

How to

...write a business report



If you are asked to write a report, it should be laid out in a particular way. As with any type of communication, you need to think about:

- **its purpose.** Why are you writing the report? What information do you need to get across? Is the information sensitive? Do you need to make any recommendations?
- **your audience.** Who is going to receive the report? What is their relationship to you? What do they know already? How will the information affect them?

Tips for writing business reports

Prepare

- Make sure that you are clear about the **purpose** of the report.
- Collect together all relevant details or information.
- Write notes on what you need to say first.

Plan

- Think about the best way to present the information for your **audience**.
- Structure the information clearly under headings.

Write

- Use clear paragraphs and short, clear sentences.
- Use the guidelines given in this worksheet for organising your work.

Check

- Proof-read your work.
- Check spellings in a dictionary, with the spell-checker or with another person.

People are more likely to take you seriously if your report is accurate and well written.

Formal reports

At work or as part of your course, you may be asked to write a short **formal** report. Organisations use this type of report to gain insight into a problem, or to find out more about an issue. A formal report might be used to report on reasons for customer complaints, or to investigate the usefulness of a new technique that has been tried or equipment that's being used.

It should contain:

- **a title page or heading**, giving the title, name of the company, recipient(s) and date
- **terms of reference and background information**, saying what you have been asked to do and why, by whom and the submission date
- **information about your procedure**, showing how and where you found your information and under what conditions (to show its reliability)
- **findings organised in sections or schematically**, so that the information is arranged either under headings or as sentences/short paragraphs with numbered points
- **your conclusions**, which give the answers to your original questions, having looked at the findings
- **recommendations**, if required
- **the signature of the author, and the date**, usually at the end
- **appendices**, if appropriate. Any raw or original data used for reference must be listed at the end of the document.



REPORT ON USE OF STATIONERY IN THE FINANCE DEPARTMENT

To: Jean Harstow, Head of Purchasing
From: Mary Barton,
3 June 2006

As part of the Business Review, I was asked by the Head of Purchasing to monitor and report on the use and wastage of paper and envelopes in the Finance Department over the period March–May 2006. I have been asked to make recommendations which may be used to inform purchasing policy.

To do this, I have:

- kept a record of stationery used (log sheets in Appendix 1)
- monitored the use of the photocopier and waste bin next to the copier
- asked staff what types of stationery they are using for specific jobs

FINDINGS

1. Stationery log

In the period March to May the following stationery was used:

120 reams 100 gram paper	33 reams copy paper A3
1500 envelopes (window)	3 memo pads
310 reams copy paper A4	23 lined note pads

2. Use of the photocopier

It was clear from the amount of paper in the waste bin each day and the amount of paper used that staff are not able to use the photocopier efficiently. Staff said that they were not sure about:

- which processes to select for more complex tasks, e.g. how to make double-sided copies
- how to clear paper jams
- how to replace ink cartridges
- Staff are often undertaking copying jobs by trial and error which is leading to substantial wastage.
- The copier is sometimes unreliable and produces poor copies. This may also be due to user error.

3. Staff responses

Staff were asked the questions which are in Appendix 2. It appears that staff are using 100 gram paper for all jobs including making notes. Only one person was using the lined note pads, yet there are only 5 left in the cupboard. It is not clear where these have gone. Most staff had memo pads but tended to use email for internal messages.

CONCLUSIONS

Much of the wastage of stationery is due to:

- no choice of paper weights appropriate to different jobs
- lack of training on the photocopier
- staff not using the correct stationery for the job in hand.

RECOMMENDATIONS

It would be useful to consider the following points for the Business Review:

- ordering a range of grades of paper from 80–100 gram to be used for specific jobs
- arranging staff training on the use of the photocopier
- asking staff to use lined note paper for informal notes.

Mary Barton

Title; names of recipient and sender; date

What you have been asked to do and why, and by whom

How and where you found your material and under what conditions (to show its reliability)

The information you have found, either organised under headings or as sentences/short paragraphs with numbered points

Conclusions: sum up your answer to the initial question

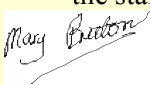
Recommendations: only give these if requested

Signature

Informal reports

You may be asked to write a short **informal** report for your immediate manager. The further you progress, the more likely you are to do work of this sort. This type of report normally contains:

- **an introduction**, with a heading, the date and information on the background and where you found your material
- **your findings**, styled according to purpose and audience, either under headings or as numbered points in sentences
- **your conclusions and recommended actions**, styled according to purpose and audience
- **your signature**, usually at the end.

<p>To: Roy Turner, Head of Finance September From : Mary Barton</p> <p>STATIONERY SURVEY I have now completed the stationery survey task as you requested.</p> <p>FINDINGS 1. Log of stationery used I've attached a list of the stationery used during the period March–May. At the moment 100 gram paper is being used for all tasks including copies and drafts. Other departments are using a combination of 70 and 80 gram paper for these tasks. 2. Use of photocopier A great deal of wastage was obvious from the amount of paper in the waste bin each day. Time was also wasted by staff who were not sure how to use the machine. 3. Staff views I spoke to each of the staff and they did not seem sure about which stationery should be used for specific jobs. I looked in the staff handbook and found some instructions which are now out of date.</p> <p>CONCLUSIONS Most of the wastage could be reduced by ordering different paper weights and making sure staff know how to use the stationery and machines effectively.</p> <p>RECOMMENDATIONS It would help to make savings if:</p> <ul style="list-style-type: none">• a range of paper was available and staff knew which one to choose for each job• staff were given training on how to use the photocopier• the staff handbook instructions were updated <p> 4 June 200.</p>	<p>Headings and introduction</p> <p>Findings</p> <p>Conclusions</p> <p>Recommendations: only give these if requested</p> <p>Signature and date</p>
--	--

Try this!

- 1 Find a report that has been written or used in your own place of work.
- 2 Ask your manager when reports might be used.
- 3 If you are asked to write a report, check whether it should be formal or informal, and use one of the layouts above.