

# Report writing: a tried, tested

Writing, of any kind, can be tough. And report writing can be particularly difficult – especially with so many strands of information to weave into a coherent whole. **Clare Forrest** passes on the benefit of her own experience in a common-sense and fail-free approach.

**T**he courses are over and you've waved farewell to the delegates, bathed in a glow of satisfaction. Now it's time to write that report. Sighing, you reluctantly sit at your PC. Without too much thought you immediately start typing. About ten minutes later you stare hopelessly at the screen, realising that you have completely lost track of what you wanted to say. And is that 'effect' or 'affect' you should be using? Heck. You're a trainer, not a writer. A hands-on people person. Why bother with the report anyway? Well, you promised it to your boss. And bosses like this sort of stuff. Grumpily, you carry on ...

Is this how you approach report writing? If so, you're not alone. Even many professional, published writers rarely enjoy writing. Novelist William Saroyan observed that 'writing is the hardest way of earning a living with the possible exception of wrestling alligators'.<sup>1</sup> I certainly dislike it. When I prepare 'Netcheck' for *Training Journal* I'll happily spend hours surfing the Internet, looking for interesting websites to review. Then I'll find loads of excuses to do something else – *anything* else – rather than actually *write* the column. And that's true for everything I've ever written, which is rather a lot.

So, given that some of us may find it such hard work, why is it we need to write reports at all? It's usually for one of the following reasons.

- Because someone wants data before s/he makes a decision – for example, the best place to open a new branch for the business.
- Because you want to persuade someone to do something – for example, run more courses or buy your idea.
- Because something has happened that needs recording – for example, an appraisal report or a course evaluation.
- Because the business needs to be continually updated – for example, a progress report about how training is affecting performance.
- Because something has happened that needs investigating – for example, an accident.

Given these legitimate needs to write reports, is there a way to make the process more bearable? Yes, there is, and the good news is that most of the process involves *no writing at all*. Did you spot the word 'process'? That's the key, and the reason why most people who don't often write reports can have a miserable time is because they don't use a systematic process.

It may sound odd, but trust me: the worst way to write a report is to sit down and start writing. You'll almost certainly lose your thread, bring in irrelevancies and spend hours longer than you need to using this approach. There is, as a current TV advert says, a better way. Have a look at Figure 1 (below); see how writing isn't mentioned until almost the end. I want to show you how this model works and how, by using it, you'll be able to put together an effective report reasonably quickly. Note that I'm *not* saying you'll be able to write a brilliant report – that will depend on your subject and, especially, your writing style. However, using the nuts and bolts of my six-phase approach will mean you do a decent job.

## PHASE 1

Define objectives and readership

*Writing is long periods of thinking and short periods of writing.*

*Ernest Hemingway*

The process of writing a report begins with defining both objectives and readership, so you need to consider:

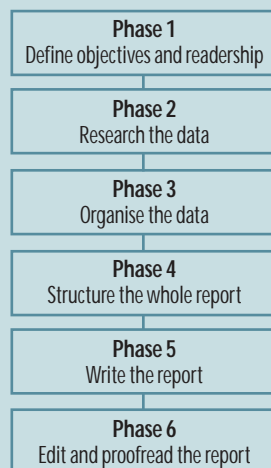
- why you are writing the report (what you want to achieve), and
- who you are writing it for.

These may seem like simple objectives, but unless you deal with them clearly in your own mind you will probably end up writing the wrong document. It's good practice to write a statement which you can then refer to as you move through the phases – like this:

*The purpose of this report is to:*

- examine the current training programme in this company and its effect on return on investment
- identify key areas for improvement and/or change
- identify the cost implications of change/improvement

**Figure 1: The six phases of report writing**



What you need to do is work with your brain,  
which likes a complete picture

# and successful approach

- assist the Senior Management Team (SMT) to make a decision about training and development strategy over the next five years.

*Its key readers will be the SMT.*

Once you've written this statement, keep it where you can see it while you are preparing your report so that you can regularly refer back and ask 'Is this pertinent?' and 'Will my reader grasp this?'. This is exactly the same process that you would use in training design: carefully considering your training objectives to ensure that your programme will have the desired effect. In the same way as we approach anything in business, writing a report needs careful planning.

## QUICK TIP

If someone else has asked you to write the report make sure you find out exactly what they want.

- What is the purpose of this report?
- Who has asked for it?
- Why have they asked for it?
- Who will be reading it?
- Who will make a decision about it?
- Will I need to make recommendations?
- When is it needed?

Asking these questions is known, formally, as establishing the terms of reference. It provides you with a clear brief and helps to ensure you write the right report.

## PHASE 2

### Research the data

Now you know what you want to achieve, you are in a better position to research appropriately. Look at the box entitled 'Typical jottings for research', which shows that there's a lot of work to be done. More often than not, though, you will already have a great deal of the information and/or will find it relatively easy to obtain it. The real difficulty comes during the next phase – what to do with it all.

## PHASE 3

### Organise the data

If you are anything like me, then Phase 3 is likely to make you feel the most overwhelmed. There's Post-it® Notes scattered around your desk, scribbles in your diary, notes on the PC, odd scraps of paper in your pockets, spreadsheets ... It's all data you need and somehow you've got to get it into a sensible order. But it looks a mess, so it's hard to know where to start. I wish I had a nice, high-tech solution for you but really there isn't one. What you need to do is work with your brain, which likes a complete picture and, if you give it all the information you have, it will happily make the necessary connections for you. Here's how. ➤

## Key learning points

- The worst way to write a report is to sit down and start writing.
- Report writing is a six-phase systematic process.
- Know why you're writing and who you're writing for.
- Create a writing 'map' before you start.
- When you do start writing don't start at the beginning of the report.
- Keep it short, clear and grammatically correct.

## Typical jottings for research

(linked to Phase 2 of the report-writing process)

**Objective 1: Examine the current training programme in this company and its effect on ROI**

*Must pull together all the ROI info we have. A questionnaire to all department managers would be useful too – need some concrete examples. I know some departments do their own thing – need to find out what they do.*

**Objective 2: Identify key areas for improvement and/or change**

*Questionnaire will help here. Need to examine this year's appraisals and look for common themes. Need to talk to senior managers to establish their expectations about where they see the business going over the next five years. Useful to talk to a cross-section of staff too.*

Your introduction creates the same effect as when you open a course: it sets the scene so that people **know what is happening and why**

- ▶ 1. Arm yourself with scissors, Post-it® Notes, sheets of A4 paper, highlighter pens in four different colours and all your data. Make sure you print out anything that's on your PC. Then find a suitable space. (I usually use the floor.)
2. Write out, on separate pieces of paper and in large letters, all your objectives. Spread these out in front of you so that you can easily see them all.
3. Take all your bits and pieces of data and match them to your objectives. If necessary, cut things up as you go and use Post-it® Notes if a piece of data is relevant to more than one objective.
4. Take each objective with its data and break this down further by putting like with like, creating headings and subheadings as you go. For example, if you've got several bits of information about communication in the business then you might create the main headings 'Written communications', 'Communication breakdowns' and 'Meetings'. Each of these main headings might break down yet again – for example, 'Written communications' could have three subheadings: 'E-mail', 'Letters' and 'Reports'. Again, use your scissors and Post-it® Notes to manage duplicate information that needs to be in more than one place.
5. Move the piles of paper around until you have a sequence that makes sense to you and will make sense to your readers (see the box entitled 'Possible data sequences' below).
6. Finally, using your four highlighter pens go through your data and quickly prioritise it using a simple ABCD system:
  - A = absolutely must include to meet this objective
  - B = barely essential but could include
  - C = colourful – brings the absolutes to life (stories, anecdotes and quotes usually)
  - D = ditch it – not needed (throw this stuff away NOW!).

By now you will be making sense of it all. Things will be falling neatly into place; you'll be seeing how your report is going to work when you come to write it and the whole job will be looking relatively easy. But Phase 3 isn't quite finished yet. There's one last

### Possible data sequences

(linked to Phase 3 of the report-writing process)

#### Distinct subject areas

1. Training programmes
2. Training evaluation
3. ROI on training
4. Future business needs for training

#### Process

Use this when there is a logical step-by-step order – for example, as in this article.

#### Order of importance

- Either put your most important point first – to hit your readers in the eyes so they want to read on (just as they do in a newspaper).
- Or put your most important point last, building up your case so that your readers are taken along by your argument.

### From data to conclusion: some examples

(linked to Phase 4 of the report-writing process)

#### Example 1

The data says: 'Training courses frequently over-run the allotted time and delegates return to work later than expected.' The conclusions could be that:

- trainers do not plan their courses carefully
- not enough time is allowed for training.

#### Example 2

The data says: 'Delegates consistently complain about the catering at the venue.' The conclusions could be that:

- the caterers are not providing sufficient choice for delegates
- the overall standard of catering is low.

thing to do – write down, on one sheet of A4, the results from the six stages of this phase so that you have a simple map to follow.

### QUICK TIP

Headings are important signposts for the reader, so they should be as explanatory as possible – for example, 'Delegates' reactions to the 2003 training programme' rather than 'Delegates' reactions'. The former tells the reader exactly what to expect. The latter is vague – reactions to what?

### PHASE 4

#### Structure the whole report

*When we read, we start at the beginning and continue until we reach the end. When we write, we start in the middle and fight our way out.*

Vickie Karp

It's nearly – but not quite – time to start writing. Every document, like every training programme, needs a complete structure. So far you've planned the middle of your report – the presentation of the facts. You need to top and tail this with an introduction and a conclusion. These two elements of structure are *essential*.

#### What should be included in an introduction?

Your introduction creates the same effect as when you open a course: it sets the scene so that people know what is happening and why. You need to explain:

- whom the report has been written for and why (your purpose and reader statement set out in Phase 1 will be useful here)
- any necessary background for the reader to understand the data
- what the report will cover
- any methodologies used – for example, how you did your research.

#### What's the purpose of a conclusion?

This is the bit that people get most confused about.

The data you prepared in Phase 3 is neutral: it's just the presentation of the facts. A conclusion draws logical judgements from the data to help the reader to decide what to do. The box entitled 'From data to conclusion' left, provides some simple examples showing that a conclusion falls out of the data. However, be very careful that you do not conclude something the data doesn't support. You might need to add recommendations which tell readers *exactly* what they should do. But these are not always necessary since your conclusions will pretty much make clear what needs to be done.

*What other elements could you use to structure your report?*

There are many of these, as the box entitled 'Optional elements of report structure' shows. Make a decision *before* you write about those to include. Bear in mind, the ones you *must* include are:

- an introduction – sometimes known as 'background' or 'opening statement'
- a middle – your data, logically organised into headings and subheadings (this section is sometimes known as 'findings' or 'information')
- a conclusion – sometimes known as 'interpretation' or 'opinion'.

## PHASE 5

### Write the report

*Confident writers have the courage to speak plainly; to let their thoughts shine rather than their vocabulary.*

*Ralph Keyes*

Now – at last – it's time to write. Pick up your map from Phase 3 and complete its contours by creating sentences

### Optional elements of report structure (linked to Phase 4 of the report-writing process)

- Contents page
- Executive summary
- Recommendations
- Appendices
- Acknowledgements
- Resources
- Glossary

around each of the headings and subheadings. Note that what you *should not do* is begin by writing the introduction. Leave this until you've written up your data and your conclusion; this way, the introduction will fall into place much more easily.

### *The dreaded 'G' word*

Grammar is the use of the rules of a language in speaking and in writing. Many people think that grammar is (a) difficult and (b) unimportant. It can be

difficult at times but it certainly isn't unimportant. It matters in the same way that recognising that  $2 + 2 = 4$  is important. Grammar adds structure, logic and sense to writing.

If you find grammar difficult (who doesn't?), if you're not sure when to use 'it's' or 'its', if the difference between 'principal' and 'principle' baffles you, or if you tend to sprinkle commas like confetti (I do), then buy yourself a simple grammar book. Those written for non-native English speakers tend to be the easiest to understand. Also get hold of any book on English usage such as Angela Burt's *The A-Z of Correct English*.<sup>2</sup> Keep these by you and refer to them often. ➤

Observe this golden rule: use **short words, short sentences and short paragraphs**; oh, and don't worry about using the same word twice

*A word on grammar checkers*

Don't use 'em. They are more likely to confuse than enlighten you – unless you understand grammar. And who wants those wiggly green lines on screen anyway?

*Keep it simple*

*To write simply is as difficult as to be good.*

*W Somerset Maugham*

Many people – strangely, often the very same people who think that grammar is unimportant – also think that business writing has to be 'proper'. This usually means they use long (and often wrong) words such as 'regarding' for 'about' or 'at this moment in time' for 'now'. By doing so they end up with lengthy and meaningless documents.

I promise you that **this systematic approach works**; and that's why I want to share it with you

Did you know that, however clever the reader, any sentence much longer than 30 words is unlikely to be understood on its first reading? Observe this golden rule: use short words, short sentences and short paragraphs. Oh, and don't worry about using the same word twice. Clarity is what you're after and changing one word to another with a similar meaning leads to inexactness, such as in this (genuine) example:

*An increase to staff remuneration, wages, salary and pay was agreed at the meeting held with the Trade Union. All employees will commence to begin to start to receive an increase of a 3 per cent pay rise at the end of the next four-week period.*

Spot them all? Try this simpler version instead:

*A 3 per cent pay increase, agreed with the Trade Union, will be paid to all staff next month.*

### Proofing checklist

(linked to Phase 6 of the report-writing process)

Successful proofing depends on being methodical. You should check for the following.

- Are there any spelling mistakes?
- Are there any keying-in mistakes? For example, have you typed 'form' instead of 'from'?
- Is the punctuation correct?
- Have you been consistent with:
  - heading styles
  - numbering
  - margin widths
  - paragraph (and other) indents
  - fonts?

## PHASE 6

Edit and proofread the report

*A sentence should contain no unnecessary words, a paragraph no unnecessary sentences, for the same reason that a drawing should have no unnecessary lines and a machine no unnecessary parts.*

*William Strunk Jr. and EB White<sup>3</sup>*

The great thing about writing for a publication like *Training Journal* is that someone else edits and proofreads my work. With a report I have to do it myself – and usually by this stage I'm sick of it. But this last phase has to be done systematically if the document is going to work. Editing is when the document is checked for sense, structure, style and grammar. It is done before proofreading. Proofreading (or proofing, as it is often known) is checking for errors. The box entitled 'Proofing checklist' will help you here.

When you're satisfied that the report is right, STOP! Send it to its readers – it's their turn now.

## FINAL THOUGHTS

It's taken me around 3,000 words to explain to you a process for writing a report. (There's lots more I wanted to say, by the way, but enough is enough.) You might be asking if I followed the process for writing this article. I did. Even though I'm a relatively experienced writer, I have learned the hard way that not using it *always* means I spend longer than needed and usually end up confused. (Some might say that's my normal state anyway!) But I promise you that this systematic approach works. And that's why I want to share it with you. Happy writing. 📄

*The author of this article can be contacted at [clareforrest@structuredlearning.com](mailto:clareforrest@structuredlearning.com) or visit [www.structuredlearning.com](http://www.structuredlearning.com)*

### References

1. William Saroyan, 1908-1981.
2. Angela Burt, *The A-Z of Correct English: Common Errors in English – Quick Access to Everyday Spelling, Punctuation and Grammar Solutions*, How To Books, 2002.
3. William Strunk Jr. and EB White, *The Elements of Style, Allyn and Bacon*, 1999.