

Part I

At some point during your academic or professional career, you may be required to write a report. Reports serve several functions. They may be used to communicate information within an organization upwards to senior management, downwards to staff, or externally to government regulators. They can also serve a persuasive role to get management motivated to take a desired action, support a project, or approve an investment decision. This handout will provide you with an outlined structure for writing reports. After reading this handout you should be able to

- Identify the purpose of a report and the needs of your audience
- Distinguish between informational and analytical reports
- Develop an effective report structure
- Decide on what language and level of detail is appropriate for your target audience
- Apply an appropriate degree of formality to your report
- Determine if the direct or indirect method is appropriate for your target audience
- Create headings, transitions, and graphics to enhance your report's readability

Preparing and Planning: the Audience and the Purpose

The first thing you must do when writing a report is determine why and for whom you are writing. You may be trying to relay requested information to your boss, or you may make an unsolicited proposal to a financial officer for an investment that will reduce cost. You may be asked to investigate an on-the-job accident, or you may have to explain why a project has fallen behind schedule. The purpose and audience of your report will determine the use of language, the degree of formality, the method of delivery, the structure, and the type of report.

For now, let's focus on the different types of reports. The most common types include

Periodic reports – communicate the activities of an ongoing operation at equal and regular intervals. For example, someone might write a quarterly sales report at a retail store.

Trip and conference reports – communicate experiences, details, and knowledge gained from attending activities outside of an organization. For example, an employee that spends a weekend attending a training seminar may be asked to communicate the experience to peers in an effort to share knowledge.

Progress reports - update management or a supervisor on the progress of a project or a process. Examples include reports that communicate the development of a building site or steps that are being taken to adhere to regulation.

Investigative reports – seek to find answers to predetermined questions. A sample report found in a separate handout, for example, answers the question “what is the relationship between the TSX Composite Index and the energy sector?”

How To Set Out A Business Report

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Table of Contents How To Set Out A Business Report

1. Understanding the eBook How To Set Out A Business Report
 - The Rise of Digital Reading How To Set Out A Business Report
 - Advantages of eBooks Over Traditional Books
2. Identifying How To Set Out A Business Report
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an How To Set Out A Business Report
 - User-Friendly Interface
4. Exploring eBook Recommendations from How To Set Out A Business Report
 - Personalized Recommendations
 - How To Set Out A Business Report User Reviews and Ratings
 - How To Set Out A Business Report and Bestseller Lists

5. Accessing How To Set Out A Business Report Free and Paid eBooks
 - How To Set Out A Business Report Public Domain eBooks
 - How To Set Out A Business Report eBook Subscription Services
 - How To Set Out A Business Report Budget-Friendly Options
6. Navigating How To Set Out A Business Report eBook Formats
 - ePub, PDF, MOBI, and More
 - How To Set Out A Business Report Compatibility with Devices
 - How To Set Out A Business Report Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of How To Set Out A Business Report
 - Highlighting and Note-Taking How To Set Out A Business Report
 - Interactive Elements How To Set Out A Business Report
8. Staying Engaged with How To Set Out A Business Report
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers How To Set Out A Business Report
9. Balancing eBooks and Physical Books How To Set Out A Business Report
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection How To Set Out A Business Report
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine How To Set Out A Business Report
 - Setting Reading Goals How To Set Out A Business Report
 - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of How To Set Out A Business Report
 - Fact-Checking eBook Content of How To Set Out A Business Report
 - Distinguishing Credible Sources
13. Promoting Lifelong Learning

- Utilizing eBooks for Skill Development
- Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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