Business Report Writing Skills

Tips and advice to make any report you create look the business!

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NAME

LITMOS HEROES

Saving the world *from* boring learning

BUSINESS REPORT WRITING SKILLS

How to use this workbook

Use the knowledge and skills covered in this workbook to make any report you create look the business.

It is designed to support the topics explored in the Business report Writing Skills e-learning course.

You can work through the entire course, or, if you are on a tight deadline, you have the option to go straight to particular skills you'd like to work on.

As you work through the topics covered in this course, you'll discover how simple changes in the way you prepare, organise and write your reports, can make your make your reports stand out, and allow you to develop a strong reputation for intellect and professionalism.

WHO SHOULD READ THIS?

- Anyone whose job requires them to prepare business reports.

KEY INSIGHTS

- **Prepare** – Before you write any content, you must invest some time to make sure you've got the essential information covered.
- **Organise** – Gather and organise supporting information to support the purpose and scope of the business report.
- **Graphics** – Graphics form part of any modern, standard business report. Use tables, diagrams and infographics to make your report stand out.
- **Write** – To maximise a report's potential, follow this simple method: structure, style and a KISS!
- **Edit and Correct** – As with any formal piece of writing, business reports will benefit from a thorough proof and edit.
- **Read it out** – If you are going to present your report in a meeting, read it out loud beforehand. This will help your timing and influence the speed and tone of your presentation delivery.

PREPARE

Imagine for a minute that you wanted to climb mount Everest. Would you just dive straight in, set off and have a go? If you did, you might quickly regret it.

A much better idea would be to prepare first. Although writing a report isn't quite as challenging as climbing the world's largest mountain – the principle of preparation first still applies.

Before you write any content, you must invest some time to make sure you've got the essential information covered.

To help you do this, you can use the rule of seven questions. Seven simple questions that help you structure your report, and make sure you're prepared.

Let's quickly run through them now.

NUMBER 1 - WHO IS IT FOR?

Consider your target audience. Is it for the board of senior directors, operational managers, your peers or junior colleagues? You will need to adjust the style and language of your report to suit the right audience. Establishing the target audience will also help you send your report to the right people.

NUMBER 2 - WHAT IS IT ABOUT?

Identify the core subject of your report and give it a concise and relevant title.

NUMBER 3 - WHY IS IT NEEDED?

Establish the purpose of your report and how it will benefit the business. Remember: time is money! If you can't justify the need for your report, don't write it!

NUMBER 4 - WHEN DO YOU NEED IT BY?

Establish the deadlines and put aside enough time for gathering data, writing and preparing to present the report.

NUMBER 5 - WHERE WILL IT BE PUBLISHED, OR PRESENTED?

Establishing correct distribution channels aids smooth planning and execution.

NUMBER 6 - HAVE YOU GOT ENOUGH INFORMATION?

Make a list of the resources and materials needed to make your report credible and convey a strong message to its readers.

NUMBER 7 - HOW WILL YOU GATHER DATA SUPPORT YOUR REPORT?

Make a list of the resources and materials needed to make your report credible and convey a strong message to its readers.

ORGANISE

Now that you have a clear understanding of the purpose and the scope of the business report, you are ready to gather and organise the supporting information.

How you organise your report will largely depend on the report objective, but some basic principles do apply.

DIVIDE CONTENT INTO SECTIONS

A business report can quickly turn into a flood of figures and information, leaving the reader overwhelmed. Avoid this by organising the data into separate sections.

Give your report sections appropriate headers, allowing the reader to scan through quickly and find pertinent information.

GIVE YOUR REPORT HEADERS

WE LIVE IN A VISUAL WORLD

93%
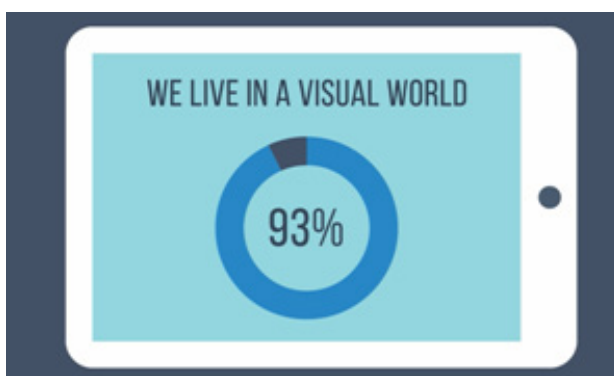
We live in a visual world. In fact, 93% of all human communication is visual. So, think of graphic solutions, such as tables, diagrams, infographics and illustrations, that can help you present the data in a more visually-friendly way.

THE IMPORTANCE OF GRAPHICS

Before we move onto your next super power, a word on graphics.

Graphics form part of any modern standard business report.

But to use them successfully, graphics must be carefully selected, and convey information clearly to the reader.

Here's our guide on how to make your reports look the business.

TABLES

Consider your target audience. Is it for the board of senior directors, operational managers, your peers or junior colleagues? You will need to adjust the style and language of your report to suit the right audience. Establishing the target audience will also help you send your report to the right people.

TABLE 1

| PLANET	DIAMETER (KM)	GRAVITY (EARTH RATIO)	YEAR (EARTH DAYS)	TEMPERATURE (K)
MERCURY	5,100	0.40	88	700
VENUS	12,600	0.90	225	700
EARTH	12,800	1.00	365	350
MARS	6,900	0.40	687	320
JUPITER	143,600	2.70	4,333	150
SATURN	120,600	1.20	10,759	138
URANUS	53,400	1.00	30,686	90
PLUTO	12,700	???	90,885	80

Use tables to present categories and quantities.

Organise the data in the columns logically, so that the reader can easily find what they are looking for.

DIAGRAMS

Here are seven tips you can use to make your diagrams really stand out.

1. Use line graphs to demonstrate trends and forecasts.

2. Use bar charts to compare data directly, particularly where small differences are apparent, or to show time series data. Remember to display data according to the size of value.

3. Avoid stacked bar graphs as they are more difficult to understand.

4. If you must present two or more different series of data, just group them together into clusters, side by side.

5. Use pie charts to show the proportional representation of elements where all parts total 100%.

6. Avoid using 3-D features as that makes it more difficult to compare the relative size of the slices.

7. And finally, make sure you use 0 as the baseline for your charts and stick to standardised scale ranges throughout the report.
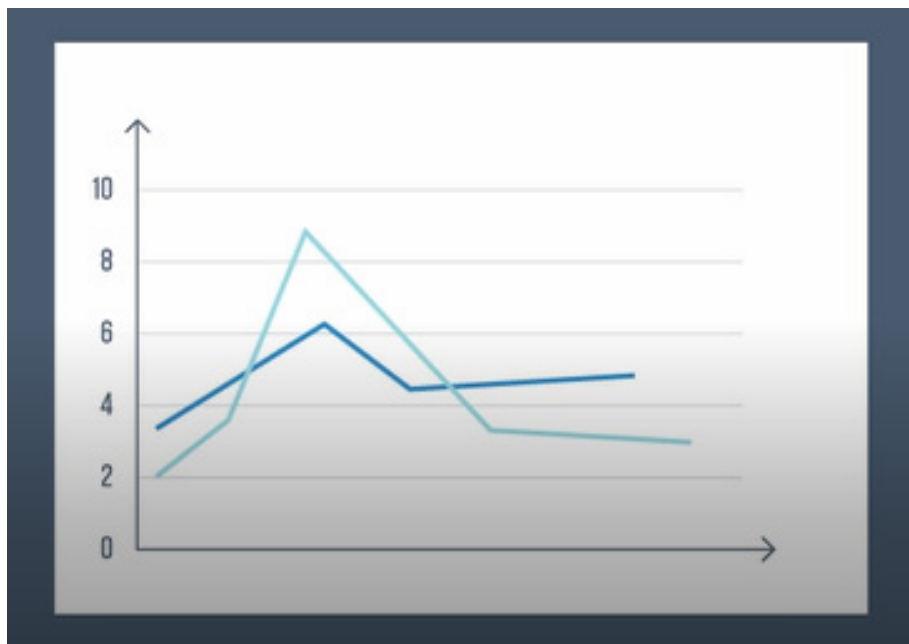
ILLUSTRATIONS AND INFOGRAPHICS

KEY SALES TEAM PERFORMANCE REVIEW POINTS FOR DECEMBER 2016, AND RECOMMENDATIONS FOR JANUARY 2017

FAILED
- UNDER-DELIVERED ON 10 LAST MINUTE ORDERS
- FORGOT TO PASS RELEVANT INFORMATION ON TO DELIVERY DRIVERS ON 2 OCCASIONS, CAUSING DELAYS AND REFUNDS.

ROOM FOR IMPROVEMENT
- ANWERED ONLY 50% TELEPHONE CALLS WITHIN LESS THAN 3 RINGS.
- COMMUNICATION SKILLS WHEN DEALING WITH DIFFICULT SITUATIONS

WELL DONE!
- ACQUIRED 3 NEW CORPORATE CLIENTS
- ALL TEAM MEMBERS ACHIEVED MINIMUM 95% SALES TARGETS

Use infographics and images to illustrate ideas, processes and procedures in a powerful way and to break down text-heavy pages.

Focus only on the key points and use those to tell the story.

For example, imagine you need to report on how different telesales centres are performing across the country – you could use a map with the locations clearly labelled.

And you can add a pie chart to depict how well each centre is doing in relation to the group.

WRITE

STRUCTURE

STYLE

KISS!

Now, it's time to write your report. To maximise its potential, follow this simple method:

A well-structured report is tailored to the right type of audience, concise and easy to follow. The correct style will give your report credibility and show your respect for the reader. And a kiss? Well, who wouldn't want one! No, seriously – Keep it Short and Simple!

Time is money, and being presented with a long and convoluted report is annoying and a big time waster. So, let's look at each section in more detail, starting with structure.

STRUCTURE

A proper, formal report should consist of 8 clearly defined sections:

1. COVER PAGE
2. EXECUTIVE SUMMARY
3. TABLE OF CONTENTS
4. INTRODUCTION
5. BODY
6. CONCLUSION
7. REFERENCE LIST
8. APPENDICES

Let's take a closer look at each section, so you know what to include in your own reports.

1. Cover Page

Here you should include the title of your report, your name, date and the company logo.

You may also want to say who it is for.

TITLE
YOUR NAME
DATE
LOGO
PREPARED FOR
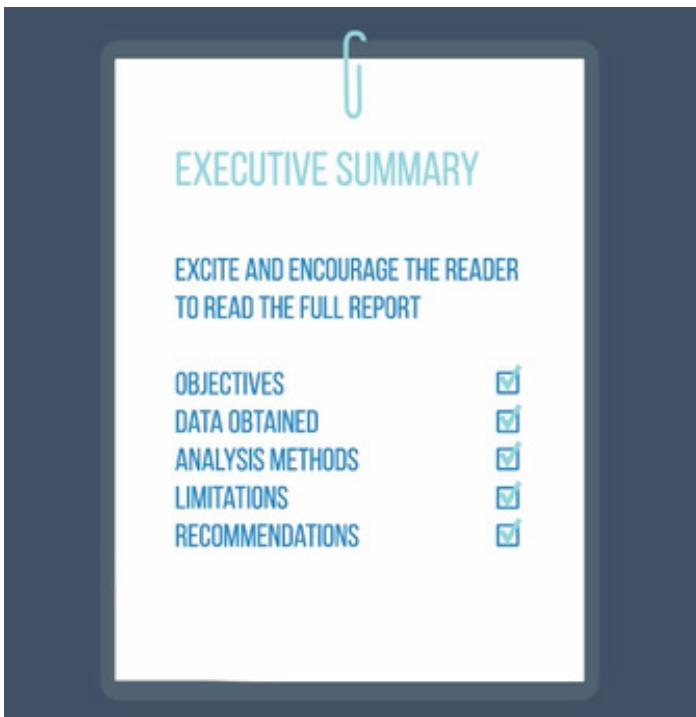
2. Executive Summary

Next you need an executive summary, or management summary. Its goal is to excite the reader and encourage them to read the full report.

Briefly summarise the objectives of your report, the data obtained, analysis methods, limitations and your recommendations (in a few paragraphs on one page).

3. Table of Contents

A clear table of contents is a must, with clear and concise headings for all the report sections.
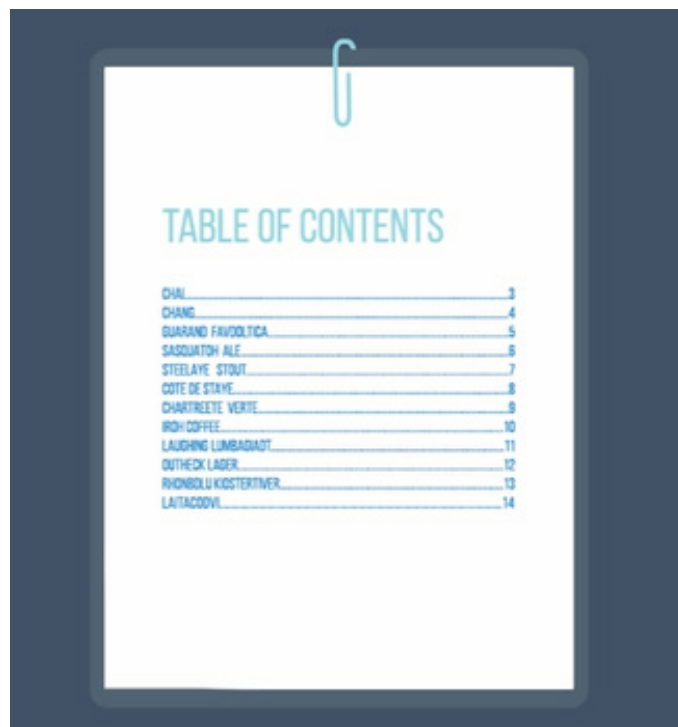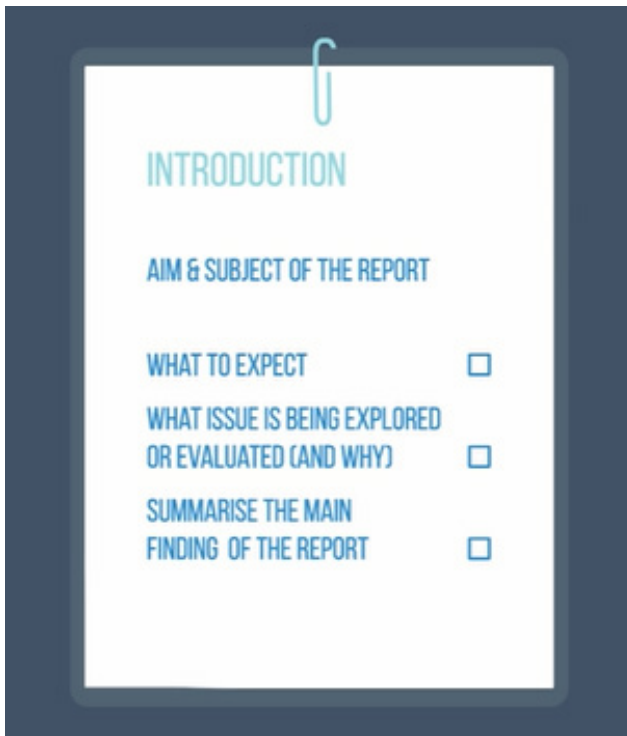
4. Introduction

Next up, you need an introduction to the report. Use this section to introduce the aim and subject of the report. You can tell the reader what to expect: what issue is being explored or evaluated, and if necessary, why.

You can also summarise very briefly the main finding of the report at this point, as this can stimulate the interest of the reader and grab their attention.
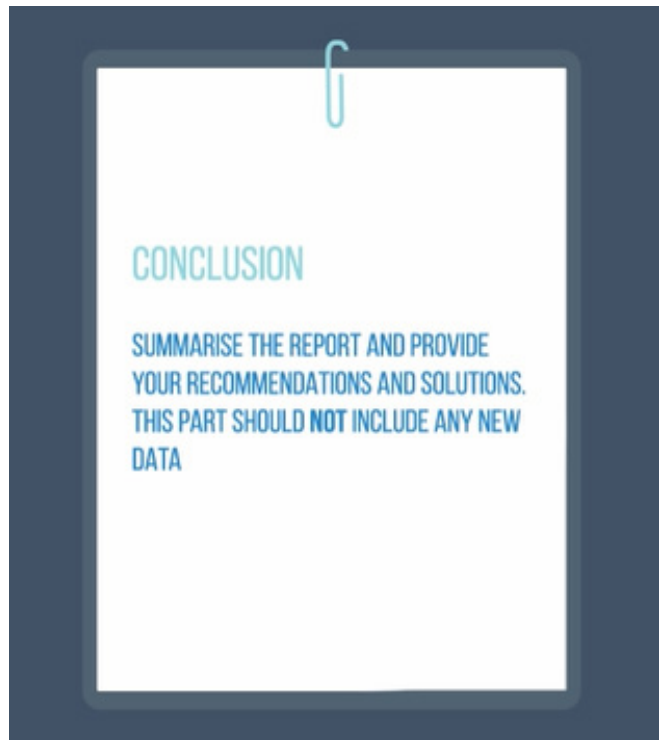
5. Body

The body of the report is where you write about all the issues and findings and support them with evidence and data gathered in your data analysis.
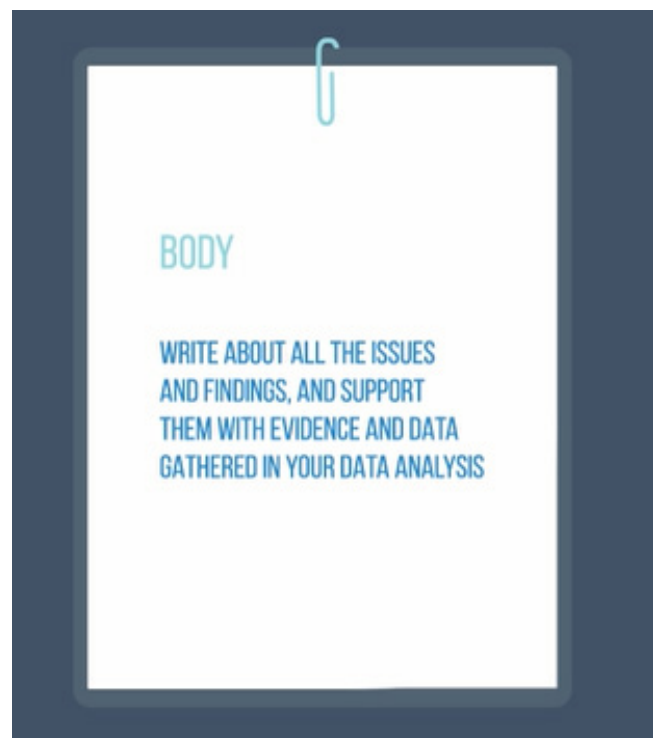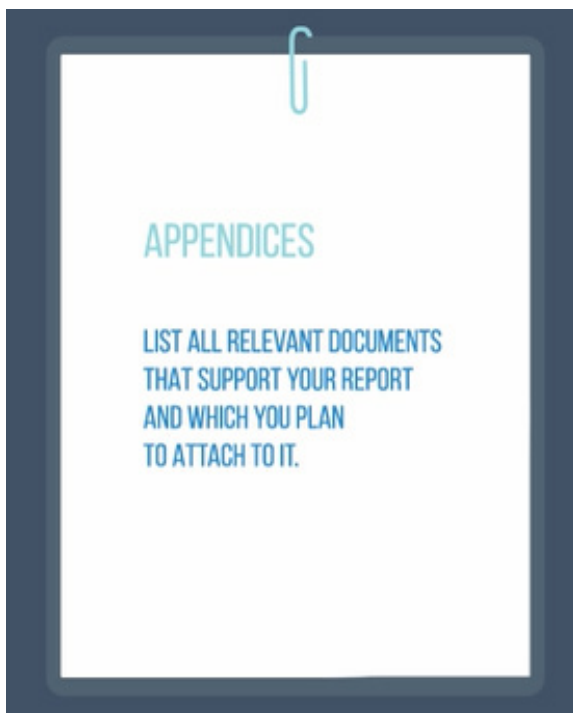
6. Conclusion

In the conclusion, you summarise the report and provide your recommendations and solutions. This part should not include any new data.

7. Reference List

In your reference list, you'll need to list all documents and resources that you used or referred to throughout your report.

8. Appendices

Don't forget to include the appendices. List all relevant documents that support your report and which you plan to attach to it.

Takeaway

If you make sure all your reports include the 8 sections, you won't go far wrong. If you'd like to take another look at what each section should include, you can use the buttons on screen.

STYLE TIPS

If you want to create a successful business report, you must make sure that it is easy to read and understand.

You can achieve this by following some simple rules on writing style.

Try to keep these in mind when writing your next report.

1. Use simple but formal language. Plain English works best. Avoid jargon, abbreviations, complex phrases, colloquialisms, and emotionally charged language that expresses your personal opinions or attitudes.

2. Be precise, accurate, and stick to facts. Serve information on the need-to-know basis only. For example, instead of writing, 'Quite a few of our customers say they are dissatisfied with some of our delivery options,' write: '35% of our customers are dissatisfied with our same-day delivery option.'

3. Use one paragraph for one idea only. Keep your sentences short. They will have more impact and elicit more interest that way.

4. Be consistent and sensible in using headlines, bullet points, numbering and other formatting features (bold, italics, different colours). Too many visual elements can distract the reader and take the focus off your message.

5. Think of your audience. Follow the guidelines of courtesy, and match the style and vocabulary to the reader.

6. Finally, write in the second person (you, your, and yours). You can motivate and engage the reader by presenting the report from their point of view.

KISS

No, not the smooching kind.

And no, not the American hard rock band.

Kiss in this context means that we want you to keep your reports SHORT and SIMPLE.

Ideally, stick to 1000 words maximum for a standard report.

EDIT AND CORRECT

Thank goodness for that, you've finished. Understandably, your natural urge might be to send the report to the reader immediately.

But we would encourage you to leave your report and come back to it later. This will allow you to clear your head and get a new perspective on some of the points you might like to edit.

As with any formal piece of writing, your work will benefit from a thorough proof and edit.

Proofread the whole report or have it proofread by someone else to avoid grammatical, orthographic or punctuation errors.

A clean and correct report will demonstrate your professionalism, commitment to the business and respect for the readers.

HOW TO PROOFREAD AND CATCH ALL THE MISTAKES

You can't trust your spell checker or even your own brain when it comes to proofreading your own texts. So, it makes sense to enlist the help of a second reader to help you proofread. It works like this. One of you slowly and carefully reads aloud from a hard copy while the silently reads either the online version or another hard copy. Because the text is new to your helper, her brain is not as likely as yours to fix mistakes as she/he reads along. Between the two of you, you'll catch far more errors than you would on your own. You then correct them in the online copy while your helper watches to make sure that you don't inadvertently add another error. (Trust me, it happens.) This method works GREAT, but is dependent on finding a willing helper.

You can of course employee the services of a proof reader. If the report is important, it can be best to leave it to the professionals.

READ IT OUT

If you are going to present your report in a meeting, read it out loud beforehand. This will help you time yourself properly and adjust the speed and tone of your presentation.

If possible, involve an audience and ask them for feedback.

SKILLS TO CREATE POWERFUL PRESENTATION

When someone delivers an amazing presentation, it can look effortless.

However, the reality is, even the world's best public speakers have to work at it.

During this section we will explore six must have presentation skills and how you can use them to create presentations that will wow your audiences.

SKILL 1 - PLAN

The audience is captured by the story you tell, not the slides it's told on.

You should use twice as much time planning your presentation on paper as you do creating the actual slides.

Most people start a presentation in PowerPoint, by entering text on the slides.

This is a bad idea.

The content should drive the design.

Start your planning by deciding on one key message you want to leave your audience with and make that the headline of your presentation.

It should be short, memorable and attention grabbing.

Next you need to create a presentation outline.

Like all good stories, your presentation should have a start, middle and end.

Introduce yourself and the topic.

Identify the topics for the body of your talk which will guide the audience from one point to the next.

And close the presentation summarising the points you have covered.

A simple way to remember the structure is:

Tell them what you're going to tell them, tell them, then tell them what you just told them.

Takeaway:

"To make your presentation powerful, don't sell yourself short by jumping head first into presentation software. Take the time to thoughtfully craft your message on paper before you even think about creating a single slide".

SKILL 2 - PRACTICE MAKES PERFECT

As with all things, practice makes perfect.

Relentless practice can make anyone into a 'naturally charismatic' presenter.

Steve Job's practiced his presentations for hours, even days to make everything look effortless and smooth.

Even Winston Churchill's spontaneous 'off the cuff' speeches were in fact rehearsed thoroughly.

Practice frequently while you're preparing the presentation.

Most people get started late and continue to work on the presentation until the last minute.

They might practice once or twice the night before.

Even worse, some people try and wing it without any practice at all.

Try to practice individual slides or sections as you are working on them.

Don't worry if you're not completely done with that slide or the entire presentation.

Practising in small bursts is far more effective than practising for the same amount of time at the end.

To aid in your rehearsal, consider using a video camera to record yourself as you practice.

Review the recording to see where you stumble, seem nervous or where your voice tails off, and rehearse those parts especially.

Gain a valuable second opinion by asking a friend to watch the video with you.

Research shows that people are more likely to remember your first and last words.
So you need to practice your opening and concluding points the most.

Takeaway:

"To make your presentation great, you must practice relentlessly"

SKILL 3 - KEEP IT SIMPLE

The brain is fundamentally a lazy organ, so you need to make things easy for your audience.

Most presenters like cramming their slides as full as possible, not understanding that less can be more.

Don't overload the minds of your audience with too much data.

If they feel you're providing too much information they'll tune out and remember nothing.

Make your slides as simple as possible, introducing one topic per slide.

You want people to pay attention to what you're saying, not trying to read what is written, so avoid using bullet points or long sentences.

A picture is worth a thousand words.

So try to build visually engaging and aesthetic slides, preferring simple images over boring text.

Associating a picture with verbal information drastically increases people's ability to recall that information.

Apply the sample principle of simplicity to your language as well.

When Steve Job's presented the iPod to the world he could have said something like:

"today we're introducing a new portable music player that weighs a mere 6.5 ounces, is about the size of a sardine can, and boasts volume capacity, long battery life and lightning fast transfer speeds"

But he didn't. Instead he said:

"iPod. One thousands songs in your pocket"

So next time you're preparing your presentation think like Steve Jobs - Speak simply, use plain English and avoid jargon and buzzwords.

Takeaway

"Don't overwhelm your audience; simplify your slides and language."

SKILL 4 - SPEECHES ARE ABOUT STORIES

You can make your presentations more memorable by weaving stories into your talk.

Here's the science to explain why...

When a good story captivates us, the neurotransmitter dopamine is released in the brain, which causes our concentration and interest to heighten.

When presenting, you can take advantage of this by including stories to connect emotionally with your audience.

The world's most captivating communicators rely on a three act structure.

The narrative of the story is divided into three parts.

The setup, the confrontation and the resolution – and comes complete with vivid characters, heroes and villains.

The three act story structure works like this:

You start with the why.

Why should the audience care about your message? To do this:

Introduce the characters, often in the context of a personal story. Set audience expectations about what they'll get out of the presentation & why they should care.

Next, provide the confrontation.

Detail the problem or villain, and eventually, the solution or hero. Data examples and supporting points go here. This will allow the audience to see how your idea, product or training will make their life better.

And finish with the resolution.

Resolve the conflict. Provide a road map to a better future, this could be a story of hope and leave the audience with a clear call to action. They will then understand what action they need to take.

Takeaway:

By structuring your story with a clear and compelling beginning, middle and end, you'll take your audience on an exciting journey...the kind that inspires action, sells products and funds businesses.

SKILL 5 - PROJECT YOUR VOICE

There's nothing worse than a speaker you can't hear.

Even in the high-tech world of microphones and amplifiers, you need to be heard.

A good voice, one that resonates throughout the room, delivers the message to everyone in the room.

Most motivational speakers have taken lessons so they can learn how to project their voices, because how the speech is delivered can make or break the message.

Here are four strategies you can try to improve your voice projection:

1. Fill your lungs.
The way you breathe affects the way your voice comes out.
After all, air flowing over your vocal cords is the reason you have a voice at all.
If you breathe shallowly, you will quickly run out of air, and then your throat muscles tense up to try and squeeze the sound out.
To get a good breath, try imagining that you're filling your lungs from the bottom up, as if it was water instead of air.

2. Articulate with energy
Most people have rather lazy diction.
This means they don't use the tools of articulation, jaws, lips and tongue, with enough energy.
You wouldn't think this has a bearing on how well your voice carries, but it does.
The more energy you put into your muscles of articulation, the better your voice will resonate and project to your listeners.
Lift your voice up and away from your throat muscles and into the resonators of your face, specifically your cheek bones.

3. Think big, never push
Never try to push your voice to make it louder.
Instead, imagine that the inside of your throat and mouth are as large as the room you are speaking in.
This will cause all the muscles around the inside of your throat to pull away, just as you do when you're yawning.
The bigger the space inside, the bigger the voice outside.

4. More energy please
It takes energy to speak well in public.
You really do have to work hard.
But you'll see the improvement in the connection with your audience and realise it really is worth all the extra energy.

Takeaway:
The next time someone tells you to 'project' or to 'speak up' remember that projecting your voice is much more than just making it louder.

SKILL 6 - HAVE FUN

Sounds impossible?

With a little practice you can inject your passion for a subject into your presentations.

Enthusiasm is really contagious.

Think of a time when you heard someone talk about a subject you had previously no interest in, but they were so enthusiastic about it, you couldn't help being intrigued, even fascinated.

When you see someone talking excitedly, smiling, full of energy and fun, you are keen to share what they know.

Your mind thinks "that looks good, that looks fun" and can't resist the urge to join.

Takeaway:

When you're enthusiastic, importance translates into passion – and the whole thing becomes fun. There are few things more enjoyable than talking enthusiastically about something you're passionate about, and feeling others share your enthusiasm.

FINAL SUMMARY

Here's a short summary of what the workbook has covered.

- We talked about using your powers to write and present a well-planned, structured, and well-written report.

- We stressed your report needs to be to the point, in the appropriate style, accurate and consistent.

- We recommended that your report should always serve a purpose.

- We talked about why your data should be presented on a need-to-know basis and very clearly labelled.

- We also demonstrated how you can use different graphic elements to add interest and credibility to your report.

We really hope you enjoyed learning about business reports and use some of what you've learnt to make your reports look the business.

ACTION PLAN

KEY SKILLS (WHAT ARE THE KEY SKILLS YOU HAVE LEARNT DURING THIS COURSE)

WHAT WILL YOU DO DIFFERENTLY WHEN WRITING BUSINESS REPORTS?

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This workbook was produced by:

LITMOS HEROES
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