

Tips for Writing Reports

Excerpted from the HBR Guide to Better Business Writing by Bryan A. Garner. (Edited slightly for greater relevance, clarity and simplicity.)

Reports are often used to get people up-to-speed on an issue quickly or to induce action. Therefore, it's important to be clear and concise in each element—your title, summary, body, and conclusion—regarding what you want readers to understand or do.

Pick a short, clear title

Whether you're writing the subject line of an email or the title of a report, choose concise and meaningful language that says exactly what the document is about.

Not this –	But this –
Subject: Siegelson	Subject: Approval of Siegelson Acquisition
Subject: Settlement	Subject: Why We Should Reject Frost's Settlement Offer
Subject: Print Run	Subject: Ginsburg Autobiography Print Run

In the table above, the titles on the left *hint* at the topics covered and avoid telling readers what they're supposed to do with the information. Those on the right are more pointed (without being wordy). Note that the first and third titles promise status updates; the second asks readers to follow a recommendation.

Summarize key specifics up front

Figure out how many main issues you're addressing—preferably no more than three—and then for each:

1. State the issue in a way that anyone can understand
2. Explain your solution
3. Offer reasons for your solution

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Here's an example:

Example Summary Statement
<p>Issue: Arnold Paper Supply has consistently failed to meet our deadlines for delivery of multicolor, printed cardstock.</p> <p>Proposed Solution: Switch to National Paper and Plastics Company, which has a higher fixed fee.</p> <p>Reason: Though National Paper and Plastics has a higher rate per delivery, its turnaround is faster. This will increase efficiency in the warehouse, allow us to fill more orders, and help us to establish goodwill with retailers who have been upset with us for not meeting their deadlines.</p>

By sharing everything important at the beginning of the document, you'll end up repeating yourself—but in a way that's reinforcing, not redundant. Readers will get a brief orientation with your short version up front; the fully elaborated version in the body will unpack each point, providing details and data for support.

It's not unusual for a writer to go back and forth between the summary and the body when writing their first draft: Start by stating the problem and then in your summary offer your best shot at the answer. As you work on the body of the report, go back and refine the problem and the answer.

Write your summary for three types of readers:

1. A **primary audience of one or more executives** interested only in a quick status update, your findings and conclusions about a problem, or your recommendations.
2. A secondary audience of **reviewers** who may be called in (with or without your knowledge) to assess the soundness of your document, judging its merits according to their own fact-checking and critical analyses.
3. **Future readers** (including those in the first category two years from now) who will be required to quarry information from your document sometime after you've written it. (After all, memos and reports are rarely acted on quickly: They may be laid aside for weeks or months or even years before anyone has the resources or a mandate to act.)

All three types of readers have legitimate claims to your attention. If you want your recommendations to be adopted, it's important to try to win over all of them.

Even if someone else has assigned you the question you're exploring, you must define it in your summary.

You, the writer, are in the best position to limit its scope: The person who did the assigning may not know enough about the problem to raise the right question—or to understand, for example, that it contains three sub-questions.

In fact, you won't know these things until you do your research, which may involve digging up data that reveal where the problem lurks, reading about how other organizations have tried to

solve it, talking with people who have discovered some helpful workarounds, and so on. You should do enough research to understand the problem.

Then state the problem so clearly that anyone could understand why it's worth solving.

If you're making a recommendation, state:

1. What needs to be done
2. Who should do it
3. When and where it should be done
4. Why it should be done
5. How it should be done

When Writing a Report...

- Make sure you understand why you're writing and what you're reporting on.
- Do your best, considering your background knowledge and initial research, to write a summary that concisely states the problem, your solution, and why your solution will work or why it's preferable to alternatives.
- Discern sources of relevant information.
- From those sources, gather all the data and explanations that you can.
- Synthesize relevant observations and inferences and throw out the rest.
- Put your findings into report form.
- Revise your summary to match your body text.

Sample Marketing Report

A brief marketing report might look like this:

Marketing Strategy for Skinny Mini Line of Chocolates

Summary

Issue: Within the last fiscal year, Pantheon Chocolate's sales have dropped from \$13,320,000 to \$10,730,000, but its market share remains unchanged at 37%.

Proposed Solution: Increase promotion of the Skinny Mini line of chocolates. These chocolates contain less sugar and fat than the regular line.

Reason: Health-conscious consumers want low-calorie options but don't want to sacrifice full flavor. The Skinny Mini chocolates have fewer calories than Pantheon's regular chocolates but the same flavor.

Consumers are buying more "healthy alternative" chocolates

Because consumers increasingly regard sugar and fat as unhealthy, they are not buying as much high-end gourmet chocolate as they were a year ago. This has led to a decline in sales for all high-end chocolate makers, including Pantheon. But for candies marketed as "healthy alternatives" with less sugar and fat and fewer calories, sales have increased 42% in the same period. Marketing studies show that consumers of "healthy alternative" candies are most attracted to low-calorie chocolates that are packaged in specific-calorie portions rather than by weight.

These consumers also complain that low-calorie candies lack the rich flavor that they are used to, and they are willing to pay more for quality. Pantheon already produces a line of low-calorie gourmet chocolates, Skinny Minis, that have fewer calories than Pantheon's regular candies but the same flavor. They're currently sold by the pound or in gift boxes in high-end chocolate boutiques and as elegantly wrapped bars in coffee shops.

Recommendations

- To reach more health-conscious consumers, Pantheon should package Skinny Mini chocolates in a variety of portion-controlled sizes and make them available in health-food stores and supermarkets as well as the chocolate and coffee shops.
- The marketing campaign should stress the controlled portion and limited calories of each Skinny Mini bar or gift box, and the packaging should boldly display the low calorie count.

Recap

- Choose a concise title or subject line that tells readers what topics the memo or report covers and what they should do about it (or why they should care).
 - Begin your document by addressing your main points and outlining the issue, your solution, and the reason for it.
 - Work from this summary when elaborating the body of your first draft.
 - Modify the summary as you go to ensure that it accurately reflects what's in the body.
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