any one document possibly a sans serif for headings and a serif for the body, or vice versa.

Experiment with different typestyles bold, italics, shadow, outline or a combination of these styles.

Prefer clear typefaces that invite the readers' attention.

Use italics rather than underlining the names of books or magazines.

Remember to vary font size for better reading.

Watch out for poor alignment. Keep everything neat and tidy.

Do not cram too much in. Space creates a light, readable quality.

Set up a house-style to use in your reports.

Visual Illustrations

Well produced and *appropriate* visual illustrations really enhance a report. They make the information readily understandable, easily digestible and memorable. It is much easier to assimilate information presented pictorially. Anything on a page other than text is either artwork or graphics. The word artwork refers to the *images* in the report, such as photographs, drawings and cartoons; graphics are *image enhancements*, such as lines, boxes and background tints.

When to Use Visual Illustrations

Visual illustrations are useful only when they are easier to understand than the words or figures they represent. Artwork and graphics should clarify, add to, illustrate, or enhance the document in some way. They should not be used without a specific reason or purpose. Otherwise, they will merely distract and confuse your readers. Ask yourself the 'so what? question: does every illustration have something to say within the overall context of the report? If there is no meaningful answer to 'so what?, then the illustration is worthless. If you have a positive answer to the question, then the illustration *should* be included.

Where to Use Visual Illustrations

The algorithm on page 26 will help you decide where the illustration should be placed. Ask yourself whether it would break the flow of the report or distract the reader. If the answer is 'no', place it in the main body of the report, after, and as close as possible to the point of reference. If the answer is 'yes', put it in an appendix.

Another good way to help you decide the placing of an illustration is to ask yourself whether it is fundamental to the arguments in the text,

or supplementary to them. If the reader *needs* to see an illustration in order to understand the text or if it is referred to several times it should be placed within the main body of the report. If the reader does not need to see it, it may be preferable to place it in an appendix, particularly if there are several other illustrations.

How to Use Visual Illustrations

Artwork can be inserted in your report in two ways by using either the traditional pasteup method or the electronic pasteup method. In the traditional pasteup method, you simply leave space for the art. Before reproducing the copy on a duplicating machine, you paste the artwork in place. In an electronic pasteup, you will have the entire document on disk and can make a copy or copies from the printer.

Computer images come in two types, vector and bitmap. Vector images are created from lines and shapes, each being mathematically described within the software. The advantage with vector images is that they can be manipulated by element and easily resized. Bitmap images describe a colour photograph type of image, when stored on a computer. While it is not possible to manipulate an element of an image as you can with vector, clever software offers smart tools which allow areas of a picture to be selected and transformed and smart filters, provided with the software, make it simple to experiment with hundreds of special effects.

Electronic art can come from a variety of sources and can be imported into your document from:

Drawings or diagrams created on the computer from a draw or paint program such as *CoralDRAW, CorelXara, Illustrator, FreeHand, Canvas* or *MacDraw*.

Artwork created by someone else and sold as clip art that you can copy and paste into your document.

Drawings or photos scanned into the computer using a special scanner such work may need to be modified or retouched using a computer program such as *Adobe PhotoShop*, Jasc's *Paintshop Pro* or *KPT Convolver*.

Graphs or charts created from a spreadsheet program such as *Excel, Lotus 1-2-3* or *Quatro Pro*. If you wanted a pie chart showing which product ranges make up which part of your business, or a bar chart showing turnover each month of the year, then a spreadsheet would allow you to produce these.

Standard camera film can be developed and printed in the normal way, but also written onto a CD-Rom in the form of high-resolution scans that can read straight into an image manipulation package on a PC. For an additional charge, *Kodak Photo CD* will provide this service.

Digital cameras that do not use film but save snaps as data can be downloaded directly to your hard disk.

Video can be captured as stills with a video capture card.

Once an image is captured, the effects you can apply are almost limitless; or they can be re-sized, edited, combined and retouched at will, before they are used in reports created by your word processing or DTP package.

The Choice of Visual Illustrations

Your aim is to include artwork which arouses readers' interest and helps them to a quicker and fuller understanding. Do not try to be clever. Use clear, simple, uncluttered and appropriate illustrations, concentrating on the essentials.

By also including some graphics lines, boxes, patterns and background tints you can make your report even more stimulating and appealing to readers. Uninterrupted blocks of text are daunting. Lines, boxes, frames and shading are useful in creating divisions (see Figure 8). Icons or symbols available in various fonts will help focus or direct the readers' attention. Logos provide a subtle way of marketing your company or providing a theme for a product or topic.

Ask yourself: What is the purpose of the illustration? Let us consider three of the most common answers to this question:

To give a general impression.

To show detailed information.

To show the structure and working of a system.

Illustrations which Give a General Impression

Three of the best ways of illustrating this are by the use of a:

pie chart

bar chart

pictogram.
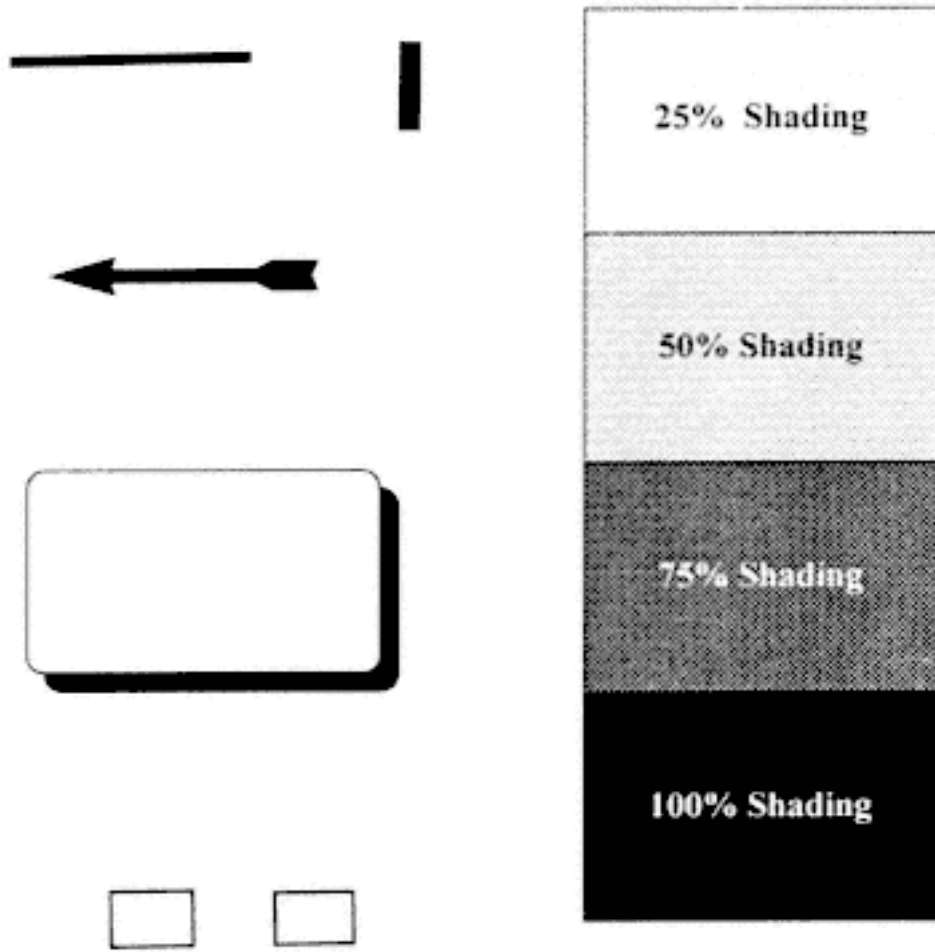
Fig. 8.
Lines, arrows, boxes, frames and shading.

Pie Charts

A pie chart is a circle divided by radii into sectors whose areas are proportional to the relative magnitudes or frequencies of a set of items. It is an excellent method of illustrating such relative proportions.

Here is an example. In 1996 total advertising expenditure in the UK was as follows:

Press	:	£4,816 million
Television	:	£2,303 million
Poster and Transport	:	£267 million
Radio	:	£149 million
Cinema	:	£42 million

Computer software will do all the calculations for you, but if you need to work out the number of degrees in each sector yourself, use this equation:

$$\frac{\text{Sector total} \quad \times \quad 360°}{\text{Total population}}$$

For example, the calculation for the press is:

$$\frac{4816 \quad \times \quad 360°}{7577} \quad = \quad 228.8°$$

Three variations on the basic pie chart are the:

illustrated pie chart

half-pie chart

multi-pie chart.

Press   Television   Poster and Transport   Radio   Cinema
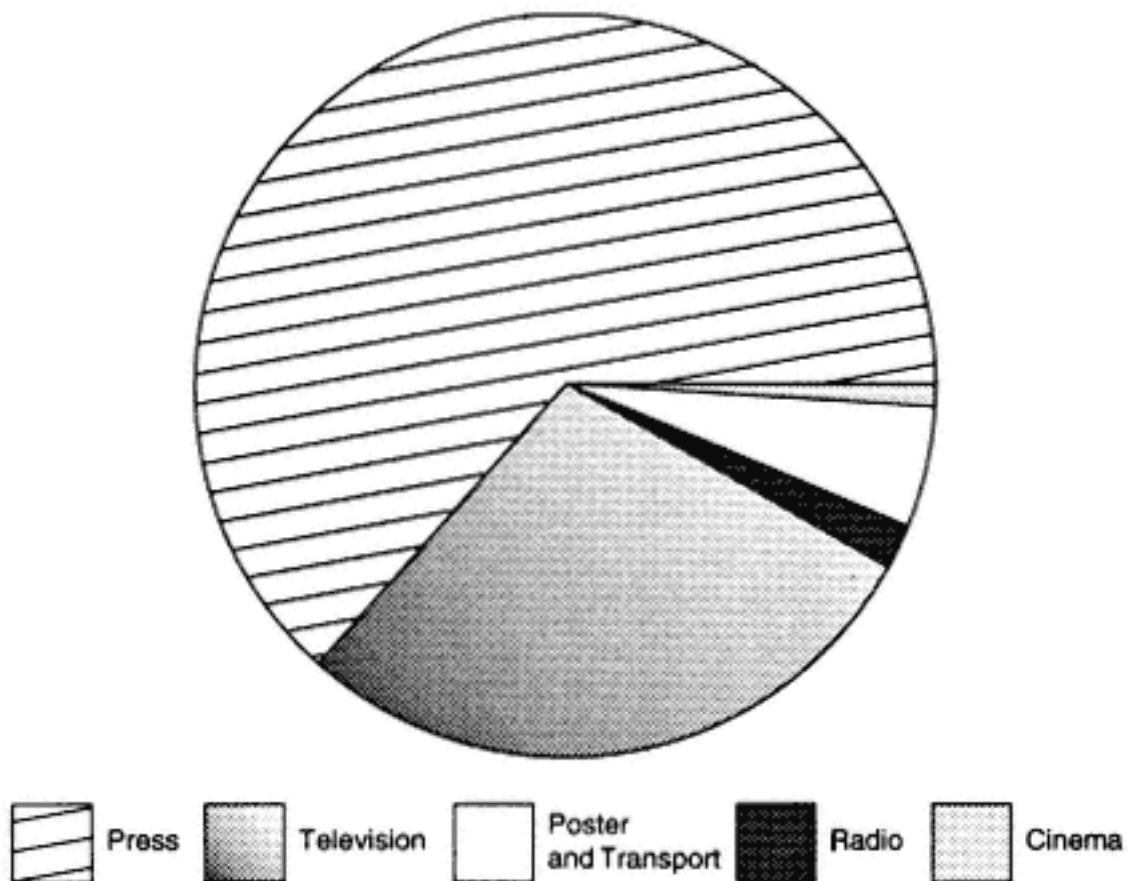
Fig. 9.
A pie chart.

The illustrated pie chart simply includes some illustration or drawing relevant to each slice of the pie. In the example given in Figure 9, it probably would be a few newspapers, a television set, and so on.

The half-pie chart depicts only the top half of a circle. To calculate the number of degrees appropriate to each division, multiply by 180° instead of 360°.

The multi-pie chart consists of two or more pie charts each with similar constituent parts. The size of each pie chart will depend on its relative importance. For example, a pie chart illustrating the distribution of trade in the USA would be larger than one for Britain. These charts are quite difficult to draw.

Bar Charts

This is a simple way of comparing values by using bars of various lengths, drawn to scale. In other words, it is an excellent way of illustrating relationships between items. Figure 10 is a bar chart showing the main crops grown in Britain during 1996.

Variations on the basic bar chart include the:

sectional bar chart

percentage bar chart

dual bar chart.

Fig. 10.
A bar chart.

< previous page   page_146   next page >
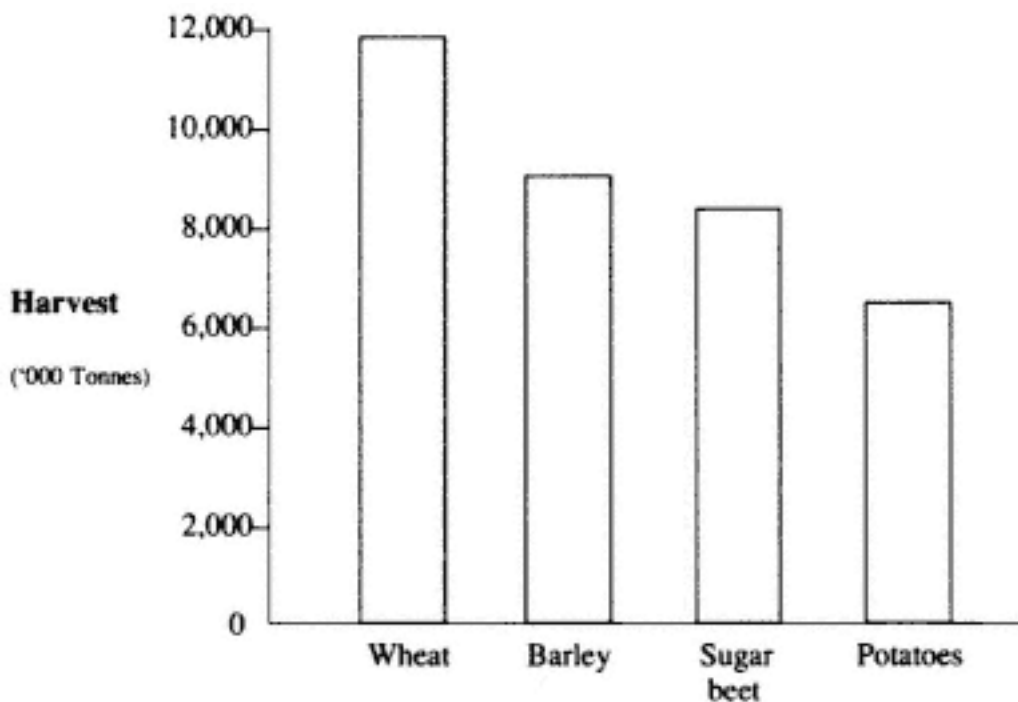
Sectional bar charts show the magnitude of items *and* their constituent parts. For example, a chart showing passenger traffic at Britain's four main airports in 1985, 1990 and 1995 would comprise three bars (showing the total traffic for the three years), each divided into four (showing the traffic going through the individual airports).

Percentage bar charts show the percentage a constituent part bears to the whole. For example, if you wanted to compare the number of votes cast for political parties at the last general election with the number of candidates elected, you would show two bars of identical size; one divided to reflect the percentage of total votes cast for each party, the other the percentage of total MPs elected.

Dual bar charts compare two or more related quantities over time. For example, they could show the percentage of households with cars, central heating and telephones in 1990 and 1995. For each of these there would be two bars, next to each other, one for 1990 and one for 1995.

Pictogram

This is similar to a bar chart except that it is usually horizontal and it uses symbols instead of bars to represent magnitudes or frequencies. Figure 11 is a pictogram which shows the passenger traffic at Britain's main airports in 1995.
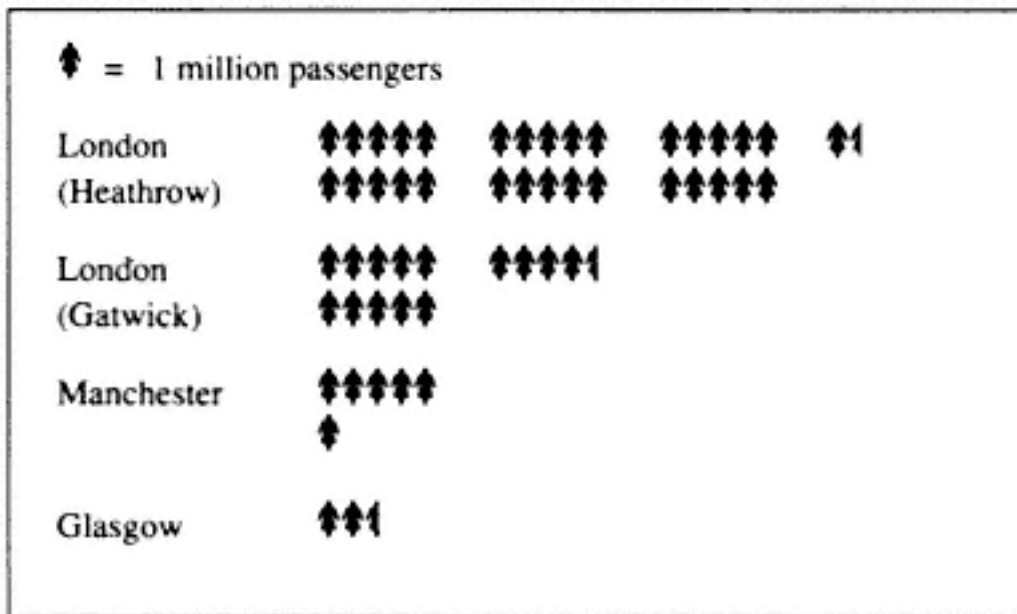
Fig. 11.
A pictogram.

Illustrations which Show Detailed Information

These illustrations must facilitate detailed readings or provide detailed answers to questions. Three of the most effective ways of achieving these aims are by the use of a:

graph

algorithm

table.

Graph

A graph shows the relationship between two variables, and it is an excellent method of illustrating detailed relationships between items. The vertical axis is usually scaled in units of the dependent variable (the quantity which is being controlled or adjusted), while the horizontal axis is usually scaled in units of the independent variable (the quantity being observed).

A variation on the simple graph is the pictorial line graph where 'pictures' are added. For example, if you were comparing the efficiency of postal services in different parts of the world, you could superimpose national stamps to distinguish the countries represented by the various lines on the graph. However, be careful not to make any graph too complex. There are also several other types of graph, each associated with one or more professions. For example, a financial or management accountant would be interested in break-even charts, investment risk profiles, sensitivity analyses, and so on.

Here are some rules to follow when drawing graphs:

When undertaking experimental work, draw a rough graph as you record your results. In this way you can check any irregularities immediately.

Choose a scale in which the lines or the curve will occupy most of the graph.

If possible the graph should be arranged so that it reads the same way up as the text.

In most experimental work, lines should form smooth curves.

Where results do not follow a smooth curve, or where the graph

does not represent experimental findings (perhaps it shows sales results), points should be joined by straight lines. Where this occurs you *cannot* read off between the points as with a curve.

Algorithm

An algorithm is a flow chart which will answer a question, or solve a problem, or undertake a procedure, within a finite number of steps. It does this by considering only those factors that are relevant to the question, problem or procedure. Algorithms are often difficult to write but, once prepared, they are excellent illustrations, particularly for instructional manuals. For example, they can be used to describe fault finding procedures, or how to carry out complicated checks on machinery. They can be used by readers with no knowledge of operational theory. In Chapter 1 (Figure 1), there is a very simple algorithm to help the report writer decide whether to include a particular piece of information in the report and, if so, where to place it.

Table

Your aim is to make the report as readable as possible and the use of a table is often the best way of achieving this aim while also presenting some essential, detailed information.

A common mistake in writing reports is to produce too many figures and too few explanations. The principles to follow are three-fold:

Always check figures very carefully before including them.

Restrict figures to those which are meaningful.

Make sure they are consistently produced and interpreted.

However, in some reports it is essential to include a large number of highly detailed findings. The strength of these reports is often based almost entirely on their factual content. In such cases it is usually best to use appendixes. Where appropriate, it is perfectly acceptable for your appendixes to be longer than all the rest of the report. But think of your readers. How are they likely to read the report? They will probably read the preliminaries and then the main body. The appendixes may well be an afterthought. So highlight any particularly significant findings in these preliminaries and in the main body. If you find it necessary to refer to certain tables on several occasions, it is better to include them in the main body.

Here are some rules when compiling statistical tables:

Avoid tables where there are over ten columns.

Label each column and row to identify the data.

If a column shows amounts, state the units.

If columns are too long, double space after every fifth entry.

If a particular column or row lacks data, use dashes in each space lacking the data.

If they improve legibility, use vertical lines to separate columns.

Do not mix decimals (29.3) with fractions (17 1/2).

Never assume that your readers will draw the right conclusion from the figures. They may quite easily not be reading them at all; or they may read them and come to the wrong conclusions, or perhaps no conclusions. Always say in words what they mean.

Illustrations which Show the Structure and Working of a System

Here the word system is used in its widest sense to include any structure or process composed of interrelated, interdependent, or interacting elements forming a collective entity. The management structure of a company is a system. So is a clerical or production process. So is the way a piece of machinery is built, and is used.

Three of the best ways of illustrating the structure and working of a system are by the use of a:

chart

diagram

photograph.

Chart

We have already considered pie charts, bar charts and graphs. Other charts of potential value to report writers include:

flow charts

organisational charts

maps and plans

systematic diagrams.

A flow chart is a diagrammatic representation of the sequence of operations or equipment in a natural, industrial or organisational process. It is commonly used to describe industrial and clerical processes, and computer systems and programs. Figure 12 is a flow chart illustrating inventory control by means of the calculation of the value of the inventory. As you will see, a flow chart uses a standard set of symbols. In this instance the symbols are those associated with computer science.
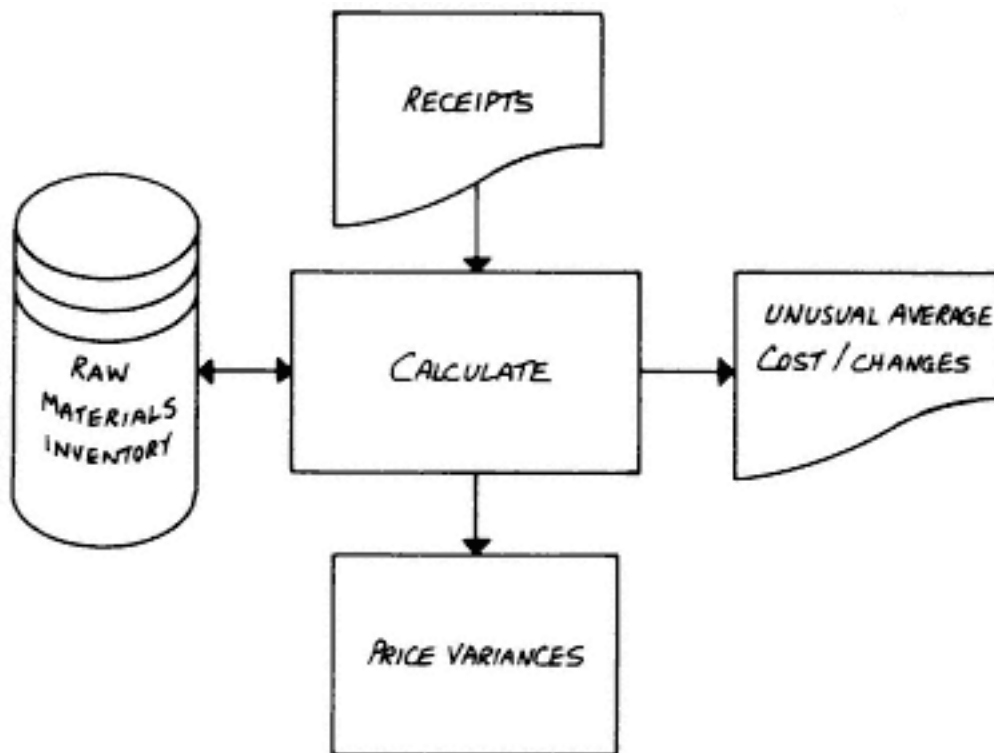
Fig. 12.
A flow chart.

An organisational chart depicts the hierarchy of, and the lines of command within, an organisation. Figure 13 represents a simple organisation which could well exist within the transport services function of a small manufacturing company.
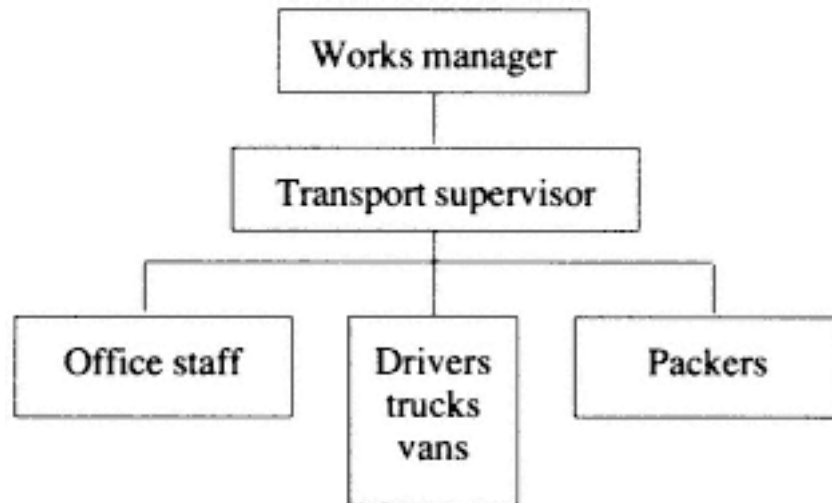
Fig. 13.
An organisational chart.

When maps or plans are included in a report it is important to state whether or not they are completely to scale. Always include a small arrow pointing northwards.

Systematic diagrams are useful when you wish to illustrate what connects with what. They are commonly used for wiring diagrams and transport connections. The famous map of the London Underground is an example of a systematic diagram.

Diagram

This is a drawing or sketch which demonstrates the form or working of something. There are several types of diagram, including:

orthographic drawing

isometric drawing

perspective drawing

exploded drawing

cut-away drawing.

An orthographic drawing is composed of the plans of the back, front and side elevations of an object. It must be drawn to scale. While it is very useful for designers and manufacturers, it is of little value for anyone who wants to know what it actually looks like.

An isometric drawing provides a pictorial method of illustrating something. Three faces are shown at once but no allowance is made for perspective; all the lines that are parallel on the object are drawn paral-

< previous page — page_152 — next page >

lel. It is easy to draw but the lack of perspective makes it look peculiar, as can be seen in Figure 14.
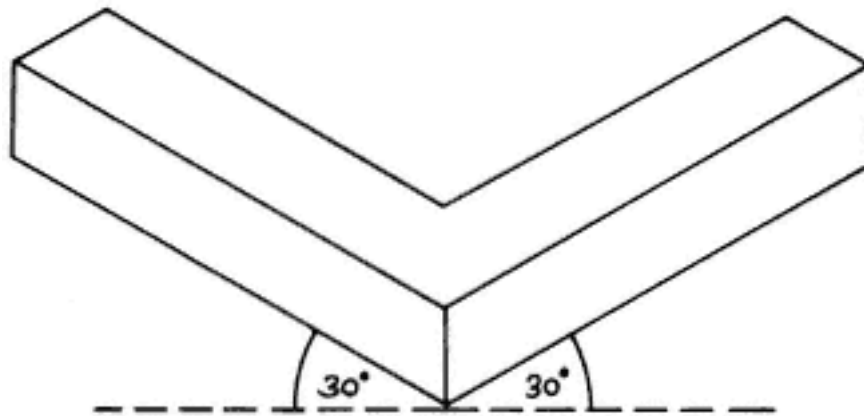
Fig. 14.
An isometric drawing.

Fig. 15.
An exploded drawing.

< previous page | page_153 | next page >
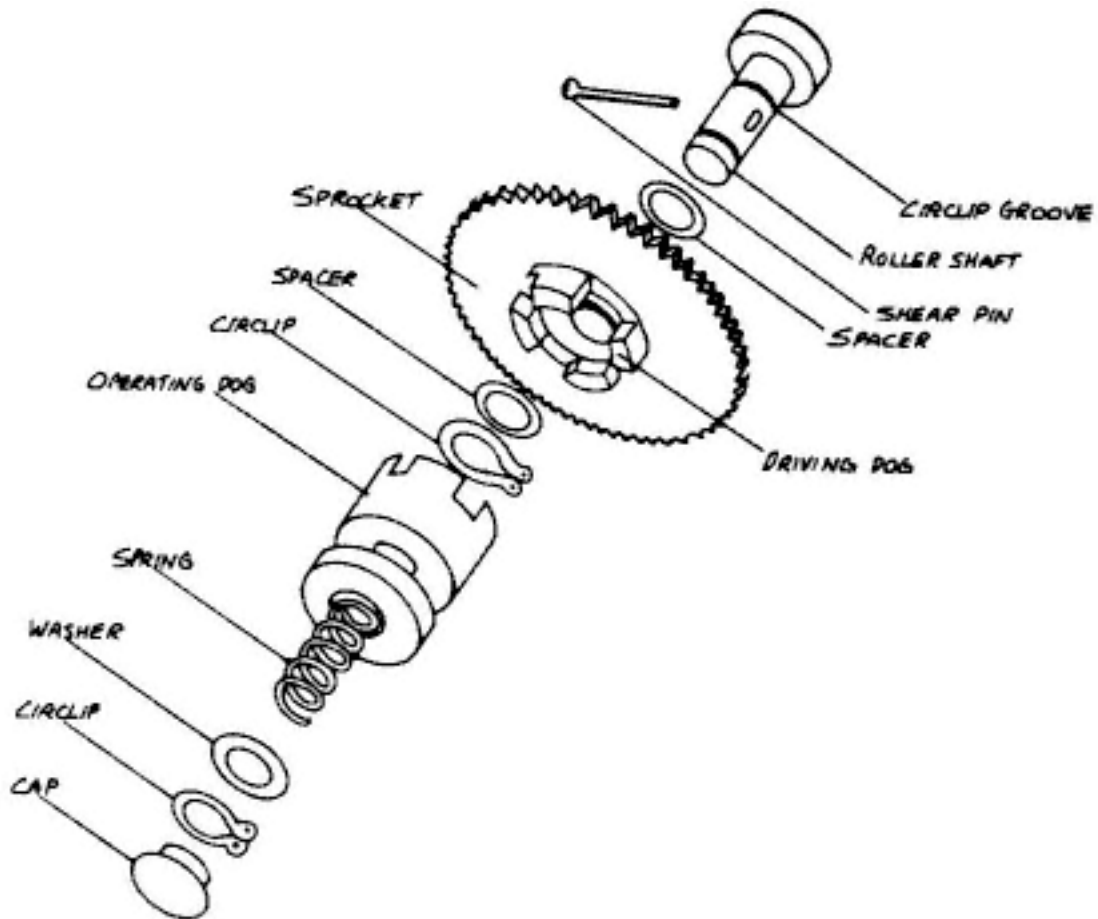
A perspective drawing, on the other hand, shows an object as it is seen by the human eye. It is more difficult to draw but it looks more natural.

An exploded drawing provides a pictorial representation of how something is constructed. It does this by showing its components in assembly as though they were spread out along an invisible axis. Figure 15 is an exploded drawing of a lawn mower dog clutch.

A cut-away drawing shows an object with its 'cover off' in certain places, or with a slice removed to reveal the inside. Figure 16 is a cutaway drawing of an electric bell.
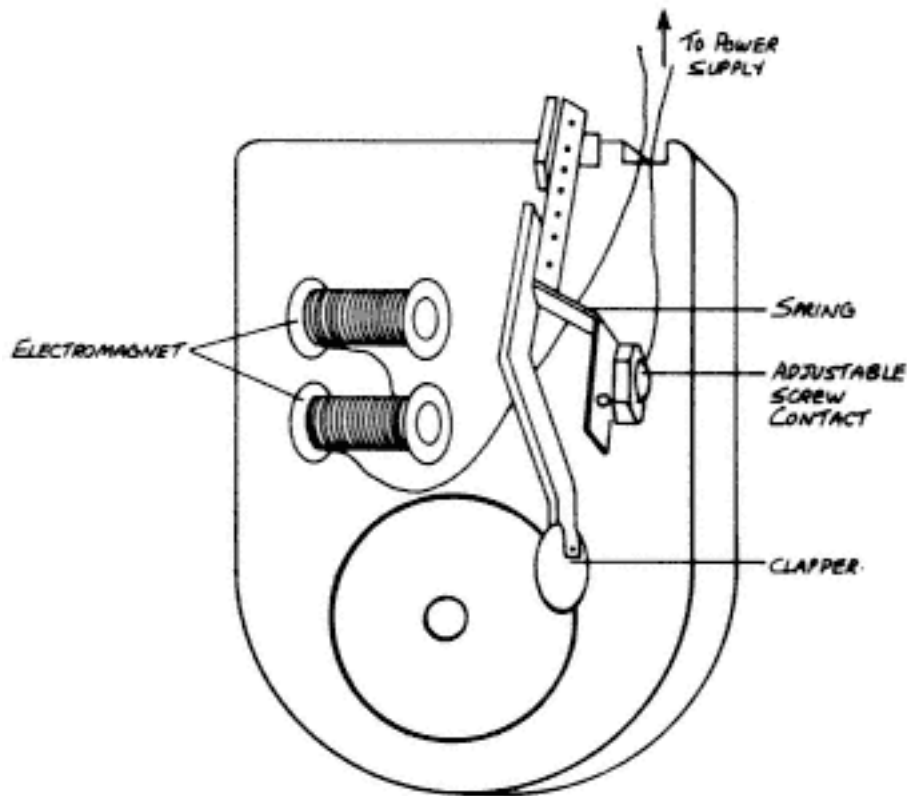
Fig. 16.
A cut-away drawing.

In general, a line drawing is better for technical illustrations than a photograph since it can be shaded or highlighted to emphasise essential points. It also reproduces well. However, a report writer should also consider whether the inclusion of a photograph would be useful and justifiable.

Photograph

A *good* photograph will show the exact appearance of an object or a situation at a particular moment in time. It is therefore useful for showing

newly created objects, ones never seen before, ones at the end of a particular stage of development, or ones worn out or damaged. If you need to show the size of an object, it is a good idea to include some familiar object in the photograph perhaps a hand, a finger, a coin, a matchbox, or a ruler.

Unless you are already a very competent photographer, it is best to keep things as simple as possible. Use an automatic 35mm SLR (Single Lens Reflex) camera. You will see exactly what passes onto the film; you will achieve an accurate focus; you will be using a system of lenses and accessories which will allow an enormous variety and flexibility of output, and you can expect good results in a variety of lighting conditions.

However, things do go wrong especially if you are not an experienced photographer. For this reason also use a back up Polaroid camera. You will be able to see your results within seconds. If you are not satisfied with them, keep clicking away until you are.

Photographs are expensive unless there is a very limited report circulation. Ask yourself whether it is really necessary to produce multiple prints to affix to each copy. Will half-tones be adequate? The answer to this question will depend largely on the number of copies and the nature of the readership. You will have seen property descriptions prepared by estate agents. On the description of an imposing property (that is, an expensive one likely to be of interest to rich people), you will probably see a print. On the description of a less imposing property (that is, a cheaper one likely to be of interest to people of more moderate means), you will probably see a half-tone. So ask yourself what you are trying to 'sell' and to whom you are trying to sell it.

Checklist: Visual Illustrations

Use artwork to enhance, illustrate or provide additional information.

Make sure it proves what you intended it to prove.

Refer to it in the text *before* it appears, not after.

Discuss and explain its significance.

Size art to fit your needs but be sure that you keep them in proportion.

Use a sensible scale and give details of this scale.

Crop art to eliminate unwanted portions.

Keep it simple; do not include too much detail.

Do not use so many special effects that they cease to be special.

Do not overdo it; too many illustrations will overwhelm the reader. One large image is far more eye-catching than half a dozen small ones.

Make sure that any artwork (including charts and graphs) is viewed at the same distance as the text a reader should not have to hold a page closer or farther away when looking at an illustration.

Give each illustration a caption and figure number.

Where appropriate, acknowledge your source.

If there are more than just one or two illustrations, list them on the contents page.

Remember that non-digitized art can be mechanically pasted up and reproduced on a copying machine or taken to a professional printer.

Colour

Colour adds a whole new look to a document. Today, full-colour computer-generated reports can be a reality through ink jet, thermal or laser printing. Systems are becoming more sophisticated all the time and as the technology is advancing, so the price of having colour printers connected to your computer is decreasing. Black and white reports are rapidly becoming as outdated as black and white television sets.

If colour printers are not available to you, you still have the option of using coloured paper. Light-tinted paper with black type is less glaring for readers. In addition, the use of a variety of colours of paper is helpful in coding your work. For instance, different sections can be produced in different colours or a variety of handouts can be made in a variety of colours for easier referencing.

Coloured paper:

prevents glare

codes pages

adds variety.

Several companies now provide paper with pre-printed colour designs. Many also offer computer templates which enable you to see these designs onscreen. Print, graphics and art can then be planned and keyed aesthetically around them. When you insert the paper into the tray of the computer, you are able to run black print onto the design. The result is the look of a full-colour document; yet you are using only a traditional black and white printer.

In general, for most documents you will want to use a light background with dark type (see Figure 17). Full-colour clip art is available for importing into your documents. A revolution is now underway in using colour for presentations, and the use of colour for reports will become more and more available in the future.

Fig. 17.
Contrasting backgrounds and type.

Sophisticated readers of today expect and deserve more than black printing on a white background. Use this to your advantage. Colour creates moods, sensations and impressions that can be highly effective in achieving your objectives.

Checklist: Colour

Be sure that you have the capability to print in colour at an affordable price before planning and producing your report in colour.

Limit the use of colour to about three or four pages unless full colour is used.

Use sufficient contrast for effective reading dark print on light background or light print on dark background.

Give objects their proper colour, such as green leaves or yellow bananas.

Remember that approximately ten per cent of males and seven per cent of females are colour-blind red and green used side by side may merge.

Paper, Covers, Binding and Indexing

Finally, a word about the choice of paper, covers, binding and possible indexing for your report. Appearance really does matter. So does durability. It is obvious that glossy, professional-looking reports will project the sort of image that most companies wish to foster with existing and potential customers and/or shareholders. Perhaps what is less obvious is that sometimes it is desirable to produce low-budget reports for more than just reasons of economy. For example, it is rarely necessary to produce an ornate product if it is for internal consumption only. Even if your department does have money to burn, it is not a good idea to advertise the fact.

As you think about the physical construction and appearance of a report, bear these points in mind:

Your purpose (the action you intend the report to generate).

The readership (number and nature).

The expected life of the report (including the number of likely references to be made to it).

What materials and facilities are available within your organisation.

The cost of these various options (and your budget).

Paper

There are three aspects to consider when choosing paper, namely its:

size

quality

colour.

Most reports are written on A4 size paper (210 × 297 mm). However, there are other possibilities (see page 131). The quality of paper you choose will depend on all the factors listed above. For example, do not use poor quality paper if the report is likely to be referred to frequently.

The importance of conciseness has been stressed throughout this book. However, this does not mean use as little paper as possible. It is also important not to present the reader with huge blocks of uninterrupted type. If you are really concerned about the future of the Scandinavian and Canadian forests, the amount of paper saved at the planning stage will more than compensate for an extra few sheets in the report itself. You could also think about using recycled paper.

It is customary for reports to be written on white paper. However, as we have seen, sometimes it is useful to use different colour paper in different sections of the report. If you do this be sure that:

The colours are easily distinguishable.

Dark colours are avoided.

The different sections are logical and rational.

Alternatively, you could use white paper throughout and coloured partitions between the sections.

Covers

Every report should have covers, if only an extra sheet of paper at the back and front to serve as a dust jacket. However, most reports will be enclosed by glossy boards (cards). Other covers will be made of plastic or even imitation leather, perhaps with a pocket so that other related documents can be kept with the report. Customised covers on a report can set it apart.

Covers protect reports which are likely to be read by many people or saved for a long period of time. A report is twice as likely to be read and three times as likely to be saved if it has attractive (though not necessarily expensive) covers.

Many reports will have no more than a title on their covers. Others will include the organisation's name and logo and/or a space for a reference number, the date of issue and the name of the department responsible for the production of the report. Sometimes a 'window' will have been cut out of the front cover. This allows the reader to see the title as it appears on the title page.

Think carefully about the colour of your covers. Dark ones are often very depressing while very light ones or ones using a combination of bright colours may give an unwanted impression of light-heartedness. 'Safe' colours for reports are either blue or green.

Binding

There are several inexpensive binding systems available. Your choice will depend largely upon:

The size of the report.

Whether amendments will be necessary.

Whether inserts will be necessary.

The distribution requirements.

The quality requirements.

The binding methods used for other related reports.

What system or systems are available within your organisation.

Here are some common methods of binding:

treasury tag

stapling

plastic gripper

gluing

stitching

ring binding.

Treasury Tag

Tags come in various sizes identified by their colour. Punch a hole in the top left of the report. Make sure it is at least an inch into the paper both from the top and the left, otherwise sheets will soon become detached. For larger reports, also punch a hole at the bottom left, or use a four-hole punch. This method of binding is suitable where amendments will be likely and/or where inserts such as maps and plans are expected. Do not use tags to bind reports which are larger than 100 sheets.

Stapling

Here you simply staple the covers and pages at the top left corner. For reports of 10 to 20 pages, it is best to staple them from the front and the back. Then place the report in a plastic wallet. A more sophisticated method is to staple down the left hand side and cover them with adhesive binding strip. Be sure to leave wide margins, and double staple at the top and bottom of the report. Never use paper clips. Pins are slightly better, but for reasons of safety they are not recommended.

Plastic Gripper

This method is an improvement on the use of staples down the left side of the report, but the principle is the same. Use a plastic slide-grip along the left hand edge of the assembled covers and sheets. Once again, remember to leave wide margins if you intend to use this system.

Gluing

The edges of the sheets are glued and fixed into the spine of a fabric, card or plastic cover. This method is suitable only for reports of about 25 pages or more and it should be attempted only by the most dexterous of report writers. A more sophisticated method is known as hot metal gluing.

Stitching

Here the report is made up of sheets folded in the middle to make two single-sided or four double-sided pages. They are then bound by a method known as saddle stitching. This system is not suitable for larger reports because the pages tend to become distorted. It is possible to have reports stitched and cased commercially in hardback form. However, this would be a far more expensive exercise.

Ring Binding

This gives a report a professional appearance and it is suitable for works of up to around 20 sheets. You will need to have access to a special machine which perforates the binding edge and then threads the binding (plastic or wire) through the holes in the covers and the report. The pages of the report will then lie flat when opened. Plastic binding is preferred because sheets can be added or removed, as required. This is not possible with wire binding. Any organisation which produces reports regularly and/or in quantity should seriously consider acquiring a ring binding machine.

Indexing

The report will have a contents page and it may have an index. It is possible to further improve the presentation by making it even easier for readers to find their way around the report. This can be done in a number of ways, as illustrated in Figure 18.

The thumb-index pages method is quite complex and it needs to be undertaken professionally. Therefore it is only appropriate where there will be a wide external circulation. On the other hand, the overlapping pages method is very simple: each section is identified by pages of unique width. It is most suitable for short reports. Side indexing is another straightforward method. It is achieved simply by attaching protruding selfadhesive labels to the first page of each section of the report. Each of these methods can be complemented by the use of different colour pages to identify the various sections of the report.
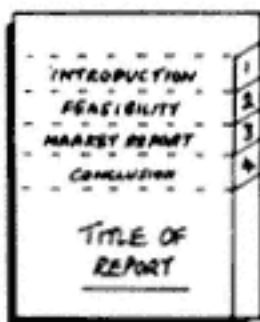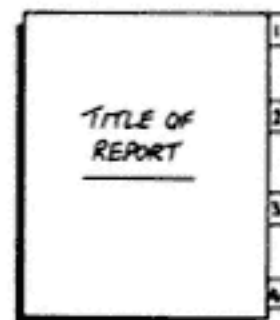
Fig. 18.
Indexing a report.

Summary

Appearance matters. The way you present your text and artwork, and your choice of paper, covers, binding and possibly indexing, will be strongly influenced by your purpose, your readership, the expected life of the report, the options available to you within your organisation, and their relative cost.

Word Processing and Desktop Publishing

Modern word processing and desktop publishing packages present opportunities to the report writer that were unthinkable a few years ago. However, do not get carried away with the possibilities. Remember that your purpose is to communicate *simply* and *effectively* with your readers.

Layout and Design

Presentation can be greatly assisted if sufficient thought is given to the report's:

format

page size and orientation

margins and spacing

headings and subheadings

numbering.

Typography

This is the art and style of printing. A very wide range of typefaces and fonts is available. Be selective, and choose ones that will help you develop the right departmental or corporate image and identity for your business.

Visual Illustrations

Well produced and *appropriate* illustrations really enhance a report. They make information readily understandable, easily digestible and memorable. It is much easier to assimilate information presented pictorially.

However, illustrations should only be used if they are easier to understand than the words or figures they represent. They should *never* be included for their own sake. Ask yourself: are they relevant to the text?

Before you decide the kind of illustration you will use, ask yourself what is its *purpose*: is it intended to give an overall impression of something, to show some detailed findings, or to show the structure and working of a system? Then choose the most appropriate illustration to achieve this end.

If a reader will *need* to see the illustration in order to understand the text, place it as close to the point of reference as possible. However, if it is merely *supplementary* to the text, it is often preferable to place it in an appendix.

Colour

Reports printed only in black, and always against a white background, are rapidly becoming as old fashioned as black and white television sets. Today's technology can make full colour printing a reality.

Paper, Covers, Binding and Indexing

Finally, consider the overall appearance and required durability of your report.

Think about the size, quality and colour of paper you will require.

Remember that your report should have covers and that customised ones would set it apart.

Consider which binding system you will use.

Ask yourself whether the report should be indexed and, if so, which would be the best method to employ.
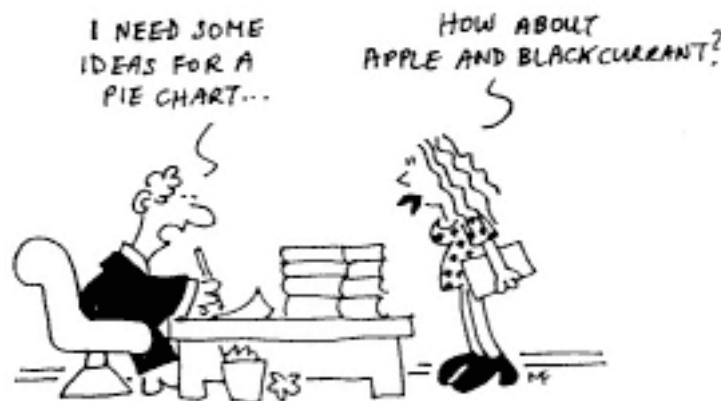
PART 3
SOME COMMON TYPES OF REPORT

Accident reports

Agendas for committee meetings

Annual reports

Appraisal reports

Audit reports

Comparative testing reports

Duty notes reports

Explanatory reports

Feasibility reports

Informative reports

Instructional manuals

Interview reports

Investigation into financial affairs of a company reports

Minutes

Process description reports

Progress reports

Research reports

Scientific reports

Student project reports

Systems evaluation reports

Technical reports

Technological reports

Trouble-shooting reports.

This chapter considers some of the most common types of report which you may be required to produce. They cover different subjects, and they have different purposes and readerships. For this reason they have different structures; they are made up of a variety of combinations of report components (introductions, summaries, and so on), and these components are often given different names in different types of report. Every report should have a title page.

In Chapter 1 we discussed report components in some detail. The comments here are intended to complement that discussion by pointing out the particular emphases associated with each report type. We shall do this by answering two questions:

1. What points should I bear in mind?

2. What would be a suitable format?

Use this information and advice to help you decide the most appropriate style, format and contents for your report. However, use them flexibly; you must also bear in mind:

The requirements of the person who commissioned the report.

House-style.

Custom and conventions.

Your objective(s).

Your readership.

Common sense.

As you plan and later draft your report, remember that while every report should be different, every report also should have some similarities. It must present relevant facts accurately and in a way that is both acceptable and intelligible to its readers. In other words, it must have a beginning, a middle and an end. Only then can you expect to achieve these three essential aims:

to be read without unnecessary delay

to be understood without undue effort

and to be accepted.

So always think about the needs of your readers. They are the important people, and they have a right to expect you to make things as easy for them as possible. If you do not help them, why should they help you?

Accident Reports

These reports hopefully will not be required on a regular basis.

What Points Should I Bear in Mind?

Balance speed with accuracy. The reason for speed is so that all salient facts are accurately recorded before details are forgotten. The reasons for accuracy are to minimise the risk of any possible recurrence, to comply with the law and to be prepared to face a possible claim for damages. You will require accurate illustrations supplemented by statements from participants, witnesses and experts.

What Would be a Suitable Format?

If you have no formal report form, use these headings:

1. What was the accident?

2. Where and when did it occur?

3. Who was involved?

4. Was any injury sustained? If so, what was it?

5. Who reported the accident?

6. What medical treatment was applied when and by whom?

7. What caused the accident?

8. What has been done to correct the trouble?

9. What recommendations do you have to avoid a recurrence?

Agendas for Committee Meetings

An agenda is a list of items to be discussed during a meeting. It must be drawn up in advance.

What Points Should I Bear in Mind?

An agenda may take various forms, according to the requirements and, in some cases, the kind of meeting to which it refers. Be sure you know precisely what is expected of you. Here are two common forms of committee agenda:

the standard agenda

the discussive agenda.

The standard agenda simply lists the subjects to be discussed, and the order in which they will be taken.

The discussive agenda is designed to stimulate thought *before* and comment *at* the meeting. It is often used for 'one-off' meetings.

No business should be placed on an agenda unless it comes within the scope of the committee, and it is within the power of the committee to deal with it. Conversely, no relevant item of business should be omitted.

In deciding what to include on an agenda, bear these points in mind:

Talk to the chairperson and other committee members who may have business to include.

Refer to the minutes of previous meetings for any business or discussions which were then deferred, and for reminders of routine annual, half-yearly, quarterly or monthly recurring items.

Keep a special file of documents which are likely to be required at the next meeting. Sort and arrange them before drafting the agenda.

Then think carefully about the order in which items should come up for discussion. Consider these factors when deciding the order:

Refer to any rules governing the meeting which regulate the order in which items of business are dealt with.

If there are no such rules, make sure the items are in a logical order. Wherever possible, the end of the discussion on one item should lead naturally on to the next.

It is normally preferable to put routine business first.

Try to place difficult or contentious items just after half-way through the agenda, with some simple, uncontentious items before and after them. This is known as a bell-curve structure. Begin with some items likely to achieve a consensus. Then move on to your more 'difficult' subjects. Conclude with more simple, uncontentious items so that the meeting will end amicably.

Make it easy for the committee members to find their way through the agenda by using these devices:

Number all items consecutively, beginning with '1'.

If separate documents are required for any item, quote the reference number under the appropriate heading together with the date of circulation. If they are to be circulated later, or handed out at the meeting, say so.

Where an item on the agenda is being continued or carried forward from a previous meeting, quote the minute and date of that meeting.

At the end of the agenda provide a checklist of the documents required for the meeting, in the order in which they will be needed.

Finally, obtain the chairperson's approval of the agenda *before* circulating it. This agenda will form the basis of the minutes of the meeting (see below).

What Would be a Suitable Format?

Standard Agenda

A suitable format for a standard agenda would be as follows:

1. Heading (including where and when the meeting will take place)

2. Apologies for Absence

3. Minutes of the Previous meeting

4.

5.   Items requiring the attention of the committee

6.

7.

8. Any Other Business ('leftovers', not items that should have been discussed within section 47)

9. Date of Next Meeting (also give the time and location)

10. Papers Required for the Meeting (in the order that they will be needed).

Items 13 and 810 are standard. Between them come all other items requiring the attention of the committee.

Discussive Agenda

A discussive agenda could be structured as follows:

1. Heading (including where and when the meeting will take place)

2. Introduction (what will be discussed, and why keep it fairly general)

3. Scope (what are the boundaries of the discussion?)

4. Discussion points (list the items to be discussed and the reasons for discussing them)

5. Possible action (what options are open to the committee?)

6. Summary (the reason for the meeting; what it hopes to achieve and why members should attend and contribute)

7. Papers required for the meeting (in the order that they will be needed).

Annual Reports

An annual report lists the achievements and failures of an organisation. It is a progress report in which every department is accounted for.

What Points Should I Bear in Mind?

The physical appearance of annual reports is crucial. For that reason they are usually prepared professionally. The cover and the first few pages must attract and then maintain the readers' interest. Make the cover attractive and eye-catching; keep the text well spaced and content not too heavy. Begin with some simple facts about the organisation and what it does. Use short paragraphs with bold print to emphasise the key points. Include illustrations to attract interest and to break up overbearing columns of figures. When you use photographs of people, record their names. Too many reports give the name of their chairperson but then describe a member of staff as 'an engineer', or whatever. Workers, like chairpersons, have names.

As a general rule, the shorter the report the better the chances of attracting a fringe readership. So make sure you gather *relevant* data from all parts of your organisation. Obviously every department will wish to emphasise its successes and gloss over (or simply ignore) its failures. For this reason the use of standard questionnaires is recommended. This will provide only the information you require, and it will be in a uniform format and style. Use this as the basis of the main body of the report.

Annual reports usually include a chairperson's statement. Most of these statements are far too long. Tactfully explain that all that is required is a résumé and critical analysis of the past year's work, and an assessment of prospects. This section should pass logically from topic to topic. It should be informative, businesslike and balanced. It should also be concise no more than 1,000 words (less if possible).

What Would be a Suitable Format?

This depends on the nature of the organisation and the readership. Here is one possible format:

contents list

what the organisation does

some of the year's highlights

chairperson's statement

main body (possibly department to department, or task to task)

accounts

appendixes.

A standard format is useful for year-to-year comparisons.

Appraisal Reports

These appraise a person's performance on his or her current job, identify methods of improving this performance, highlight training needs, and often assess suitability for another job, promotion, and/or a change in salary.

What Points Should I Bear in Mind?

Appraisal reports are very important because what you write will have a direct effect on people's career prospects. They are very difficult to write. The dilemma is that, on the one hand, you need to know a person quite well in order to write a fair report while, on the other hand, it can be difficult to be objective when you know a person quite well. Not only that, you will need to decide what is relevant and what is not. For example behavioural patterns are likely to change according to circumstances, and we tend to remember extremes of behaviour. Ask yourself: 'Are they really typical? Try keeping a notebook and update it regularly in order to build up an accurate and balanced picture of people. Also talk with them about this throughout the year, not just at counselling and appraisal interviews.

The responsibilities of an appraisal report writer, therefore, are acute. Be specific and avoid euphemisms. You must be able to justify every tick in the matrix boxes, and every word and phrase you use.

What Would be a Suitable Format?

You may be required to complete a standard form. Details will vary from organisation to organisation, but the broad outline of an appraisal report should cover the following headings and questions:

1. The Job

The job description, its objectives, component tasks, methods and resources.

Are they satisfactory?

If not, why not?

What changes are required?

What action is recommended by whom, how and why?

2. Job Performance

What objectives must be met and what tasks must be fulfilled?

Have these been achieved?

What is the actual evidence from work performance, indicating success or failure?

How far have any failures been within or outside the job-holder's control?

What does the evidence of past performance show about the strengths and weaknesses in knowledge, skills and attitudes of the job-holder?

What precise action is recommended by whom, how and when to build on strengths, to remedy weaknesses and to develop the individual by means of training and further work experience?

3. Summary of Action Proposed

What action has been agreed to be taken by whom, how and when?

Audit Reports

There are two types of auditor: the external auditor and the internal auditor. The role of the former is laid down by statute and in case law; that of the latter, while also affected to some extent by case law, is ultimately what management wants it to be. Therefore the structure of audit reports will depend on the type of audit work being undertaken.

External auditors are independent of the companies on which they report. They are required to report to the shareholders at general meet-

ings on whether the final statements of a company give a 'true and fair view' of the state of the company's affairs. If they are uncertain, or if they do not believe this to be so, they must say so in what is known as a qualified audit report. It is now normal practice also for external auditors to issue reports to management which are more akin to internal audit reports.

Internal auditors are concerned with the segregation of duties and the internal control of the business for which they are employed. The structure of their reports tends to be fairly consistent, but it is *not* defined by any Auditing Standards.

What Points Should I Bear in Mind?

In a few words the external auditor commits himself or herself to a high degree of responsibility. If the contents of the report do not reflect the due care, skill and diligence expected of a qualified person, the auditor may be held liable for damages. It is essential, therefore, that the report should be carefully prepared to reflect an opinion within the limits of the examination, and sufficiently clear as to leave no likelihood of misinterpretation by those whom it concerns.

The internal auditor does not face such an onerous responsibility because the report is not written for the same audience it is for internal consumption (although the external auditor may decide to place some reliance upon it). However, like all report writers, the internal auditor must always strive for objectivity and accuracy.

What Would be a Suitable Format?

The usual format for an external audit report on the financial statements of a company incorporated in Great Britain is as follows:

1. Introduction

2. Respective responsibilities of directors and auditors

3. Basis of opinion

4. Opinion.

An external auditor's report to management will include any or all of the following sections:

1. Weaknesses in internal control and recommendations on how they may be rectified.

2. Breakdowns in the accounting systems and any material errors arising.

3. Additional audit time required as a result of either section 1 or 2, or the clients' failure to adhere to timetables.

4. Unsatisfactory accounting procedures or policies, and recommendations as to how they may be improved.

5. Suggestions as to how financial and accounting efficiency may be improved.

6. Constructive suggestions not necessarily related to accounting procedures but noted by the auditor during the course of his or her investigations, with the benefit of an outsider's viewpoint.

A suitable format for an internal audit report is as follows:

1. Contents page

2. Summary (the main findings, conclusions and recommendations)

3. Introduction (what broad subjects were audited, where and when)

4. Scope (what precisely was audited, and possibly what was not)

5. Main body (the findings, divided into logical sub-sections)

6. Conclusions (flowing naturally from the main body)

7. Recommendations (flowing naturally from the conclusions)

8. Appendixes

Comparative Testing Reports

Perhaps the best known of these reports is *Which?* magazine. Its purpose is to select a number of standards, make comparisons of these standards from item to item, and then reach logical conclusions and recommendations about which are the best and/or which represent the best value for money.

What Points Should I Bear in Mind?

It is essential to choose *sensible* standards and then to define them very

carefully at the beginning of the report. Here are some standards important in any well-designed product:

Does it work properly? A pop-up toaster should pop up toast.

Is it fit for its purpose? A portable television should be portable.

Can it cope with the likely conditions of use? A public telephone should be vandal-resistant.

Is it durable and easy to maintain for its expected lifespan? For example, are spare parts readily available?

Is it safe and easy to use? A cooker should have no sharp edges and its controls should be clear.

Is it pleasing to look at and to handle? Wallpaper must be attractive to potential customers.

Does it have 'style'? A well-designed product combines a careful choice of colours, patterns and textures. It should be aesthetically pleasing.

Obviously the precise standards you choose will depend on the items being compared. Here are some examples of standards important when choosing a telephone:

target price (comparing similar models)

colour options

features:

     last number redial

     number of memories

     a display

     battery back-up

     weight of handset

     maximum loudness of ring

What Would be a Suitable Format?

There are two basic ways of presenting these reports. The first is to define the first standard and then compare the performance of each item before moving on to the next standard. The second is to name the first item and then record how it matches up to various standards, before moving on to the next item.

There are three customary formats for comparative testing reports, as follows:

Comparison by Standard Format A

1. Contents page

2. Introduction

3. Explanation and description of items to be compared

4. Comparison by Standard:

    Standard A

        Item (i)

        Item (ii)

        Item (iii)

    Standard B

        Item (i)

        Item (ii)

        Item (iii)

    Etc.

5. Conclusions

6. Recommendations.

Comparison by Standard Format B

1. Contents page

2. Introduction

3. Summary of Standards and Data

4. Conclusions

5. Recommendations

6. Appendixes

(i) Explanation and description of items to be compared

(ii) Comparison by Standard A:

    Explanation of Standard A

    Comparison of items

(ii) Comparison by Standard B:

    Explanation of Standard B

Comparison of items

Etc.

Comparison by Items

1. Contents page

2. Introduction

3. Explanation of Standards

4. Comparison by items:

Item (i):

    Standard A

    Standard B

    Standard C

Item (ii):

    Standard A

    Standard B

    Standard C

    Etc.

5. Conclusions

6. Recommendations.

If the comparison requires quite sophisticated technological investigation, you should also consider the use of formats B or C of Technological Reports.

Duty Notes Reports

See Instructional Manuals.

Explanatory Reports

These are *factual* reports which provide an account of something that has happened.

What Points Should I Bear in Mind?

You must be unbiased and objective. Do not give any recommendations unless you are asked to do so.

What Would be a Suitable Format?

This is a suitable format for an explanatory report:

1. Contents page

2. Introduction

    Why was the report prepared, and who requested it?

Give a 'pen picture' of whatever has happened.

What is the position and authority of the writer?

3. Persons involved

Give their names and positions, where relevant.

4. Sequence of events

A simple, straightforward account of what happened.

5. Action taken

List all the critical actions taken in the order in which they occurred and the reasons for them. If necessary use appendixes.

6. Cause and effect

What were the causes and effects of these actions?

7. Conclusions

How was the information for the report gathered?

How long did this take?

What degree of accuracy can the reader reasonably assume?

Are any important facts omitted?

If so, why?

8. Recommendations

If required.

9. Appendixes

See section 5.

See also Informative Reports.

Feasibility Reports

These discuss the practicality, and possibly the suitability and compatibility of a given project, both in physical and economic terms. They also discuss the desirability of the proposed project from the viewpoint of those who would be affected by it. Report writers must come to a *conclusion*, and must *recommend* that some action is taken or is not taken and/or that some choice is adopted or is rejected.

What Points Should I Bear in Mind?

You must be unbiased and your approach must be logical. Be sure that you know the precise purpose of the proposed project and also its scope. See also Systems Evaluation Reports.

What Would be a Suitable Format?

This is a suitable format for a feasibility report:

1. Abstract

2. Summary

3. Contents list (including a separate list of illustrations)

4. Glossary

5. Introduction (purpose and scope)

6. Discussion (the main body providing the evidence use appendixes if necessary)

7. Conclusions (flowing naturally from the discussion)

8. Recommendations (flowing naturally from the conclusions)

9. References (if necessary)

10. Appendixes (see section 6).

Sometimes sections 1 and 2 are combined.

Informative Reports

These are more general than explanatory reports (see above), but there is a degree of overlap. The purpose of an informative report is to increase the readers' knowledge of an event or to bring them up to date.

What Points Should I Bear in Mind?

You must present a clear overall theme. Each section of the report must be appropriate to this theme; there must be a good reason for including it. It is important to provide a logical plan because some readers may be interested in perhaps just one or two sections of the report.

What Would be a Suitable Format?

This is a customary format for an informative report:

1. Contents page

2. Introduction (why was the report produced and what is hoped to be achieved by it?)

3. Plan (how the Main Body is structured)

4. Main Body (possibly one subsection for each main piece of information)

5. Conclusions (flowing naturally from the Main Body also what, if anything, is it hoped will happen next?).

Sometimes sections 2 and 3 are combined. See also Explanatory Reports.

Instructional Manuals

Instructional manuals and duty notes are written to explain *how* a job or process (or perhaps how a particular aspect of a job or a process) is to be performed.

What Points Should I Bear in Mind?

Good instructional manuals and duty notes are written by people who know the job or process well. They know how much detailed instruction to include, and how much to leave out. Once you have drafted your instructions, try them out first on someone who is likely to use the report.

Do not confuse instructional manuals with Process Description Reports. As already stated, the former explain *how* a process is to be performed; the latter help the reader *understand* that process. So be absolutely sure of your purpose before deciding on a suitable format.

What Would be a Suitable Format?

This is a typical format for an instructional manual or a set of duty notes:

1. Contents page

2. Job/Duty/Process objective (a brief statement of subject, purpose and scope)

3. Theory or principles of the operation (the mechanics of the process)

4. List of materials and equipment needed

5. Description of the mechanism (an overview of the equipment, possibly breaking it into its component parts)

6. List and number of steps necessary to complete the job

7. Instructions for each step (the main body)

8. Precautions necessary (explain why)

9. Show what must be done (use illustrations to support section 7)

10. The degree of difficulty at each stage.

Sections 35 and 8 are often omitted from clerical duty notes.

Interview Reports

Effective interviewing techniques are not within the scope of this book. However, a brief discussion on the preparation of interview reports is appropriate.

What Points Should I Bear in Mind?

Clear and adequate reports are essential to an interviewer who seeks a detailed and accurate recall and evaluation of interviewees (perhaps job applicants). Interviewers who lack the technique of interview report writing will merely attempt to rationalise their decision.

There are two types of interview report. The first is designed to ensure that an interview is well-structured, comprehensive, and that adequate and relevant notes are taken. The second is used to evaluate the material gathered during the interview.

What Would be a Suitable Format?

The following format provides a useful framework for an interview. There will also be several sub-subheadings which are not given here. However the framework must be used with discretion. A good interview is organic, not mechanical.

A Structured Interview Report

1. Interviewee, interviewer, reference, date, time and location

2. Physical:

      First impression

      Appearance

      Speech

      Health

3. Attainments:

      Work

      Educational

      Extramural

4. Interests

5. Circumstances:

      Family background

      Domestic and social situation

6. Special aptitudes

7. General intelligence

8. Disposition.

After the interview the interviewer will need to evaluate the interviewees. This report format will be of assistance:

An Interview Evaluation Summary Report

1. Interviewee, interviewer, reference, date, time and location

2. Able to do

< previous page   page_182   next page >

3. Willing to do:

    Disposition

    Motivation

4. Summary

5. Recommendation.

Before sections 2 and 3 can be completed the candidate will first be given a raw score of 15 (poor to outstanding) for every ability and willingness raised by the interviewer. However, as some of these qualities will be more important to the job than others, they will all be given a weighting, or relative importance score (often 17; useful to vital). The raw score will then be multiplied by the weighting, and the separate products will be totalled.

The top scorer is not necessarily the best candidate. For example, there may be a minimum total required for some or all the qualities, and these may not have all been met. However, this method does force the interviewer to think about the specific requirements of the job, and about how far the various interviewees meet them.

Investigation into the Financial Affairs of a Company Reports

There are numerous types of investigation some private (for example, ones undertaken on behalf of a prospective purchaser of a business); others governed by statute (for example, reports for prospectuses and for Department of Trade investigations).

What Points Should I Bear in Mind?

In the case of a private investigation, the accountant must obtain precise instructions from his or her client (the terms of reference). In the case of an investigation governed by statute, the reporting accountant must be fully conversant with the statutory regulations, and must also obtain necessary instructions where applicable.

Throughout the investigation never lose sight of your purpose. It is all too easy to become side-tracked. First make preliminary inquiries to ascertain the information that is necessary to be able to plan the investigation. Draft a skeletal framework, detailing the headings which will be used in the final report. Then undertake all the necessary detailed work, recording your findings on working papers. From these the final report will be drafted.

What Would be a Suitable Format?

This will depend on the nature of the investigation, but a typical structure is as follows:

1. Introduction (including the terms of reference and the nature and history of the enterprise being investigated)

2. Main body (the work performed and the facts ascertained see below)

3. Conclusions (drawn from the main body)

4. Recommendations (drawn from the conclusions)

5. Appendixes (any voluminous statistics).

In the case of an investigation into a retail business on behalf of a potential purchaser, section 2 the main body could be subdivided as follows:

2.1 Management and Staff

2.2 Sales and Marketing

2.3 Purchases and Supplies

2.4 Trade Results (per audited accounts)

2.5 Prospects and Trends

2.6 Assets and Liabilities.

Minutes

Minutes can be defined as a written record of the business transacted at a meeting. They may well have some legal and authoritative force.

What Points Should I Bear in Mind?

As a general rule, the fewer the words used the better. Ask yourself, what was the purpose of the meeting? Minutes of a formal meeting must include: decisions taken, motions passed and the names of the people who attended. Those of a standing committee must provide enough information and discussion so that absent members can participate on equal terms at the next meeting. Minutes of a subcommittee must include enough to keep its parent committee in touch with developments and to explain the reasons for decisions.

Write in the simple past tense (Mr Smith reported that . . .), and as soon as possible after the meeting. Selective note taking at the meeting will greatly assist this process. Concentrate on *conclusions*. Do not record controversy; state what was decided.

The way minutes are numbered varies from organisation to organisation. Here are three common methods:

consecutively, from the first meeting onwards

consecutively, beginning each set of minutes with '1'.

and consecutively, beginning each year with '1'.

Check that your minutes:

provide a true, impartial and balanced account of the proceedings;

are written in clear, concise and unambiguous language;

are as concise as is compatible with the degree of accuracy required;

follow a method of presentation which helps the reader assimilate the contents.

Once the minutes have been drafted, ask the chairperson to check them. Then circulate them to everyone who attended the meeting and also to anyone else who will be expected to act upon them. It is a good idea to clearly identify these people by putting their names in an 'action' column on the right of the page and opposite the appropriate references in the text.

If someone asks for a correction, try to negotiate an acceptable form of words. However do not be fooled by people who want you to report what they *should* have said, not what they *actually* said. At the following meeting these minutes will be discussed and any arguments over them will be resolved. The chairperson will then sign them as correct.

What Would be a Suitable Format?

Headings in the minutes of a meeting should broadly correspond with those which appear in its agenda, as follows:

1. Heading (including where and when the meeting was held)

2. Present (who was there)

3. Apologies for Absence (who should have been there, but was not)

4. Minutes of the Previous Meeting (note any corrections and state 'The minutes were accepted as a true record of the meeting [with the above corrections]')

5.
6.
7. } Simple statements of what actually occurred at the meeting
8.

9. Any Other Business (the 'leftovers') 10. Date of Next Meeting (also give the time and location)

Process Description Reports

A process is a specific series of actions that bring about a specific result.

What Points Should I Bear in Mind?

It is important not to confuse instructional manuals (see above) with process description reports. The former explain *how* a process is to be performed; the latter help the reader *understand* that process. Process description reports are used to describe the following:

how something is made

how something is done (for information, not instruction)

how a mechanism works

how a natural process occurs.

The report is essentially chronological or sequential and it is most commonly used within the world of business and industry. Almost every such report will include illustrations.

What Would be a Suitable Format?

A suitable format for a process description report would be as follows:

1. Contents page (with a separate list of illustrations)

2. Introduction (identify the process; record its purpose and significance; give an overview of the steps involved)

3. Main body (discuss each step in turn)

4. Summary (concentrate on the purpose and importance of the actions or the significance of the facts).

Progress Reports

These are periodic reports which, as their name suggests, describe how some activity or process is progressing. They are often built up from workers' daily logs, supervisors' reports, and so on.

What Points Should I Bear in Mind?

Progress reports will be required in one of three circumstances:

on a regular basis

at certain times during an activity or process

or as and when required.

They record progress over a specific period of time, and they make comparisons from period to period by identifying changes and their underlying causes and effects. They are essential for effective decision making so they must be clear, accurate and unambiguous.

What Would be a Suitable Format?

Most organisations have standard printed progress report forms, although headings vary considerably. Here is one simple format:

1. Introduction

the period of work covered the work planned the authority for the work the progress to date

2. Main Body

the work completed how the work has been completed

the work planned for the future an overall appraisal of the progress to date.

Research Reports

The purpose of a research report is to extend our understanding of the world by reducing uncertainty and increasing our understanding of it.

What Points Should I Bear in Mind?

Results alone are never enough. As you will see from the typical format described below, you must be able to assess and then evaluate the *reliability* of the results. You must say precisely how the work was carried out, what methods were used to collect the data, and how it was analysed. Conclusions and recommendations must be drafted with great care.

What Would be a Suitable Format?

This is a typical format for a research report:

1. Contents page

2. Introduction

> Set the scene; give a clear statement of the objectives and scope of the research.
>
> What was known about the subject at the beginning of the research?
>
> Put the project into its proper context.
>
> Give the reason(s) for the research.
>
> Discuss the events which led up to it.
>
> Assess the importance of other, related work.

3. Work carried out

> Describe the overall shape and design of the research.
>
> Describe the methods used (for example, sampling methods).
>
> Describe the actual work carried out, probably in chronological order.
>
> Explain how the results were analysed (for example, input to a computer).

4. The Results

> In an academic report, give full results (with an interpretation in a separate section).
>
> In a non-academic report, you can omit some results (or at least put them in an appendix) and emphasise significant results.
>
> Concentrate on each objective of the research in turn.
>
> Structure your results around these objectives.
>
> Discuss the results; form links; build up an overall picture.
>
> Distinguish 'facts' from interpretations, inferences, predictions or deductions.

5. Conclusions

> Make sure they flow naturally from the results.
>
> Each one must be supported by your findings and/or other research.

If no clear picture has emerged, then say so.

Do not see relationships that do not exist.

6. Recommendations

These should flow naturally from your conclusions, with no surprises.

7. Appendixes

Include items which would disturb the flow of the report (for example, survey forms and questionnaires).

Scientific Reports

A scientific report consists of an account of a test or experiment, of its findings, and of its conclusions.

What Points Should I Bear in Mind?

Before you can write the report, you must carry out the test or experiment accurately and you must record your results as you proceed. Here are some points to bear in mind:

Make sure you understand the purpose of the test or experiment.

If you are not familiar with the relevant theory, look it up before you start.

Make sure you select appropriate equipment with reference to its accuracy, sensitivity and safety. Ensure you know how the equipment works, and then set it up in the most sensible way for you to make all the required measurements and observations.

Carry out the test or experiment, recording *every* observation as you proceed. Ensure you observe and record accurately.

Always record the units of measurement. All readings must be consistent, for example to two decimal places.

There is no point in giving a reading of, say, 0.2317mm unless you have a good reason to believe that it lies somewhere between 0.231 and 0.232mm. If you do not have good reason to believe this, then record the result only to the degree of precision to which you have confidence perhaps 0.23mm.

Record the estimated limits of error. If a spring can measure with an accuracy of plus or minus 0.1mm, you should record this as, say,

$$\text{length of spring} = 21.7 \pm 0.1\text{mm}$$

If you add a mass to the spring and re-measure, the error could be plus or minus 0.1mm on both figures; so record this as, say,

$$\text{change of length of spring} = 14.9 \pm 0.2\text{mm}$$

Calculate the results and draw any necessary rough graphs in pencil. If the results are unreasonable or inconsistent (out of line), then make the tests again.

Form a conclusion based on your accumulated evidence.

Write the report.

What Would be a Suitable Format?

This is the usual format for a scientific report:

1. Name of class, group or department; experiment number; reference; date and time

   The time is relevant only if it is likely to affect results (for example, was barometric pressure a factor?).

2. Title of experiment

3. Summary (or Abstract or Synopsis)

   A brief statement about the structure of the report; why the experiment was carried out; what you found, and the significance of what you found.

4. Contents page

5. Introduction

   Your purpose and scope.

6. Apparatus

   A list of apparatus and details of its arrangements, with diagrams.

7. Circuit theory

   Where applicable. A brief account of the theory underlying the experiment.

8. Method

   A full and clear account of how the experiment was carried out. Write in the passive (A glass stopper was weighed).

9. Results (or Findings)

   All your readings neatly tabulated with graphs neatly drawn. Give the estimated limits of error (see above). If necessary use appendixes.

10. Conclusion (or Discussion)

   The inferences drawn from the results obtained (these results show . . .). Interpret results and explain their significance.

   Could this experiment have been improved in some way? If so, explain why and how.

11. Appendixes

   To support section 9, if necessary.

Student Project Reports

Many students are required to undertake projects and produce reports. For example, they are an important part of many GCSE examination schemes.

What Points Should I Bear in Mind?

Here are some points to bear in mind when carrying out a project:

Be aware of who will choose the topic. It may be chosen by your teacher, or by you, or through discussion between the two of you.

The topic chosen must be acceptable to your examining group. So talk to your teacher and refer to your syllabus. Then select a suitable topic, preferably one that can be investigated locally.

Decide what sources of information you will require.

Decide how you will gather this information.

Gather the information.

Analyse the information.

Write the report.

If you want to know more about student project reports, refer to Chapters 9 and 10 of *How to Succeed at GCSE*, John Bowden (Cassell, 1989).

What Would be a Suitable Format?

If your teacher tells you the required format, or if it is given in your syllabus, comply with it. If you have no such instruction or guidance, consider this simple format:

1. Contents page ⎤
2. Introduction   ⎦→ Beginning
3. Main body   Middle
4. Conclusions   ⎤
5. Recommendations (where appropriate) ⎥→ End
6. Appendixes   ⎥
7. Sources   ⎦
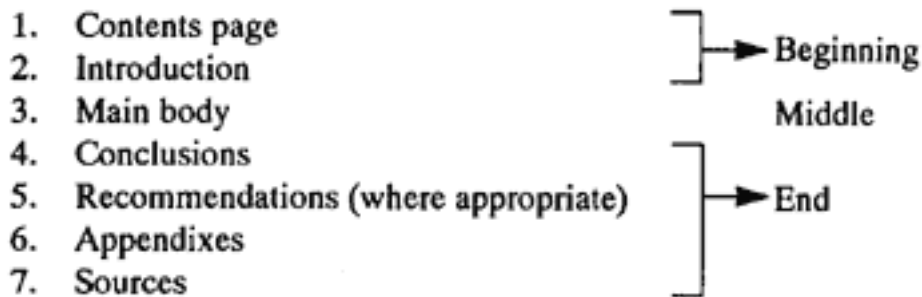
See also Technological Reports.

Systems Evaluation Reports

A systems evaluation report serves one of these purposes:

To discover which system out of several alternatives is most suitable for a particular application.

To test an apparatus or system which it is intended to employ on a large scale, or with multiple applications, if the initial operation is deemed worthwhile.

To enquire into the causes of failures in an existing operational system.

The last of these is considered under Trouble-Shooting Reports.

What Points Should I Bear in Mind?

The purpose of the first two types of report is to inform those concerned with selection, implementation and utilisation about:

the requirements of the application

the criteria by which the systems should be judged

the features of available systems

data on their performance in the field

and recommendations or conclusions about the best course of action.

These reports are important mistakes are costly. You must be independent; do not rely on the word of manufacturers or suppliers. You probably will need to use supplementary text, footnotes, a glossary and illustrations (diagrams, flow charts and perhaps photographs).

What Would be a Suitable Format?

A suitable format for a report with the purpose of discovering which system out of several alternatives is most suitable for a particular application is as follows:

1. Contents page

2. Preface (personal background: why have you written the report?)

3. System Requirements

4. Systems Available

5. Criteria for Selection

6. The Final Choice

7. Appendixes (System Data Sheets).

A report on the initial performance of an apparatus or a system could follow this format:

1. Contents page

2. Preface (personal background: why have you written the report?)

3. Apparatus/System Requirements

4. Apparatus/System Performance (use appendixes, if necessary)

5. Conclusions

6. Recommendation

7. Appendixes (to support section 4, if necessary).

See also Feasibility Reports and Trouble-Shooting Reports.

Technical Reports

Technical reports are often written at an early stage in a production process. They are usually generated internally, either by the technical publications department of an organisation or by staff involved in this production process. Here are some examples of technical reports:

a technical proposal

a feasibility study

design and research reports

pre-production reports

evaluation documents

ad hoc reports.

What Points Should I Bear in Mind?

These reports are often written by engineers who are not always familiar with the techniques of effective writing. The advice given throughout this book, therefore, will be of assistance. If you wish to read more about this wide yet specialised area of report writing, refer to *A Beginner's Guide to Technical Writing*, John Evans (Newnes Technical Books, 1983).

What Would be a Suitable Format?

Every organisation will have its own format requirements. This is a typical layout:

1. Contents page

2. Aims (why it was written, its terms of reference and its general purpose)

3. Summary (the salient facts and a concise summary of conclusions, if any)

4. Main body (main discussion of the subject matter)

5. Conclusions (if necessary)

6. Bibliography (if required)

7. Index (in larger reports only).

Technological Reports

A technological report is concerned with the application of practical or mechanical sciences in order to achieve a desired aim.

What Points Should I Bear in Mind?

A good technological report should combine and demonstrate these qualities:

planning

communication

ability to reason

ability to evaluate

a logical and realistic solution.

Show the 'thinking' that has gone into the report. Make sure it is well organised and well-presented. Present it logically to show a well-constructed development of the problem-solving process. Reach a solution which achieves your objective. Evaluate your work: are you satisfied with it? Is it economically viable?

What Would be a Suitable Format?

Here are three formats. As always, select the one that best suits your needs:

Format A

1. Contents page

2. Brief (what you were attempting to do)

3. Analysis (your analysis of the problem include the research material you have gathered)

4. Thinking (your initial thinking and your evaluation of it)

5. Solution (explain how you developed your solution)

6. Evidence (include drawings, photographs and other evidence of your solution the artefact)

7. Evaluation (an objective evaluation of your solution).

This format would be suitable for a Student Project Report about the

production of an artefact (a physical thing created by one or more human beings, such as a working model or a piece of woodwork).

Format B

1. Contents page

2. Purpose

    why was the work undertaken?

3. Methods Used

    the apparatus and equipment used (with illustrations)

    a step-by-step account of the procedure

    observations taken (tabulated) use appendixes, if necessary

    calculations necessary to give meaning to the observations

4. Results

    use tables and illustrations (and appendixes, if necessary)

5. Conclusions

    a survey of the work undertaken:

    compare actual results with theoretical results

    compare actual results with others obtained elsewhere

    give reasons for such discrepancies or variations

    assess the relevance of the methods used

    assess the efficiency of the equipment used

    discuss any human errors and/or any relevant environmental factors

6. Recommendations

    flowing naturally from your conclusions

7. Appendixes

    to support sections 3 and/or 4, if necessary.

Format C

1. Contents page

2. Summary

    concentrate on your findings

3. Object

a brief statement of your aim

4. Introduction

why was the work undertaken?

provide any relevant background information

discuss any limitations/conditions you faced (for example: cost, time, or environmental)

5. Apparatus

describe it (with illustrations)

why was it chosen?

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6. Procedures

   a step-by-step account of what was done

7. Observations

   give details of components, specimens, equipment or machinery during and after the test

   record the readings made during the investigation in tables and/or illustrations use appendixes, if necessary

8. Calculations

   based on your observations

   based on theoretical considerations

   analyse errors

   summarise your results

9. Results

   use a separate section or appendix, if necessary

10. Comments

   discuss the degree of accuracy achieved

   compare your results with those from other sources

   comment on quality of the materials and workmanship of the item tested

   what alternative method(s) of presenting your findings could you have used?

   why did you present your findings as you have?

   make your acknowledgements

11. Conclusions

   flowing from your results and, where appropriate, your comments

12. Recommendations

   flowing from your conclusions

13. Appendixes

   to support sections 7 and/or 9, if necessary

14. Index

   in larger reports only.

Formats B and C are suitable for technological tests or investigations, perhaps assessing the suitability of two or more items for a defined purpose. Format C is particularly useful for a long report. See also Comparative Testing Reports.

Trouble-Shooting Reports

These reports aim to locate the cause of some problem, and then suggest

ways to remove or treat it. In the main they deal with people, organisations or hardware.

What Points Should I Bear in Mind?

These reports highlight problems. When they are caused by people you must be especially careful to word the report thoughtfully. Be candid but be fair. Most of all, be accurate. When you are discussing problems caused by the structure of an organisation, you must expect to meet the objection: 'But we've always done it this way'. People are generally not keen on change. Reports on hardware are less complicated and often less contentious.

What Would be a Suitable Format?

Here are four possible structures. Choose the one that best suits your needs:

Format A

1. Contents page

2. Present situation (the salient points)

3. Options for Change (the pros and cons of each option)

4. Recommendations (well-argued, clear, unambiguous and concise)

5. References (if required).

Format B

1. Contents page

2. Introduction (purpose and scope)

3. Evidence (concise, balanced and unambiguous use appendixes, if necessary)

4. Arguments for (present all the pros logically and objectively and respond positively to weaknesses in your case)

5. Arguments against (list them and refute them in turn)

6. Recommendation (be clear, unambiguous and precise)

7. Appendixes (to support section 3, if necessary).

Format C

1. Contents page

2. Introduction (your purpose)

3. Summary of Recommendations (clear, unambiguous and precise)

4. Present Position (the salient points)

5. Scope (what work was done, and possibly what was not)

6. Observations on Recommendations (the main body repeat each

recommendation and give the main pros and cons for each say why the pros prevailed)

7. Conclusion (keep it brief)

8. Appendixes (if required).

Format D

1. Contents page

2. The Problem

    nature and cause

    extent

    effects (perhaps on safety or production)

3. The Need for Change

    reasons (perhaps labour problems or competition)

4. Proposed Solution

    options available

    details of proposed solution

    previous experience of this scheme (perhaps elsewhere)

    advantages

    disadvantages (and how they can be overcome)

    effects (perhaps improved efficiency or sales prospects)

5. Time Factors

    when can it be implemented?

6. Costs

    for *each* option:

    implementation costs

    running costs

    estimated savings, if applicable

7. Conclusion

    for the *chosen* option:

    overall effects

    overall benefits

8. Recommendations

> item by item, clear and unambiguous

9. Appendixes

> if required.

See also Feasibility Reports and Systems Evaluation Report.

GLOSSARY

A

Abstract (or Summary, or Synopsis). A condensed version of a report which outlines the salient points and emphasises the main conclusions (*qv*) and, where appropriate, the main recommendations (*qv*). It has two functions: either to provide a précis of what the recipient is about to read, or has just read; or to provide a summary of a report if the recipient is not going to read all of it.

Acknowledgements. An author's statement of thanks to people and organisations who helped during the preparation of a report.

Addendum (*pl.* Addenda). Additional material; an update or afterthought often produced and circulated after a report has been issued.

Agenda. A type of report listing items to be discussed during a meeting. Therefore it must be drawn up in advance.

Aims. A statement of why a report was written; who requested it, when it was requested; and its terms of reference (*qv*). It usually appears in the introduction (*qv*).

Algorithm. A flowchart (*qv*) which will answer a question, or solve a problem, or undertake a procedure within a finite number of steps.

Annual Report. A type of report which lists the achievements and failures of an organisation; a progress report (*qv*) in which every department is accounted for.

Appendix (*pl.* Appendixes or Appendices). A section of a report which gives details of matters discussed more broadly in the main body (*qv*). It provides additional information for readers who require it without breaking the thread of argument in the main body for readers who do not.

Appraisal report. A type of report which evaluates a person's performance in his or her current job; identifies methods of improving this performance; and often assesses suitability for another job, promotion and/or a change in salary.

Artwork. The images in a report, such as clip art (*qv*), original art or photographs.

Audit report. An external audit report is addressed to shareholders and contains an independent assessment of whether a company's final statements provide a true and fair view of its affairs. An internal audit report is addressed to the management of a company for which the auditor is employed, and is more concerned with segregation of duties and internal control.

B

Bar chart. A method of presenting figures visually. Very useful for illustrating relationships between items.

Bias. Errors that occur in statistical sampling (*qv*) if the sample is not random (*qv*) or if the questioning is not objective and consistent. See Leading question.

Bibliography. A full list of books and other material used in the preparation of a report. Unlike a reference section, it may also include publications not referred to in the report, but considered potentially valuable or of interest to readers *cf* References.

Binding. The process of assembling the pages of a report in order and then enclosing them within covers.

Bitmap. A computer image, like a colour photograph *cf* vector.

Bulleting. A method of highlighting (*qv*) important text (*qv*) by indenting (*qv*) it and placing a bold dot or bullet in front of the first word.

C

Caption (or Legend, or Underline). Descriptive words or lines accompanying an illustration (*qv*).

Centring text. A method of refining the appearance of text (*qv*) where each line is placed centrally between the right and left margins. This can be used for whole blocks of text but is more frequently applied to headings (*qv*).

Circulation list. See Distribution list.

Clip art. Illustrations (*qv*) available commercially in digital form.

Column. A format (*qv*) using one, two, or three vertical groupings on a page.

Comparative testing report. A type of report which tests similar items, assessing each against a number of well-defined standards, and reaching logical conclusions (*qv*) and recommendations (*qv*) about which are the best and/or which represent the best value for money. The Consumers' Association *Which?* magazine contains such reports.

Components. The various sections which collectively make up a report.

Conclusions. A section of a report where the author links the terms of reference (*qv*) with the findings, as presented in the main body (*qv*), and reaches clear, simply stated and objective conclusions (*qv*) that are fully supported by evidence and arguments and which come within and satisfy the terms of reference.

Confidentiality. The degree to which the availability of a report is restricted. Reports are often classified as confidential when they contain politically or industrially sensitive information or comment, or when they discuss personnel. Confidential reports should be stamped as such on the title page (*qv*) and should be kept under physically secure conditions.

Contact point. The name, address and telephone number of a person the reader can contact if further enquiry or comment is required. It should be given in a report's covering letter (*qv*).

Contents page. A list of the various sections of a report in the order in which they appear, with the appropriate page and/or paragraph numbers alongside them. If there are more than just one or two illustrations (*qv*) they should be listed separately below the main contents, giving their captions (*qv*), figure numbers and page and/or paragraph numbers.

Copyright. Legal protection against the use of literary or artistic property without permission. The protection afforded by English law lasts for the duration of the author's life and fifty years thereafter. Copyright is different from a patent in that it cannot exist in an idea, but only in its expression.

Covering letter. An explanatory letter accompanying a report and including a contact point (*qv*).

Creative substructure. A substructure (*qv*) where information is presented in an apparently haphazard way. A hybrid of the logical substructure (*qv*) and the sectional substructure (*qv*).

Cross-reference. A method of directing readers to another part of a report for related information.

Cut-away drawing. A pictorial method of illustrating what something looks like. An object is shown with part or all of its outer casing cut away to reveal its internal components.

D

Desktop Publishing (DTP). The use of a personal computer system as an inexpensive production system for generating typeset-quality text (*qv*) and graphics (*qv*). Desktop publishers often merge text and graphics on the same page and print pages on a high resolution laser printer or typesetting machine *cf* Word processing.

Digital. A format (*qv*) used by a computer system that scans the image into computer bits.

Distribution list (or Circulation list). A list of people who will see a report; its readership (*qv*). It usually appears on the title page (*qv*).

Double spacing. Double the usual space between each line of text (*qv*). It helps a typist or printer read a manuscript (hand written) report; it makes it easier to correct and amend drafts (*qv*); and it can help

readers of a report. Other line spacings include 0, 1/2, 11/2, 21/2 and 3. Obviously the choice will affect the number of lines on a page.

Double striking. A method of emphasising text where the printer overprints the text twice, thereby making the word, phrase, sentence, etc. bold.

Draft. An early version of a report drawn up for initial consideration.

Duty notes report. A type of report which explains how a job is to be performed.

E

End matter. The pages of a report after the main body (*qv*) *cf* Prelims.

Enhanced modern format. An ultra-modern format (*qv*) of report with the additional features of added and manipulated images *cf* Modern format and Traditional format.

Explanatory report. A type of report which provides a factual account of something that has happened. More specific than an informative report (*qv*).

Exploded drawing. A pictorial method of illustrating what something looks like. The components of an object are shown in assembly as if they were spread out along an invisible axis.

F

Feasibility report. A type of report which discusses the practicality, and possibly the suitability and compatibility of a given project, both in physical and economic terms. It must come to a conclusion (*qv*) and must recommend (*qv*) that some action is taken or is not taken and/or that some choice is adopted or is rejected.

Flowchart. A diagrammatic representation of the sequence of operations in a natural, industrial or organisational system.

Font. A set of characters (the alphabet, numbers and symbols) in one weight and style of typeface (*qv*).

Footers. Identifying information placed at the bottom of each page of a report *cf* Headers.

Footnote. A note or reference (*qv*) placed at the foot of the relevant page; at the end of the relevant section; or towards the end of a report.

Foreword. An introductory section of a report, similar to a preface (*qv*) and an introduction (*qv*), but usually written by someone other than the author of the report.

Format. The general appearance of a report including type style, paper, binding (*qv*), covers, layout (*qv*), shape and size.

Front matter. See Prelims.

G

Glossary (of Terms) (or Gloss). An alphabetical list of unfamiliar difficult, specialised or technical words and phrases, acronyms and abbreviations used in a report.

Gluing. A method of binding (*qv*) a report where the sheets are glued and fixed into the spine of a fabric, card or plastic cover.

Go live. To actually undertake a statistical survey (or to operate a system), as distinct from pilot testing (*qv*) it.

Graph. A method of presenting figures visually. Particularly useful for illustrating detailed relationships between items or to show a trend over time.

Graphics. Image enhancements, such as lines, boxes and background used to create interesting and appealing visual design.

H

Headers. Identifying information placed at the top of each page of a report *cf* Footers.

Heading. A means of identifying and labelling a block of type. It should be specific; comparatively short; expected, or at least easily interpreted; and should cover all the ground collectively. It should be more prominent than a subheading (*qv*), but less prominent than the title (*qv*). Headings of similar rank should introduce topics of roughly equal importance.

Highlighting. Drawing attention to important parts of the text (*qv*) by methods other than headings (*qv*) eg using upper case or changing spacing (*qv*).

House-style. A consistent style of report writing developed by and used within an organisation.

I

Illustration. A pictorial representation of information as distinct from text (*qv*). Every illustration should have a caption (*qv*) and figure number and must be referred to in the text. If there are more than just one or two illustrations, they should be listed separately on the contents page (*qv*).

Indentation. A method of refining the appearance of text (*qv*) where the beginning of a line is inset a number of spaces to indicate a new paragraph; for emphasis; or to break up a large passage.

Index. An alphabetical list of items discussed in a report together with their page and/or paragraph numbers. An index should contain more entries than a contents page. Necessary only in a large report.

Indexing. A method of improving the presentation of a report and a way of helping readers find their way around it. The various sections or subsections are separated and distinguished, perhaps by means of overlapping pages or protruding selfadhesive labels.

Informative report. A type of report which increases the readers' knowledge of an event or brings them up to date. More general than an explanatory report (*qv*).

Instructional manual. A type of report which explains how a process (a specific series of actions that bring about a specific result) is to be performed *cf* Process description report.

Internet. The most famous computer network (*qv*) which connects

thousands of smaller networks and millions of users all around the world.

Interview report. A type of report which forms the framework of an interview (although it must not dictate it), and which records facts and opinions about a candidate in a consistent format to facilitate subsequent evaluation and comparison with other candidates.

Introduction. A section of a report which sets the scene. It states the author's intentions the terms of reference (*qv*) and gives the aims (*qv*) and scope (*qv*) of the report. An introduction must include everything the readers will need to know before they read the rest of the report.

Investigation into the financial affairs of a company report. A type of report concerned with some specific aspect of a company's financial affairs as defined by the terms of reference (*qv*) and/or by statutory regulations.

Isometric drawing. A pictorial method of illustrating what something looks like. Easy to draw but the lack of perspective makes the object look peculiar.

J

Justification. A method of refining the appearance of text (*qv*) where both the left and the right-hand edges are straight.

K

KISS. Stands for Keep It Short and Simple. A very useful principle in all aspects and in all stages of report writing.

L

Landscape. A page orientation (*qv*) where printing is aligned horizontally on the long edge of the paper *cf* portrait.

Layout. The arrangement of illustrations (*qv*) and text (*qv*).

Leading question. A question phrased so as to suggest the answer expected. In statistical sampling (*qv*) it leads to a bias (*qv*) in the results obtained. Therefore it must be avoided.

Legend. See Caption.

Libel. A false statement of a defamatory nature about another person that tends to damage his or her reputation and which is presented in a permanent form, such as in writing.

Logical substructure. A substructure (*qv*) where procedures or events are discussed in the *sequence* in which they occur or occurred.

Lower case. Non-capital letters *cf* Upper case.

M

Main body. The section of a report which contains the main discussion on the subject-matter as defined by the terms of reference (*qv*).

Minutes. A type of report which provides a record of business transacted at a meeting. It may well have some legal and authoritative force.

Modern format. A report which takes advantage of the ability to add lines and boxes, change font size (*qv*) and use italics. Otherwise it is

basically like a traditional format (*qv*) *cf* Enhanced modern format and Ultra-modern format.

N

Network. A collection of telecommunications equipment and transmission lines, used to interconnect devices, such as computers, at different locations so they can exchange information.

Numbering system. A method of identifying the various components of a report for reference and indexing (*qv*) purposes. Keep it simple.

O

Organisational chart. A diagram which depicts the hierarchy of, and the lines of command within, an organisation.

Orientation. Whether the print of a report is aligned horizontally on the long edge (landscape, *qv*) or vertically on the short edge (portrait, *qv*) of the paper.

Orthographic drawing. A pictorial method of illustrating something. It shows the back, front and side elevations of an object. Of little use where the reader needs to know what it actually looks like.

P

Pareto principle. 80% of what is important is represented by 20% of what exists. Not to be taken literally, but a very useful general concept to consider during all stages of report writing.

Patterned notes. A method of note taking based on the formation of visual links between facts and ideas, both already known and to be discovered. A very useful way of planning a report, as distinct from writing it *cf* Traditional notes.

Perspective drawing. A pictorial method of illustrating what something looks like. It shows what an object actually looks like. Often difficult to draw.

Pictogram. A method of presenting figures visually by the use of symbols. Very useful for illustrating relationships between items.

Pie chart. A method of presenting figures visually. Very useful for illustrating relative proportions or how the total pie is divided up.

Pilot test. An initial test of a questionnaire (*qv*) or other statistical device among a small number of respondents (*qv*) (or an initial test of a new system) to highlight any obvious errors, omissions, ambiguities or other shortcomings before it goes live (*qv*).

Plastic gripper. A method of binding (*qv*) a report by placing a plastic slide grip along the left hand edge of the assembled covers and sheets.

Population. The total number of people or items within a defined group.

Portrait. A page orientation (*qv*) where printing is aligned vertically on the short edge of the paper *cf* landscape.

Preface. An introductory section to a report. Often used to convey some *personal* background details behind the production of a report.

Prelims (or Preliminaries, or Front matter). The pages of a report before the main body (*qv*) *cf* End matter.

Probability theory. A statistical concept concerned with the effects of chance on an event, experiment, or observation. The basis of statistical sampling (*qv*).

Process description report. A type of report which helps readers understand a process (a specific series of actions that bring about a specific result) *cf* Instructional manual.

Progress report. A type of report which describes how some activity or process is advancing.

Proofreading. Checking and making corrections on a document prepared by a typist or printer. It is very important to identify and correct spelling mistakes and errors and inconsistencies in layout before a report is reproduced and issued.

Q

Questionnaire. A method of gathering information by questioning respondents (*qv*).

Quota sampling. A method of statistical sampling (*qv*) used to obtain a *balanced* view from people based on their sex, age and possibly social class. However, *within* every defined group or population (eg Females, aged 2130; or Males, aged 4150), the sample is random.

R

Random sample. In statistical sampling (*qv*), each member of the population has an equal chance of being selected.

Readership. The people who will read a report, as listed on the distribution list (*qv*). The report is written for them so they must be given the information they need and in a form that they can understand without undue effort.

Recommendations. A section of a report where the author states what specific actions should be taken, and by whom and why, given the terms of reference (*qv*), the findings as presented in the main body (*qv*), and the conclusions (*qv*) reached. Recommendations therefore must look to the future and should always be realistic. Do not make them unless they are required by the terms of reference.

Reference number. A unique number allocated to a report. It should appear on the title page (*qv*).

References. A section of a report which provides full details of publications mentioned in the text (*qv*), or from which extracts have been quoted *cf* Bibliography.

Report. A document produced to convey information to a specific audience at a certain moment in time.

Research report. A type of report which extends our understanding of the world by reducing our uncertainty and increasing our comprehension of it.

Respondent. A person who answers questions, perhaps posed in the form of a questionnaire (*qv*).

Ring binding. A method of binding (*qv*) a report where a special machine perforates the binding edge and then threads the binding through the holes in the covers and the report. Looks very professional.

S

Saddle stitching. A method of binding (*qv*) a report by means of thread or wire through the fold. See Stitching.

Sampling. See Statistical sampling.

Scientific report. A type of report which gives an account of a test or experiment together with findings and conclusions (*qv*).

Scope. A statement of what was done, and perhaps what was not done and why it was not done if the readers could reasonably have assumed that it would have been. It may also include discussion on the resources available to and utilized by the report writer; the sources of information (*qv*); the working methods employed; and the structure (*qv*) of the report. It usually appears in the introduction (*qv*).

Sectional substructure. A substructure (*qv*) where information is presented in meaningful sections, eg the work of each department in turn or each engineering or clerical function in turn.

Simple random sampling. A method of statistical sampling (*qv*) where every person or item in a population has an equal chance of being selected, eg take ten names out of a hat.

Skeletal framework. An initial overall plan of the structure (*qv*) of a report. A well-planned skeletal framework is the key to effective report writing. It may be revised at any stage(s) during the preparation of the report.

Source (of information). Any person, book, organisation etc supplying information or evidence (specially of an original or primary character) used in a report.

Spacing. See Double spacing.

SQ3R. A method of reading. Stands for Survey, Question, Read, Recall, Review. The way you read should vary according to the complexity of the material and the reasons for reading it.

Statistical sampling. A method of drawing conclusions about a population by testing a representative sample of it. It is based on probability theory. See Quota sampling; Simple random sampling; and Systematic random sampling.

Stitching. A method of binding (*qv*) a report where sheets are folded in the middle to make two single-sided or four double-sided pages, and are then bound by saddle stitching (*qv*).

Structure. The arrangement of the components which collectively make up a report.

Subheading. A means of more specifically and precisely identifying and labelling a block of type which comes under an overall heading

(*qv*). Do not use too many subheadings; if necessary re-structure the report to have more headings. Make the subheadings less prominent.

Substructure. The arrangement of material within each of the components of a report, although often applied specifically to the main body (*qv*). See Logical substructure; Sectional substructure; and Creative substructure.

Subtitle. A secondary title expanding the main title (*qv*).

Summary. See Abstract.

Synopsis. See Abstract.

Systems evaluation report. A type of report that evaluates which system out of several alternatives is most suitable for a particular application; or which tests an apparatus or system with a view to possible large scale employment or multiple applications; or which enquires into the causes of failures in an existing operational system. When it serves the last of these purposes, it is sometimes referred to as a trouble-shooting report (*qv*).

Systematic diagram. A visual method of illustrating how items within a system are *connected* to one another, eg the map of the London Underground shows how stations are connected.

Systematic random sampling. A method of statistical sampling (*qv*) where every person or item in a population has an equal chance of being selected, but the choice is made to a prearranged plan, eg every 100th name on the electoral register.

T

Tally sheet. A sheet used to mark or set down, and later to total, the number of observations of specified items; or to mark or set down, and later to total, the various answers given by all respondents (*qv*) to a questionnaire (*qv*).

Technical report. A type of report often written at an early stage in a production process.

Technological report. A type of report which is concerned with the application of practical or mechanical sciences in order to achieve a desired aim.

Terms of Reference (T of R). A concise statement of precisely what a report is about. It is essential that these are known/agreed before any work is undertaken and they should be referred to in the introduction (*qv*).

Text. The words of a report as distinct from its illustrations (*qv*).

Title. The overall heading (*qv*) of a report; a restatement of the terms of reference (*qv*), but usually using different words. It should be clear, concise, relevant and unique and should be more prominent than any other heading which appears in the report.

Title page. A sheet at the beginning of a report which bears the main

title (and subtitle [*qv*], where appropriate); the reference number (*qv*), the name of the author; and other important information. Every report should have a title page.

Traditional format. A report produced on a typewriter *cf* Enhanced modern format, Modern format and Ultra-modern format.

Traditional notes. A method of note taking where relevant material is condensed using headings (*qv*) and subheadings (*qv*), with the most important points and arguments being highlighted (*qv*). This method is also the basis of report writing, as distinct from report planning *cf* Patterned notes.

Treasury tag. A simple method of binding (*qv*) a report. Holes are made in the pages and covers using a punch and then tags are inserted. Useful where amendments and/or inserts such as maps and plans are expected.

Trouble-shooting report. A type of report which locates the cause of some problem, and then suggests ways to remove or treat it. It can deal with people or organisations; or hardware or systems, where it is sometimes referred to as a systems evaluation report (*qv*).

Typeface. A specific type design, such as *Times New Roman* or *Rockwell*.

Typography. The art and style of printing.

U

Ultra-modern format. A modern format (*qv*) of report with the additional feature of two or more columns *cf* Enhanced modern format and Traditional format.

Underline. See Caption.

Upper case. Capital letters *cf* Lower case.

V

Vector. A type of computer image created from lines and shapes *cf* Bitmap.

W

White space. The empty space on a page.

Word processing. The use of a personal computer system to enter text from a keyboard, import it from a file, or open a 'standard' document and then edit, format, save or print it. As well as offering tools for basic graphic (*qv*) embellishments, most word processors allow graphics and tabular information to be imported from other programs *cf* Desktop publishing (DTP).

Working papers. Notes recording the detailed information, evidence, findings and sources (*qv*) that will form the basis of the main body (*qv*), and of any appendixes (*qv*). Therefore they must be complete and accurate.

Wysiwyg. An acronym meaning *what you see is what you get*. In other words, what you see onscreen is an accurate representation of how the report will print out.

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FURTHER READING

A good dictionary is an essential tool for any writer expecting his or her work to be read by others. Chambers, Collins, Longman and Oxford University Press each offers a comprehensive range to suit every need and every pocket.

The Complete Plain Words, 2nd edition, Sir Ernest Gowers (Penguin 1987). An excellent guide to using plain English and avoiding jargon.

Copyediting: The Cambridge Handbook, 2nd edition, Judith Butcher (Cambridge University Press 1981). An authoritative text used by professional publishers and their editors.

Dictionary of Modern English Usage, 2nd edition, H.W. Fowler, revised by Sir Ernest Gowers (Oxford University Press 1965). A classic guide to English usage, full of fascinating information.

How to Publish A Newsletter, Graham Jones (How To Books 1995). A complete step-by-step handbook which covers all the basics from editing right through to publication.

How to Write and Speak Better (Readers Digest Association Ltd. 1991). Excellent but expensive.

Improving Your Written English, Marion Field (How To Books, 1997).

Learn to Draw Charts and Diagrams Step-by-Step, Bruce Robertson (Macdonald Orbis 1988). It starts with basic pie charts and ends with sophisticated computer graphic programs.

Mastering Business English, Michael Bennie (How To Books 1996). A very practical, straightforward and comprehensive book illustrated with numerous examples.

Mind the Stop, G.V. Carey (Penguin 1971). Everything you ever wanted to know about punctuation.

The Handbook of Non-Sexist Writing for Writers, Editors and Speakers, Casey Miller and Kate Swift (Women's Press 1989).

The Oxford Dictionary for Writers and Editors (Oxford University Press 1981).

The Oxford Writers' Dictionary, compiled by R.E. Allen (Oxford University Press 1990).

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Roget's Thesaurus. You cannot find a word you have forgotten or do not know in a dictionary. Look up a word of similar meaning in Roget and you will find a variety of words and expressions which should include the one in the back of your mind, or perhaps an unfamiliar word which, when checked in a dictionary, proves even more appropriate. There are many versions available, including a revision by E.M. Kirkpatrick (Longman 1987).

Titles and Forms of Address A Guide to Their Correct Use, 19th edition (A. & C. Black 1990).

Writing for Publication, 4th edition, Chriss McCallum (How To Books 1997). A really writer-friendly introduction for everyone wishing to write articles, books, dramatic or other works.

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