Report writing for readers with little time

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First edition

Noordhoff Uitgevers

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Noordhoff Uitgevers Groningen/Houten

Cover design: G2k Designers Groningen/Amsterdam
Cover illustration: iStockPhoto

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0 1 2 3 4 5 / 16 15 14 13 12

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ISBN (ebook) 978-90-01-84873-6
ISBN 978-90-01-81259-1
NUR 810

Preface

Writing workshops are popular with companies and other organisations. Writers who spend a lot of time writing often find that despite their efforts they do not obtain the desired result. Their readers and they themselves suffer from *infobesity*: drowning in the vast amount of paper and digital information. Students are often badly prepared for their professional careers. The many papers that they write often start with the assumption that *much is good* (the more pages, the higher the mark) and *the Internet is a good source of information.* In professional situations we tend to hear *Can this be reduced to one page?* and *Who guarantees that the information is reliable?*
Efficient writing is, therefore, partly a matter of unlearning things. You will have to distantiate yourself from all the interesting information that you have collected and start with the question of why readers with limited time would want to read your text. What do they really need and why should they believe what you tell them?

It is also partly a matter of learning new things such as knowing what the conventions are regarding quotation of sources and what exactly a reader expects in an introduction. These matters can be easily learned from a book and as such, *Report writing* is suitable for self-study. For strategic elements such as writing for a specific audience, feedback from readers (lecturers, colleagues) remains a valuable source of additional information. *Writing reports for readers with little time* is a translation and adaptation of the fourth edition of *Rapportagetechniek.* It is suited to students majoring in a broad range of technical, engineering, business, and other specialized fields. Professionals in these fields could benefit too from the guidelines.

Delft, September 2011
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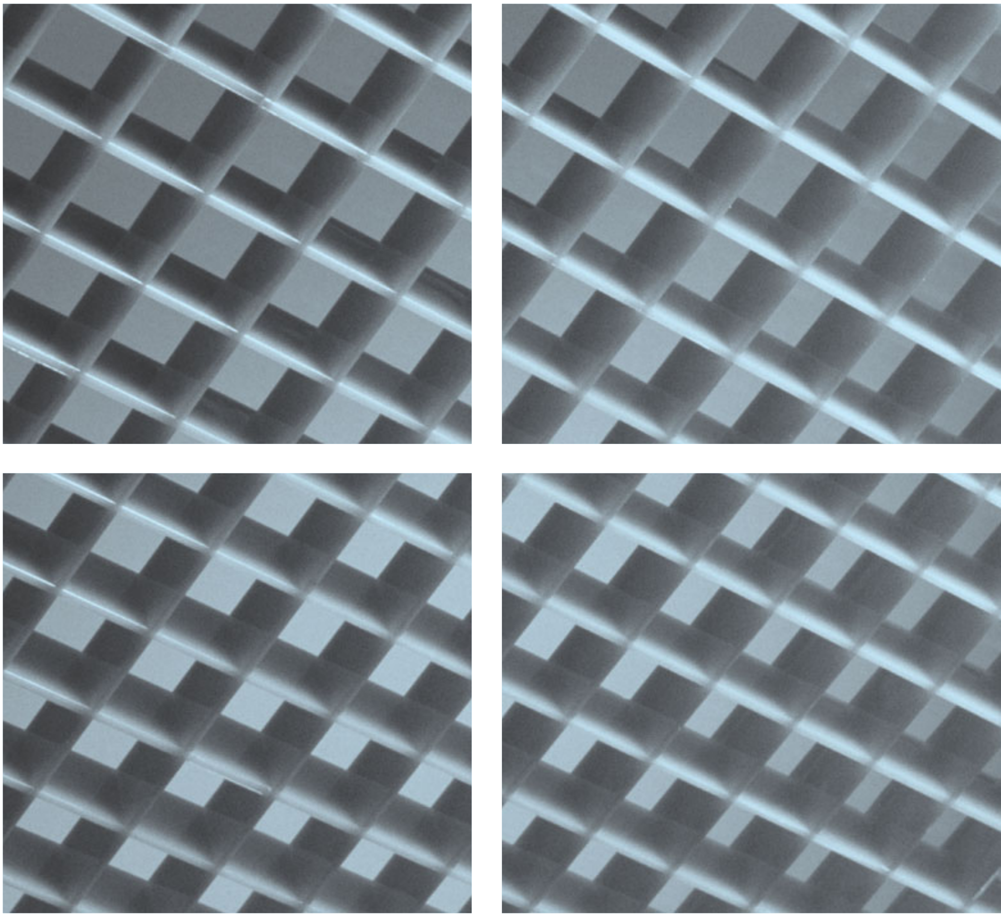


1

Introduction

What do you need to know to be an effective writer? It can be summed up as follows: do not use more words than necessary, make sure the text has an introduction, a main body and a conclusion, and avoid jargon. These rules are deceptively simple: you probably know them already and if you do not, it will not take you long to learn them off by heart.

Using these rules, however, may be quite a different matter. If the assignment given by the person in charge is unclear, if the readers for whom you are writing have widely different backgrounds, if the mass of data that you have to incorporate is complex and the deadline is set in concrete, then most of these rules may turn out to be purely academic.

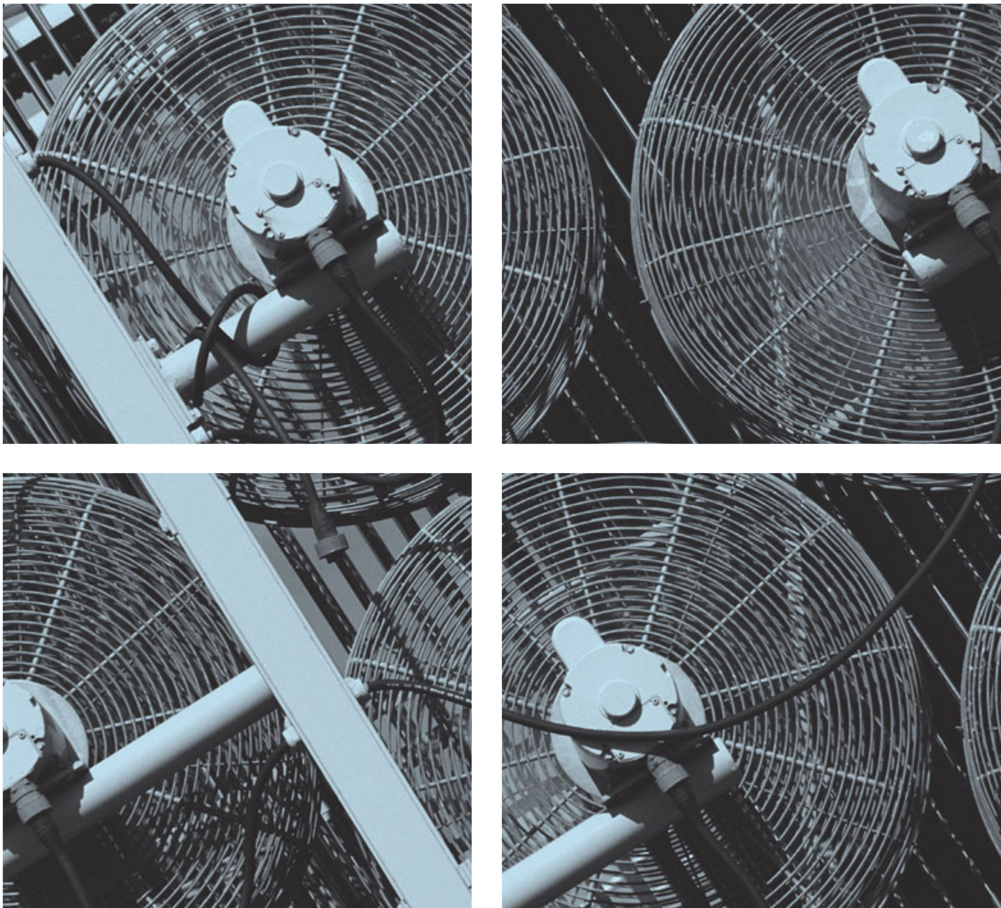
With these considerations in mind, this book sets out to provide an *approach* – a systematic way of going about writing – rather than a set of simple rules. The first requirement for an efficient approach to a writing task is to adopt the right attitude towards your readers. As a rule, your public will consist of a number of different groups, varying from specialists in the field to managers. While the information these readers will be looking for will vary, what they will have in common is a chronic lack of time and a dislike of lengthy reports. As well as that they are likely to be critical readers and you will have to convince them that your information is important and reliable.

The approach we take in this book will increase the chance that you will produce an end product that is satisfactory for all parties. There will be times, however, that you will look in vain for a remedy for your particular writing problems. Everybody has developed their own way of writing texts, and these ways may be confused, laborious or incorrect. Not even the most comprehensive advice will be able to solve all problems. This book may not meet all your needs, therefore – some things may need additional practice and you may need feedback from experienced readers. If you do not have the opportunity to follow a writing course you should make use of every opportunity to obtain comments from critical colleagues.

This book was written for people with little time: if you wish, use it selectively. The following table shows where to find the answers to some important questions. The order is based on the five questions we are most frequently asked in our own situations.

Five frequently asked questions – and where to find the answers

What individual parts should a report contain? What are the requirements for each part of the report?	*Chapter 6* Requirements for each part of the report.
How do I approach writing effectively right from the start?	*Chapter 3* From assignment to text
How can I convey my ideas convincingly?	*Chapter 10* Persuasive writing
What is the best way of structuring my report?	*Chapter 5* Structuring (chapters, paragraphs)
How can I use the information I have gathered correctly?	*Chapter 4* Dealing with sources of information



2

Writing effectively in professional situations

2.1 The importance of writing in professional situations
2.2 Strategic factors
2.3 An absence of internal instructions
2.4 Indispensible writing skills

Some people see writing reports and memos as something that is keeping them from their real work. In this chapter we will see that writing should, instead, be regarded as a core task. Strategic factors that strongly influence writing in professional situations are also dealt with. Because useful guidelines for writing texts within companies are a rare thing, writers usually have to find their own way. They have to be able to create norms for effective and convincing writing themselves. The skills needed for this will be briefly dealt with.

2.1 The importance of writing in professional situations

Highly trained people usually find that writing takes up more of their working hours than many of them had imagined at the start of their careers. Take engineers, for instance: of course they have mainly been trained to develop or optimize technical products and processes. But before there is a product, feasibility studies have to be written, research reports produced, progress reports published and a lot of memos sent back and forth. No matter how brilliant your idea for a new product was, how clever your research plan or how decisive the conclusion of your feasibility study, nobody will ever put it into practice if you are not successful in conveying your findings clearly and convincingly to others: to your colleagues, to those in charge and to your clients. And even though oral communication is very important, you will find that you will have to communicate largely on paper. That will take up a lot of time: sometimes up to a third of your working time. It will take up so much time that it is fair to say that very often the primary result of an engineer's work is not the apparatus or a system, but *text.*

It is not surprising, therefore, that employers often ask in employment advertisements for "good oral and written communication skills". And it is also not surprising that shortcomings in this field are often a cause for complaint by employer organisations.

2.2 Strategic factors

Why do so many people experience problems with writing at work that they did not, or only to a minor extent, encounter during their studies? The reason for this is the *role* that texts play in professional situations, a role that is different from that in the educational setting.

The following three factors are characteristic of professional situations:
- The writing is primarily aimed at measures and decisions.
- There are a variety of readers, each with different interests.
- Readers are not prepared to spend much time on reading.

Many writers are insufficiently aware of the consequences of these characteristics. We will deal with them next.

2.2.1 Action-directed writing

The reports that students write during their study serve an educational purpose. They are designed to exercise the student's skills and demonstrate that the writer is more or less able to independently analyse a problem and can indicate ways of solving these. Technical data and analyses form the *core* of a text.

The things you write in a work situation are usually directed towards *action*: measures to be taken or decisions to be made. The technical data and analyses you provide will be indispensible for this, but mainly as a *vehicle* for basing the necessary action on. This underlines the importance of firstly

making it clear to the reader *why* something should be done (in other words, why they should read the report). That should be emphasized in the introduction. Another central aspect is what the reader is supposed to do with the results. This is why there is a strong emphasis on the conclusions and especially the recommendations.
The action concerned will almost always have repercussions for various departments and individuals. A measure in the field of production can have consequences for the purchasing, inventory management and marketing departments. Decisions with far-reaching consequences presuppose the involvement of several people within the firm's hierarchy, or at least prior knowledge on the part of these people. This means that it is unlikely that your report will only be seen by those who issued you with the assignment. For many readers, the technical data will at most be regarded as background information only, and not something they need to delve into in detail.

2.2.2 Writing for a variety of readers

The readers who will look at your report will usually either be readers with specific background knowledge or readers who read the report only partially or with a specific purpose in mind:

- *Decision-makers.* These are the people who will decide whether the recommendations are to be implemented (managers and other generalists).
- *Specialists.* These are the people who are especially interested in the technical basis and the method adopted (the people who are responsible for implementing the recommendations: staff members who advise management).

The person who assigned you the task of writing the report will very often be an intermediary. This will be the case if it is their task to test your findings globally and subsequently send them on to others within the organisation. Your report will only be effective if you bear all your readers in mind equally, or in other words, if your report can be read in several ways.

The following advice can improve the efficiency of your report.

- *Do not just focus on the person who commissioned the report.* A one-sided concentration on the person who gave you the assignment can result in the report being useless for other important readers. It is also very possible that the situation will change after you have received your assignment. The more time your research takes the greater the chance of that happening. The original person may have been put onto a different project. Chances are that the person sitting on his or her chair will be less well informed. The successor may perhaps not understand your report if you have left out those things that would have been clear to his predecessor.
- *Do not write the report for a once-only use.* A project relating to new oil-extracting techniques might be put on ice for a while because oil prices are too low. Your report on those techniques might resurface a year later, but will not necessarily be seen by the person who commissioned the report originally. The report should be usable independent of the original context – for example, because you have defined the problem fully and clearly in your introduction.

- *Be careful about omitting things that you regard as obvious.* Even if you are confident that the person who commissioned the report will be the reader of your report (and perhaps even the only reader), you should be careful not to omit seemingly obvious details (such as the problem that gave rise to the research and the preconditions that had to be kept in mind). Since giving you the assignment, that person may have dealt with a multitude of other matters. You cannot expect that person to have instant recall of all the details of the assignment one or two months later. Moreover, sometimes you will have to do some background research before the assignment can be formulated clearly. You will have to notify the person who commissioned the report of the exact formulation.

Even if the person who commissioned the report still remembers exactly how things were, your report will be all the more authoritative if you show that you have an overview of the whole problem.

2.2.3 Writing for readers with little time

Most people find that they have little time or inclination to read voluminous texts. This is especially true of managers, who have to digest large amounts of oral and written information daily. With everything they read they will ask themselves:

- What is this?
- What should I do with it?
- Who should I involve in this?

If the text does not answer their own questions quickly, readers become irritated or will not digest the information properly. The following introduction will mainly raise questions in the mind of a decision maker:

AN INTRODUCTION THAT A DECISION-MAKER WILL NOT FIND USEFUL

Problem?	The new installation for recycling of waste oil that was put into operation last May has been shown to only remove particles to 0.2 mm in the three-stage filter for the batch tank.
Action needed?	This report describes the results of a study into increasing the amount of catchment. As well, the possibility of re-distillation in two stages and the re-refining process of KTI will be looked at. During that process, de-gassing and vacuum distillation are used.
Why was the research done?	

The way in which this introduction sketches a technical problem is suitable for a specialist reader who is well-versed in the recycling process. For decision-makers, the text is less easily accessible. What is more serious is that it is completely unclear to the readers why they should read the text. Because the text does not address this, they will not be able to assess the value of the information or put it into perspective. There are, after all, several possibilities:

- We are dealing with a *quality problem* because the final product does not satisfy the desired specifications. This means that the quality control and sales departments should at the very least be involved in the matter.
- There is potentially a *conflict* with the environmental protection authority because the discharged liquid waste (polluted with oil and dirt) does not comply with the legal requirements.
- There is a *cost problem* because a fourth filter will be necessary.

An accompanying letter or an oral explanation of the report may, of course, address these issues. But by the time the various readers get down to actually reading the report, the letter may have been lost or the explanation forgotten. The following introduction would therefore be better for decision-makers.

AN INTRODUCTION THAT A DECISION-MAKER WILL FIND USEFUL

Acute problem	The new installation for recycling waste oil that was put into operation in May has been found to insufficiently remove pollution from the waste oil. As a result, the end product does not comply with the standards for high-grade heating oil and only fetches 60% of the normal price.
Recommended action	This report provides recommendations for a few adaptations to the production process that will bring the quality to the required level within two weeks.
Long term	The literature was also researched with a view to the future (within a year or two, say) possibility of adopting a totally different process, namely re-distillation in two stages or the re-refining process patented by KTI (Kinetics Technology International).

You will rarely find that readers peruse a report of a hundred pages carefully from the first to the last page. But it is still sometimes necessary to write reports like that. A well-set-up report has parts that are important to each category of readers. Appendix 7 might be looked at intensively by the head of the marketing department, who is not at all interested in the rest of your report. It is of the utmost importance that the various categories of reader can select the information that is relevant to them. A conveniently arranged table of contents, informative chapter and section headings and a summary that can be read independently will contribute to this.

2.3 An absence of internal instructions

New employees who have been asked to write a report sometimes ask their department for instructions on how to do so. Many companies have directions for the *formatting* of reports, laid down in the house style. Some companies have directions for the *content* of reports, such as what should go in each section of a report. These directions are often all too vague and offer little to go on. Often there will be no guidelines at all.

Each reader will, of course, have his or her own ideas about what a report should contain, but they rarely get around to formulating these requirements explicitly. The various different readers within an organisation may even have different norms. Readers are not always by definition right. They might have unreasonable demands. Members of a communication consultancy firm discovered that when they were asked for advice by a company whose managers complained regularly about the quality of the reports they received from their employees. It became obvious that the managers expected information in the reports that was superfluous considering the aim of the text. They were expecting to see all kinds of marketing details, which they regarded as extremely interesting because they themselves had a marketing background. However, they did not need these details to make their decisions. Instead of a writing course for the employees, something else was needed here: either explicit instructions on the part of the readers about what they expected in a report or the dropping of obviously unreasonable demands.

The moral of the story is that you will have to develop your *own* ideas about what constitutes an effective text. While it is not advisable to deviate radically from existing traditions in the department, you can count on it that good communication will be recognised as such. And, of course, you can avoid many problems by consulting with the person who commissioned the report. For example, you could provide him or her with a preliminary table of contents.

2.4 Indispensible writing skills

What is required to cope with the problems described in the previous sections?

- *A systematic approach.* If you want to maintain your grasp on what you are doing you will need to adopt a systematic approach. The main thing is to pay attention to what is needed at that particular moment in time. If you try to keep all the important factors (prior knowledge of the reader, structure, clarity, correctness, etc.) in mind *at the same time* you will get writer's block. If you try to write coherent sentences *too soon* (that is to say, when you are still struggling with the contents) you will waste too much time. If you structure your report *too late* you will usually fail to create a clear outline.
- *Attention to the reader.* A capable writer will regularly ask himself who his readers are and what they need, bearing in mind the use they will make of the text within the organisation. The writer will be able to tune in to the various readers as they ask themselves “what do I have to do with this?” Because the reader's demands are not always clear, it may be useful to contact the person who commissioned the report or some of the other readers once or twice during the course of the writing process.
- *Knowledge of writing techniques.* A writer who is aware of what aspects make for clarity of structure and text legibility will be able to produce an accessible text relatively quickly.
- *Setting priorities.* Writing is almost always more time consuming than is thought at first. Compared to educational settings, deadlines are usually tighter. Being too late may make a report useless by that fact alone. Points of special interest have to be chosen carefully. Instead of skimping on your conclusions it can sometimes be better to leave a chapter in a summary state.