

WRITING BUSINESS REPORT AND PROPOSALS

Deciding on Format and Length

- ▣ Preprinted form
- ▣ Letter
- ▣ Memo
- ▣ Manuscript

Choosing the Direct or Indirect Approach

The direct approach saves time and makes the report easier to understand by giving readers the main idea first.

The indirect approach helps you overcome resistance by withholding the main idea until later in the report; however, carefully consider length before choosing it.

THE DIRECT APPROACH

Since the company's founding 25 years ago, we have provided regular repair service for all our electric appliances. This service has been an important selling point as well as a source of pride for our employees. However, we are paying a high price for our image. Last year, we lost \$500,000 on our repair business.

Because of your concern over these losses, you have asked me to study the pros and cons of discontinuing our repair service. With the help of John Hudson and Susan Lefkowitz, I have studied the issue for the past two weeks and have come to the conclusion that we have been embracing an expensive, impractical tradition.

By withdrawing from the electric appliance repair business, we can substantially improve our financial performance without damaging our reputation with customers. This conclusion is based on three basic points that are covered in the following pages:

- It is highly unlikely that we will ever be able to make a profit in the repair business.
- Service is no longer an important selling point with customers.
- Closing down the service operation will create few internal problems.

THE INDIRECT APPROACH

Since the company's founding 25 years ago, we have provided repair service for all our electric appliances. This service has been an important selling point as well as a source of pride for our employees. However, the repair business itself has consistently lost money.

Because of your concern over these losses, you have asked me to study the pros and cons of discontinuing our repair service. With the help of John Hudson and Susan Lefkowitz, I have studied the issue for the past two weeks. The following pages present my findings for your review. Three basic questions are addressed:

- What is the extent of our losses, and what can we do to turn the business around?
- Would withdrawal hurt our sales of electrical appliances?
- What would be the internal repercussions of closing down the repair business?

Structuring Informational Reports

Reader reaction is rarely an issue in informational reports

Topical Organization:

- ▣ Importance
- ▣ Sequence
- ▣ Chronology
- ▣ Spatial orientation
- ▣ Geography
- ▣ Category

Structuring Analytical Reports

- ▣ Focusing on conclusions
- ▣ Focusing on recommendations
- ▣ Focusing on logical arguments

Focusing on recommendations

▣ Unfold recommendations in steps;

1. Establish the need for action in the opening, generally by briefly describing the problem or opportunity.
2. Introduce the benefit that can be achieved, without providing any details.
3. List the steps (recommendations) required to achieve the benefit, using action verbs for emphasis.
4. Explain each step more fully, giving details on procedures, costs, and benefits.
5. Summarize the recommendations.

Effective Outline of an Analytical Report Focusing on Conclusions

MEASURING QUALITY IMPROVEMENTS

- I. Introduction
- II. Conclusion: Outsourcing employee training has reduced costs and improved quality
- III. Cost reductions
 - A. Set cost reduction goal at 15 percent over the first year
 - B. Achieved actual reduction of 22 percent
 - C. Reassigned the three staffers who used to work on training full-time
 - D. Reduced the management time needed to oversee training
 - E. Sold the computers that used to be reserved for training
- IV. Quality improvements
 - A. Employees say they are more confident in 7 out of 10 key skill areas
 - B. Measurable mistakes have dropped by 12 percent
- V. Areas needing improvement
 - A. Two trainers received approval ratings below 80 percent
 - B. The outside trainers aren't always up to speed on internal company issues
 - C. We've lost some flexibility for scheduling courses
- VI. Summary

States the conclusion first: The outsourcing was successful because it met most of the goals established for the program

Does not ignore the lack of improvement in employee confidence in three areas

Emphasizes what's being done to bring employee confidence numbers up

Explores the two categories of goals: cost reductions and quality improvements

Discusses some areas of concern

Main Idea: We should move into the commercial irrigation equipment market but not into the residential market.

- I. Introduction
- II. Criteria for entering new markets
 - A. Size and growth
 - B. Profit potential
 - C. Ability to compete
 - D. Distribution costs and opportunities
 - E. Fit with current capabilities
- III. Irrigation equipment trends
 - A. Water shortages leading to demand for more efficient irrigation
 - B. Labor costs encouraging automation
 - C. More homeowners attempting do-it-yourself projects
- IV. Comparison of new market opportunities
 - A. Commercial landscapers and building owners
 1. Size and growth
 2. Profit potential
 3. Ability to compete
 4. Distribution costs and opportunities
 5. Fit with current capabilities
 - B. Residential landscapers and homeowners
 1. Size and growth
 2. Profit potential
 3. Ability to compete
 4. Distribution costs and opportunities
 5. Fit with current capabilities
- V. Recommendations
 - A. Enter the commercial segment
 1. Select a test market
 2. Learn from the test and refine our approach
 3. Roll out product marketing nationwide
 - B. Do not attempt to enter the residential market at this point

Defines the criteria for evaluating and choosing the market opportunities

FIGURE 11-5

Effective Outline of an Analytical Report Using the Yardstick Approach

Structuring Analytical Reports

The direct approach is common for solicited proposals; the indirect approach is more common for unsolicited proposals.

✓ CHECKLIST: Organizing Business Reports and Proposals

Decide on Format and Length

- ✓ Use preprinted forms only when requested to do so.
- ✓ Use letter format for brief external reports.
- ✓ Use memo or manuscript format for brief internal reports.
- ✓ Follow company guidelines.
- ✓ Choose a report length that matches your subject, your purpose, and your audience's expectations.

Choose an Organizational Approach

- ✓ Use direct order only when your credibility is high.
- ✓ Use direct order for informational reports to receptive readers.
- ✓ Use direct order for analytical reports to receptive readers.
- ✓ Use indirect order for analytical reports to skeptical or hostile readers.

Choose a Structure that Matches the Situation and Reader Needs

- ✓ For informational reports, use one of six topical arrangements: importance, sequence, chronology, spatial orientations, geography, and category.
- ✓ For analytical reports to receptive audiences, focus on conclusions or recommendations.
- ✓ For analytical reports to skeptical audiences, focus on one of three logical arguments: $2 + 2 = 4$ (to determine that everything adds up), the scientific method (to reveal the most effective solution), or the yardstick approach (to weigh possible solutions against criteria).
- ✓ For solicited proposals, use the direct approach, and focus on recommendations.
- ✓ For unsolicited proposals, use the indirect approach and unfold recommendations by focusing on logical argument.

Organizing Visuals

- ▣ Decide which points require visual support
- ▣ Maintain a balance between illustrations and words
- ▣ Consider out production schedule

WHEN TO USE VISUALS

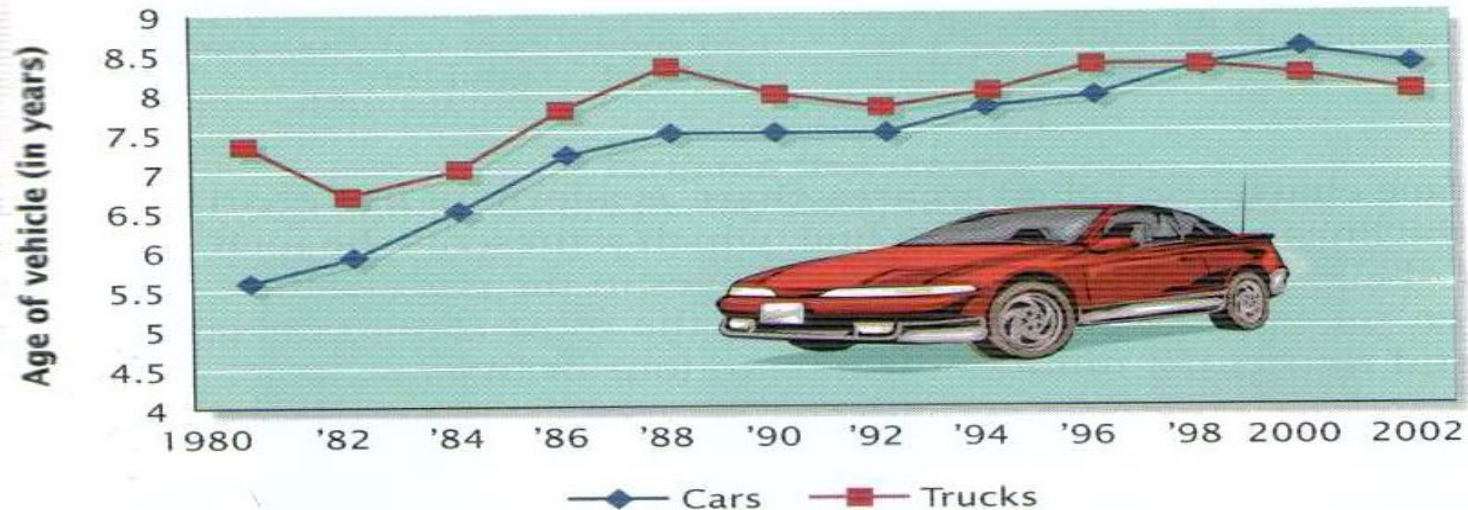
Purpose	Application
To clarify	Support text descriptions of “graphic” topics: quantitative or numerical information, explanations of trends, descriptions.
To simplify	Break complicated descriptions into components that can be depicted with conceptual models, flowcharts, organization charts, or diagrams.
To emphasize	Call attention to particularly important points by illustrating them with line, bar, and pie charts.
To summarize	Review major points in the narrative by providing a chart or table that sums up the data.
To reinforce	Present information in visual and written form to increase reader’s retention.
To attract	Make material seem more interesting by decorating the cover or title page and by breaking up the text with visual aids.
To impress	Build credibility by putting ideas into visual form to convey the impression of authenticity and precision.
To unify	Depict the relationship among points—for example, with a flowchart.

Selecting the Right Visual for the Job

Some types of visuals depict certain kinds of data better than others:

- To present detailed, exact values, use tables.
- To illustrate trends over time, use a line chart or a bar chart.
- To show frequency or distribution, use a pie chart, segmented bar chart, or surface chart.
- To compare one item with another, use a bar chart.
- To compare one part with the whole, use a pie chart.
- To show correlations, use a line chart or a bar chart.
- To show geographic relationships, use a map.
- To illustrate a process or a procedure, use a flowchart or a diagram.

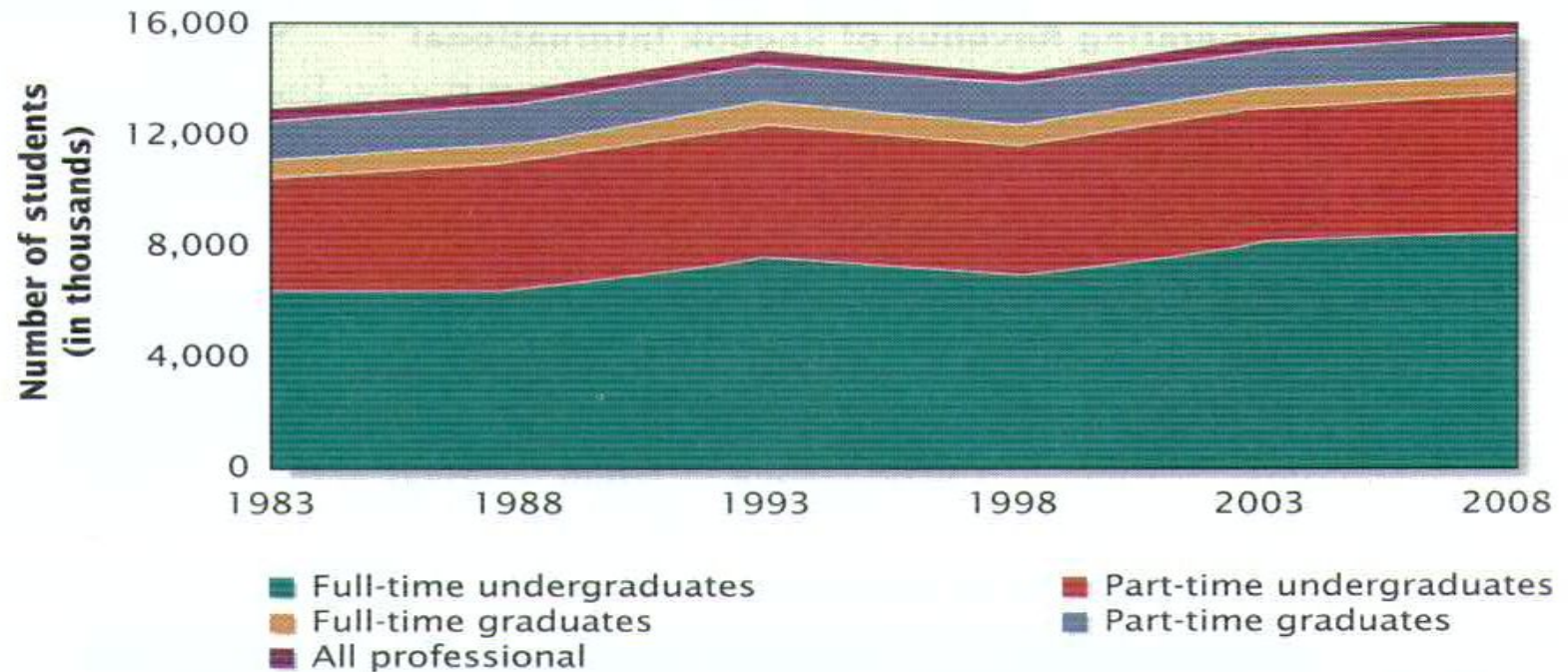
Average Age of Passenger Cars and Trucks in Use



Use line charts

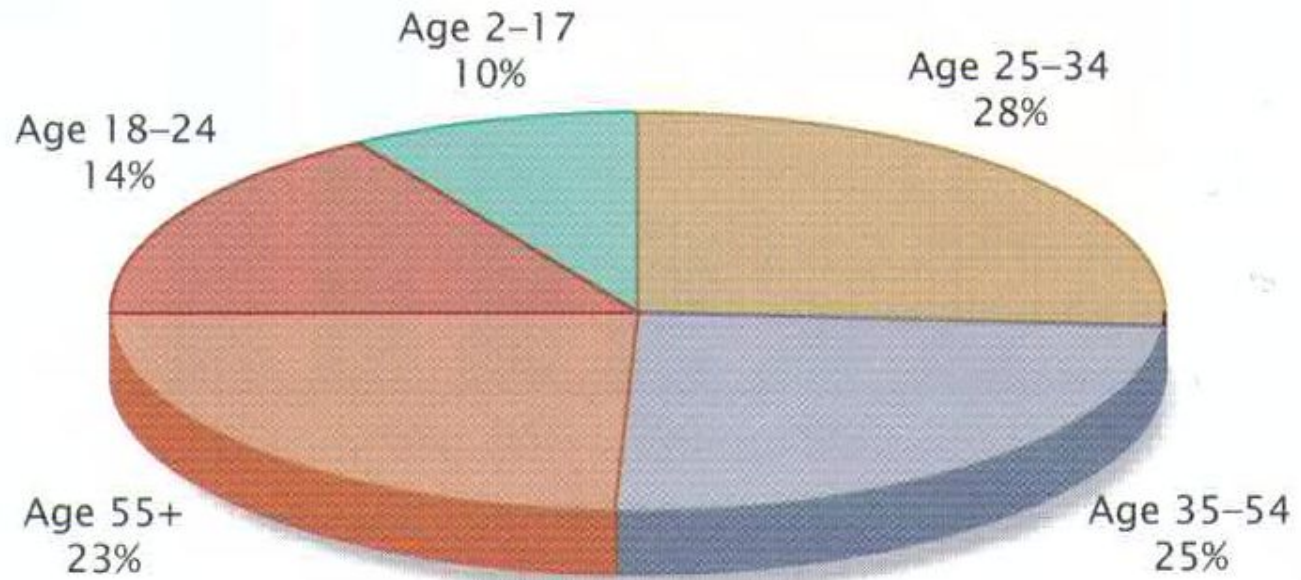
- To indicate changes over time
- To plot the relationship of two variables

How College Enrollment Is Changing

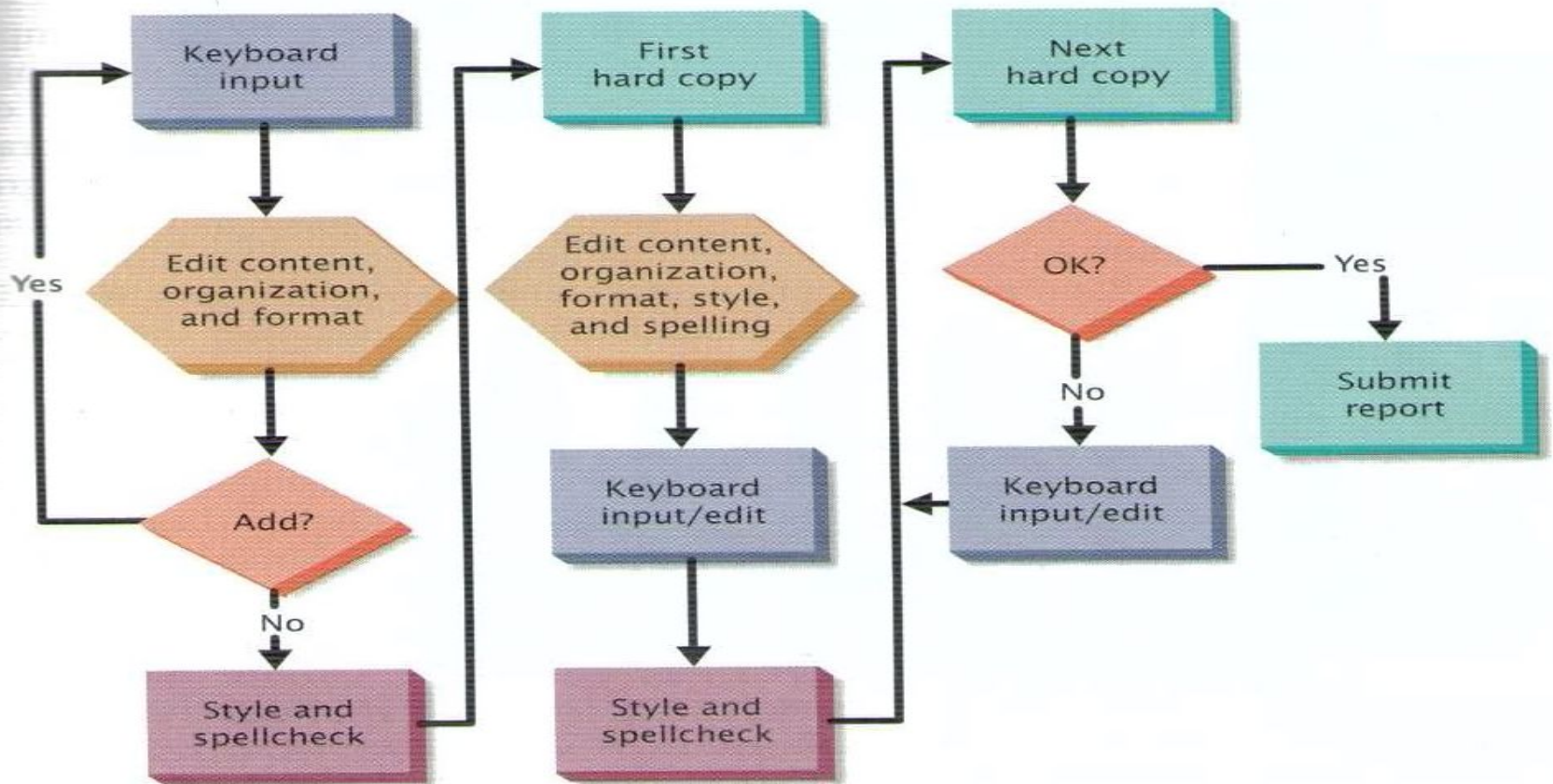


A surface chart (area chart) is a kind of line chart showing a cumulative effect.

Time Spent Online by Age Group



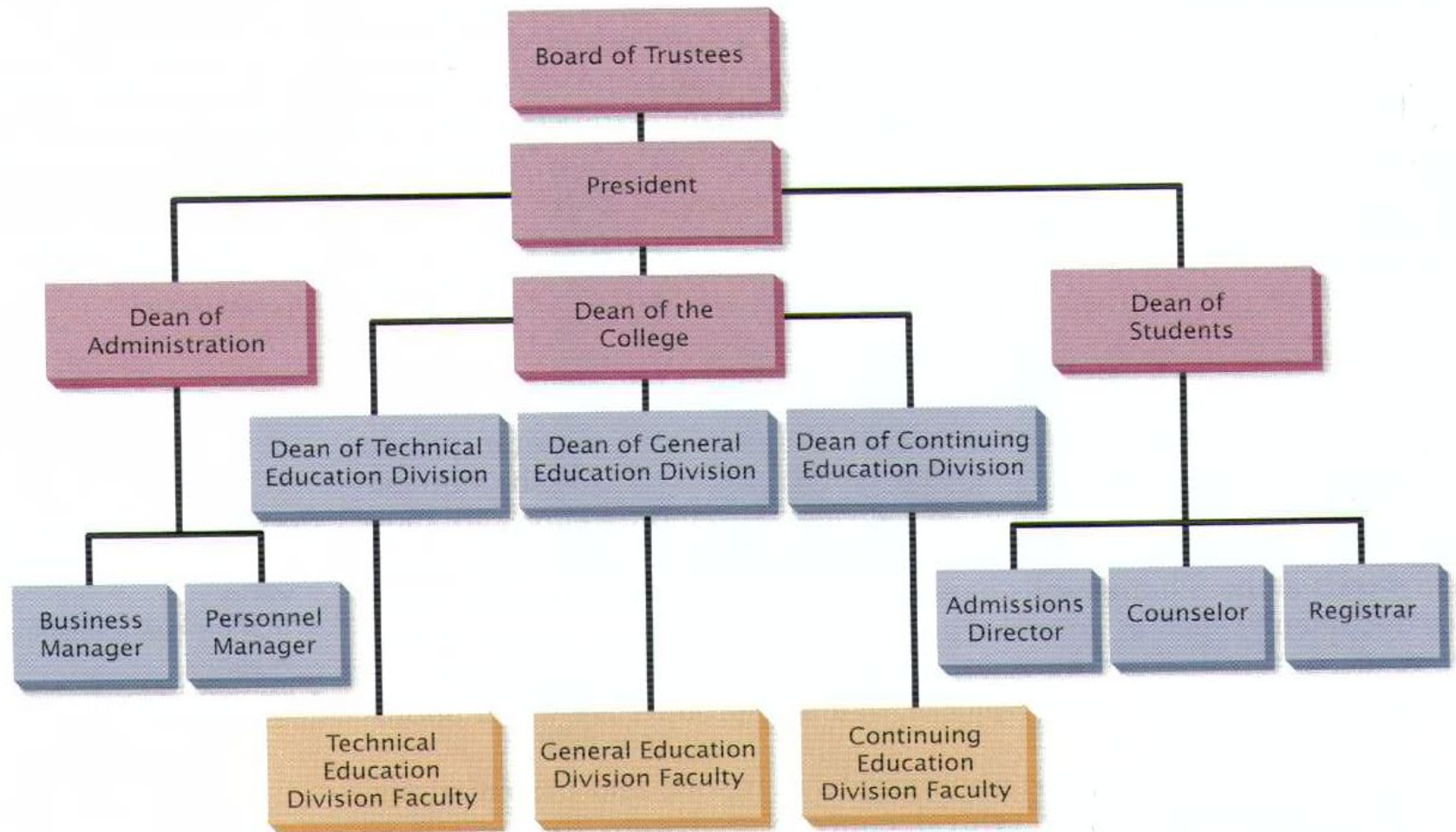
Use pie charts to show the relative sizes of the parts of a whole.



Use flowcharts

- To show a series of steps from beginning to end
- To show sequential relationships

Administration and Faculty of Atlantic College



Use organization charts to depict the interrelationships among the parts of an organization.

Checking Visuals

- ▣ Is the visual necessary?
- ▣ Is the visual accurate?
- ▣ Is the visual honest?
- ▣ Is the visual properly documented?

✓ CHECKLIST: Organizing Visual Aids

Prepare Carefully

- ✓ Use visuals to enhance, not replace, your words.
- ✓ Select the points that need to be supported by visuals.
- ✓ Balance your words with your visuals.
- ✓ Keep your production schedule in mind.

Select the Proper Types of Visuals

- ✓ Use tables to display detailed, specific information.
- ✓ Use line charts to illustrate trends over time or the relationship of two variables.
- ✓ Use surface charts to show cumulative effects.
- ✓ Use bar charts to compare the size of several items at once, show changes in one item over time, indicate the composition of several items over time, and show the relative size of components of a whole.
- ✓ Use pie charts to show how parts of a whole are distributed.
- ✓ Use flowcharts and organization charts to show physical or conceptual relationships.
- ✓ Use drawings, diagrams, and photographs to illustrate how something looks or operates.

Create Effective Visuals

- ✓ Gain speed, accuracy, ease of use, and reusability from computer graphics.

- ✓ Think about the style of the visuals you use and what that says about your image.
- ✓ Make design elements consistent.
- ✓ Use contrasting colors to emphasize differences and similar colors to emphasize similarities.
- ✓ Emphasize only the most important points with visuals.
- ✓ Make visuals simple and easy to understand, and avoid excessive clip art and all unnecessary details.
- ✓ Make sure that design elements meet audience expectations.

Tie Visuals to Your Text

- ✓ Clearly reference illustrations in text.
- ✓ Assign each illustration a number or letter.
- ✓ Place visuals close to the points they illustrate.
- ✓ Make headings, labels, titles, and legends clear, whether descriptive or informative.

Check Over Your Visuals

- ✓ Proof visuals for typos, color treatment, and alignment.
- ✓ Make sure each visual is necessary.
- ✓ Ensure the accuracy of each visual.
- ✓ Properly document each visual.
- ✓ Create honest, ethical visuals.

Composing Business Reports and Proposals

- ▣ Choosing the proper Degree of Formality

Certain audiences and situations require a more formal style.

Composing Business Reports and Proposals

▣ Establishing a Consistent Time Perspective

Of those interviewed, 25 percent report that they are dissatisfied with their present brand. The wealthiest participants complained most frequently. In all income categories are interested in trying a new brand. Only 5 percent of the interviewees said they have no interest in alternative products.

Be consistent in the verb tense you use.

Follow a proper chronological sequence in your report.

Composing Business Reports and Proposals

Helping Reader Find Their Way;

- ▣ Headings
- ▣ Transitions
- ▣ Previews and reviews

Developing the Text

You will create more successful reports if your content is;

- ▣ Accurate
- ▣ Complete
- ▣ Balanced
- ▣ Well structured
- ▣ Well documented

In additional;

- ▣ Demonstrate you knowledge
- ▣ Provide concrete
- ▣ Research the competition
- ▣ Prove that your proposal is workable
- ▣ Adopt a “you” attitude
- ▣ Package your proposal attractively

Drafting the opening

- Tie the report or proposal to a problem or an assignment.
- Introduce the report's subject (purpose) and indicate why the subject is important.
- Preview the main ideas and the order in which they'll be covered.
- Establish the tone of the document and your relationship with the audience.

Table 11-4**TOPICS COMMONLY ADDRESSED IN REPORTS AND PROPOSALS****Report Contents****Introduction**

- **Authorization.** Review who authorized the report (when, how), who wrote it, when it was submitted.
- **Problem/purpose.** Explain the reason for the report's existence and what the report will achieve.
- **Scope.** Describe what will and won't be covered in the report—indicating size and complexity.
- **Background.** Review historical conditions or factors that led up to the report.
- **Sources and methods.** Discuss the primary and secondary sources consulted and the methods used.
- **Definitions.** List terms and their definitions—may also be defined in the body, explanatory notes, or glossary.
- **Limitations.** Discuss factors beyond your control that affect report quality—not an excuse for a poor study or bad report.
- **Report organization.** Tell what topics are covered in what order.

Body

- **Explanations.** Give complete details of the problem, project, or idea.
- **Facts, statistical evidence, and trends.** Lay out the results of studies or investigations.
- **Analysis of action.** Discuss potential courses of action.

Proposal Contents**Introduction**

- **Background or statement of the problem.** Briefly review the reader's situation, establish a need for action, and explain how things could be better. In unsolicited proposals, convince readers that a problem or opportunity exists.
- **Solution.** Briefly describe the change you propose, highlighting your key selling points and their benefits to show how your proposal will solve the reader's problem.
- **Scope.** State the boundaries of your proposal—what you will and will not do.
- **Report organization.** Orient the reader to the remainder of the proposal and call attention to the major divisions of thought.

Body

- **Facts and evidence to support your conclusions.** Give full details of the proposed solution and the anticipated results.
- **Proposed approach.** Describe your concept, product, or service. Stress reader benefits and emphasize any advantages you have over your competitors.

- **Pros and cons.** Explain advantages, disadvantages, costs, and benefits of a particular course of action.
- **Procedures.** Outline steps for a process.
- **Methods and approaches.** Discuss how you've studied a problem (or gathered evidence) and arrived at your solution.
- **Criteria.** Describe the benchmarks for evaluating options and alternatives.
- **Conclusions and recommendations.** Discuss what you think the evidence reveals and what you propose to do about it.
- **Support.** Give the reasons behind your conclusions or recommendations.
- **Work plan.** Describe how you'll accomplish what must be done (unless you're providing a standard, off-the-shelf item). Explain the steps you'll take, their timing, the methods or resources you'll use, and the person(s) responsible. State when work will begin, how it will be divided into stages, when you'll finish, and whether follow-up will be needed.
- **Statement of qualifications.** Describe your organization's experience, personnel, and facilities—relating it all to readers' needs. Include a list of client references.
- **Costs.** Prove that your costs are realistic—break them down so that readers can see the cost of labor, materials, transportation, travel, training, and other categories.

Close

- **For direct order.** Summarize key points (except in short memos), listing them in the order they appear in the body. Briefly restate your conclusions or recommendations, if appropriate.
- **For indirect order.** You may present your conclusions or recommendations for the first time—just don't present any new facts.
- **For motivating action.** Spell out exactly what should happen next and provide a schedule with specific task assignments.

Close

- **Review of argument.** Briefly summarize the key points.
- **Review of reader benefits.** Briefly summarize how your proposal will help the reader.
- **Review of the merits of your approach.** Briefly summarize why your approach will be more effective than that of competitors.
- **Restatement of qualifications.** Briefly reemphasize why you and your firm should do the work.

Drafting the Body

- ▣ The body contains the substance of your report or proposal
- ▣ Restrict the body to those details necessary to prove your conclusions and recommendations

Drafting the close

- Emphasize the main points of the message.
- Summarize reader benefits (if some sort of change or other course of action is suggested).
- Refer back to all the pieces and remind readers how those pieces fit together.
- Bring all the action items together in one place and give details about who should do what, when, where, and how.

In the final section of a proposal, you should accomplish five goals:

- Summarize the key points of the proposal.
- Emphasize the benefits that the readers will realize from your solution.
- Summarize the merits of your approach.
- Re-emphasize why you and your firm are the ones to do the work.
- Ask for a decision from the client.

CHECKLIST: Composing Business Reports and Proposals

Prepare a Final Outline

- ✓ Use the outline to revise the order and content of information as needed.
- ✓ Use informative headings for a hard-hitting, direct tone.
- ✓ Use descriptive headings for an objective, indirect tone.
- ✓ Use parallel construction.

Develop the Text

- ✓ Reports and proposals have an opening, body, and close.
- ✓ Content and length of each section varies.
- ✓ Be sure report content is accurate, complete, balanced, well-structured, and well-documented.
- ✓ In proposals, be sure to demonstrate your knowledge, provide concrete examples, research the competition, prove that your proposal is workable, adopt a "you" attitude, and package your proposal attractively.

Draft the Opening

- ✓ Tie the message to a problem or assignment.
- ✓ Introduce your subject and explain why it's important.
- ✓ Preview the main ideas and the order in which they are discussed.
- ✓ Establish the tone of the message and your relationship with the audience.
- ✓ In proposals, be sure to also summarize the solution to the problem, and mention the RFP in unsolicited proposals or the factors that led you to submit an unsolicited proposal.

Drafting the Body

- ✓ Present, analyze, and interpret the information you gathered during your investigation.
- ✓ Include the "proof" that supports your conclusions and recommendations.
- ✓ Provide only as much detail as you need to support your conclusions and recommendations.
- ✓ In direct analytical reports, provide the evidence to support your conclusions and recommendations.
- ✓ In indirect analytical reports, explain and discuss your logic, reserving your conclusions and recommendations until the very end.

Draft the Close

- ✓ Leave a strong and lasting impression.
- ✓ Emphasize the main points.
- ✓ Summarize the reader benefits of the recommended action.
- ✓ Remind readers of how all the pieces of your report fit together.
- ✓ Review all action items and delineate who should do what, when, where, and how.
- ✓ In direct reports, summarize key points and briefly restate your conclusions and recommendations.
- ✓ In indirect reports, you may state your conclusions and recommendations for the first time.
- ✓ You may cover your conclusions and recommendations in separate sections or under one heading.
- ✓ In a proposal, in addition to summarizing key points and emphasizing reader benefits, review the merits of your approach, restate why your firm or group should do the work, and ask for a decision from the client.

Choose the Proper Degree of Formality

- ✓ Use an informal style (I and you) for letter and memo reports (unless your company prefers impersonal third person).
- ✓ Use an impersonal style for more formal, short reports in manuscript format.

Maintain a Consistent Time Frame

- ✓ Write in either the present or the past tense, using other tenses only to indicate prior or future events.
- ✓ Don't flip from tense to tense.
- ✓ Observe the chronological sequence of events.

Help Readers Find Their Way

- ✓ Provide headings to improve readability, clarify framework, and indicate shifts in discussion.
- ✓ Use transitions to tie ideas together and help readers move from one topic to the next.
- ✓ Provide previews to prepare readers for new information.
- ✓ Provide reviews to summarize information and help readers see the big picture.