

# **Business Report Writing**

## **Script**

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### **SLIDE 3**

In this course, I'll explain how you

Set goals and decide how to achieve them.

Decide how to prepare the report content.

Write a clear, complete introduction.

Write the report in blocks.

Use key terms consistently.

Write a conclusion that achieves your goals.

Write clear paragraphs, sentences, and words.

Proofread carefully.

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### **SLIDE 4**

Decide what you want from readers before you begin to think about what you will write. That's the first step in being able to write reports that have the impact you want to have. If your goals are unclear, your writing will seem to ramble, and your readers will get the idea that you don't really know what you're trying to do.

Each of your goals requires different strategies in writing. These are just some examples:

If your goal is for the reader to act or respond as you expect, you'll choose strategies to achieve the goal. You'll focus on explaining the action and eliminating distracting information. You'll make the writing and instructions for the action concrete and detailed.

If your goal is for the reader to have relevant reference information and be able to use it, you'll use different strategies. You'll make sure the reader can retrieve the information easily by having a clear title and using headings, tables of contents, and indexes.

If your goal is for the reader to understand and remember information, you can decide the strategies that will achieve that goal. You'll include only relevant facts and delete distracting information. Double-check to be sure you have everything the reader needs. And make sure the reader can understand the concepts and vocabulary. When you are clear about your goal, you can be successful in achieving it because you can select the right strategies.

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## **SLIDE 5**

If your goal is for the reader to follow procedures or instructions successfully, you'll need a different set of strategies. You'll explain each step using concrete descriptions, break out the steps and actions with lists and white space, and include examples.

If your goal is to help the reader solve a problem or make an effective decision, you'll achieve it with these strategies: you'll explain all sides of the issue and include phone numbers or other contact information of people the reader can contact with help in making the decision. Give the reader all the relevant information necessary to make the decision.

If your goal is for the reader to be persuaded, motivated, or committed, you'll choose the strategies that will achieve the goal. You'll write from the reader's point of view. Start points with what's in it for the reader.

If you're clear about your goals, you can choose strategies that will ensure you'll achieve them.

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## **SLIDE 6**

To achieve your goals with this reader, you have to know something about him or her. These are the things you need to know:

Who are the readers? Find out if there are potential readers other than the primary reader. Think about their reactions to what you write, even though you're writing to the main reader.

What do these readers expect? You can determine that from specific words in the reader's request. If you're writing a report for these readers for the first time, look at previous reports produced for these readers to see what writers included in them. If you aren't sure what the readers expect, ask them.

Next, decide what they need. Look at the goals you have for this report. Decide what you have to give this reader to achieve them. Look closely at the reader's request. What does this reader seem to need?

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## **SLIDE 7**

Then think about how much they know. If they know something about the subject already, you don't have to explain as much. If they know little about the subject of the report, you'll need to start from the beginning. Decide what this reader needs to know.

Find out what the readers' education and expertise levels are. If the readers don't seem to be highly educated, adjust the vocabulary to words they use. If the readers are experts in the subject, you can use more jargon and more complex explanations.

Finally, have some idea of how the reader feels about you and the subject. If the reader is negative about you or the subject, think about that as you write. Also consider what might be threatening in this document? If something may make the reader upset, you need to say it, but you might consider the way in which you say it.

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## **SLIDE 8**

Now that you have decided your goals and you have a clear understanding of the reader, you can decide how you need to build the report. A master builder needs the right tools. These are tools you'll use to accomplish your goals.

Decide what readability level you should use. For educated business readers, keep the text at about a tenth-grade readability level. The average reading level of Americans is 7th or 8th grade. It's very easy to overestimate what your readers can understand. Adjust your writing to the vocabulary the reader uses and the reader's knowledge of the subject.

You can check the grade level of your writing and the reading difficulty in Microsoft Word. Use Word's "Help" function and search for "Readability."

Use a level of difficulty that fits your goals and the reader. Use vocabulary the reader uses. If the reader doesn't know much about the subject, define and explain more. Don't include any technical detail the reader doesn't need, even if you think it's interesting.

Use the goals and your knowledge of the reader to decide whether the explanation should be like an executive overview or detailed and concrete? Use an executive overview approach if your goal for this reader is for the reader to understand at a high level and the reader is not knowledgeable about the technical detail. Provide more concrete technical detail if the reader is the person who will carry out the work.

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## **SLIDE 9**

Decide on the level of formality. Don't use an archaic style, with words like "hereinafter," "as per your request," "thanking you in advance," or "we are in receipt of." If you wouldn't speak the words, don't write them.

Don't use an informal conversational or journalism style in business reports. It's too casual and doesn't sound like you're serious.

Use a formal style when the reader expects it. Formal writing doesn't use contractions and doesn't address the reader directly. Write a formal report for a board of directors or other readers who expect you to be objective and distant.

Normally, use a business style. A business style sounds like the conversation you would have in a meeting with a new client. It would be friendly, but not overly casual.

Decide the tone you should use with these readers. Use a cooperative, partnering tone in your writing. Avoid talking down to the readers who don't have the technical background you do.

Choose a stance that will show the reader you're interested in communicating openly and cooperatively. Use "you" and "I" freely, not "they" when referring to the reader, "one" referring to people in general, or "the company" when referring to your own company.

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## **SLIDE 10**

The next step in the process of write a clear, effective business report is to decide what to write to achieve your goals.

When you sit down to start working on a report, you likely have the impulse to just start writing. That's inefficient and time consuming. You end up having to go back and reorganize after you've written. Most writers can't do that very well because they want to include everything they've written. It all sounds good to them. But to write a clear, readable report, you have to leave out much of the detail that you first write.

Just writing without planning also creates writer's block. If you find that you can't decide how to start the report, it's probably because you don't have the plan yet.

Learn to plan the writing first. Write brief notes. Then add details. This section of the training shows you how to do that.

Select the information to include that will accomplish your goals. If you include too much information, the reader may not finish the report and your central points will be lost. If you include too little, the reader won't be able to understand what you're writing. Include the minimum amount of information and all the information the reader must have to achieve your goals.

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## **SLIDE 11**

The first step in planning the report is to prepare notes. Start by writing the central idea of the report in a word or a few words. These are three examples. They are simple, straightforward descriptions of the content of the report in a few words.

If you have two central ideas, write them both. In the example, the report will contain the results of the study and the recommendations.

Don't write detail. The words you use are the key terms for the central idea. In the example, the key terms are "results of the study" and "recommendations." The key terms should appear throughout your report.

As you write the report, do quality checks at each decision point. Here, check to be sure the central idea is what you need to explain to achieve your objectives. If you have two central ideas, both must be included in the objectives for your report.

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## **SLIDE 12**

Follow the same procedure to write a word or few words apiece for each point that explains the central idea. These become the key terms for the main points, called Level 1 points.

We'll use the central idea, "Changes in the billing system" for an example.

Skip a blank line under the central idea and write a word or few words to describe the first point you need to explain for the reader to understand the information and accomplish your goals. That becomes the key term for that first point. In the example, the first point is "Improving the collection letters."

Write the other points. Don't add details. Just write a short key term for each point. You will use them as the key terms later in headings and opening statements to help you guide the reader through your explanation. In the example, the writer wrote three points to explain the changes in the billing system.

The three points in the example are called Level 1 key terms because they are at the highest level; they explain the central idea.

Write a "1" to the left of each of the Level 1 key terms to show they're Level 1.

If you're using a template, the Level 1 sections will be the divisions in the template. The key term for each section will be the heading you use for that section. For example, the audit report may have "Methods" as one Level 1 section, with the key term "methods." Another Level 1 section would be "Results," with "results" as the key term for that section.

When you've written all the Level 1 points, do a quality check before you go on to the next level of points. Compare the Level 1 points to the objectives. Make sure every point supports an objective and that there is at least one Level 1 point for each objective.

Determine whether you have all the Level 1 points you need to ensure this reader will understand the central idea. You analyzed the reader before starting to write your notes. If this reader needs much detail, do you have the necessary detail in the Level 1 points?

If the reader needs less detail, look to see if you have too much detail in the Level 1 points.

Adjust the Level 1 points until you are certain they will achieve your goals with this reader.

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## **SLIDE 13**

Next, write the more detailed ideas that will explain or support the Level 1 points. These are Level 2 points. You're adding points at levels so you can focus on one level at a time. That ensures you'll have everything you need to explain each point clearly.

These are the notes someone might write for the report about the three changes in billing procedures. The writer has marked the Level 1 points.

Write "2" before each of the Level 2 key terms. You might also indent them to make the outline clearer.

Do a quality check before you go on to the next level of points. Make sure the Level 2 details all pertain to the Level 1 point they're under.

Make sure every Level 2 point supports the objectives.

Determine whether you have all the Level 2 points you need to ensure this reader will understand. You analyzed the reader before starting to write your notes. If this reader needs more detail, do you have the necessary detail in the Level 2 points?

If the reader needs less detail, do you have too much detail in the Level 2 points?

Adjust the Level 2 points until you are certain they will achieve your goals with this reader.

Do all of this work before you start to write. This ensures you will create a report that has the clarity and impact you want to have.

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## **SLIDE 14**

Next, write the more detailed ideas that will explain or support the Level 2 points. These are Level 3 points. You're adding points at levels so you can focus on one level at a time. That

ensures you'll have everything you need to explain each point clearly.

In the example, the writer has details to explain the Level 2 point, "Listing a local agency." The writer lists them as Level 3 points.

Write "3" before each of the Level 3 key terms. You might also indent them to make the outline clearer.

Do a quality check before you go on to the next level of points. Make sure the Level 3 points pertain only to the Level 2 point they're under.

Determine whether you have all the Level 3 points you need to ensure this reader will understand. You analyzed the reader before starting to write your notes. If this reader needs more detail, do you have the necessary detail in the Level 3 points?

If the reader needs less detail, do you have too much detail in the Level 3 points?

Adjust the Level 3 points until you are certain they will achieve your goals with this reader.

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## **SLIDE 15**

Have you ever gotten the first draft of a report done and feel like you can't wrap your mind around it to figure out how it should be organized? The reason is your mind is better at organizing a small number of topics at a time. To avoid feeling like you can't get a clear idea of how to organize the report, organize the notes one level at a time.

Organize the Level 1 key terms first. A larger report may have dozens of Level 1 points in it. You can organize them more easily if you focus on just the Level 1 key terms first.

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## **SLIDE 16**

Then organize the Level 2 points for the first Level 1 idea.

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## **SLIDE 17**

Do the same for any lower level points in the first Level 1 idea. In the example, the writer organizes the Level 3 points. That finishes the organization for the first Level 1 section about improving the collection letters.



Then go on to the points in the second Level 1 point and organize them in the same way.

When you've gone through this careful organization process, you can be confident that the entire report has a well-organized outline you can write from. You can then concentrate on writing the report, confident that what you write will be well organized and will have the level of detail your reader needs.