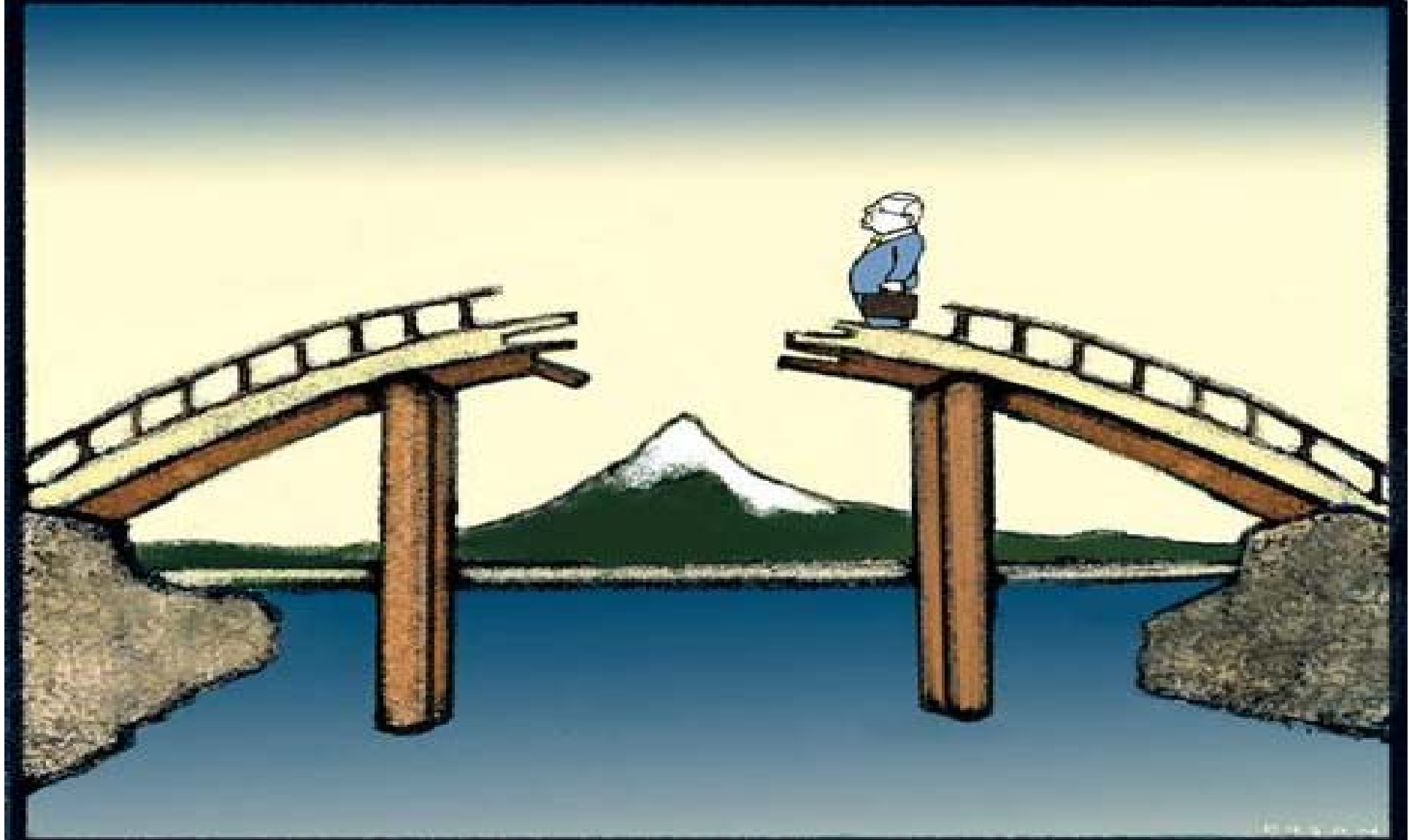# Report Writing
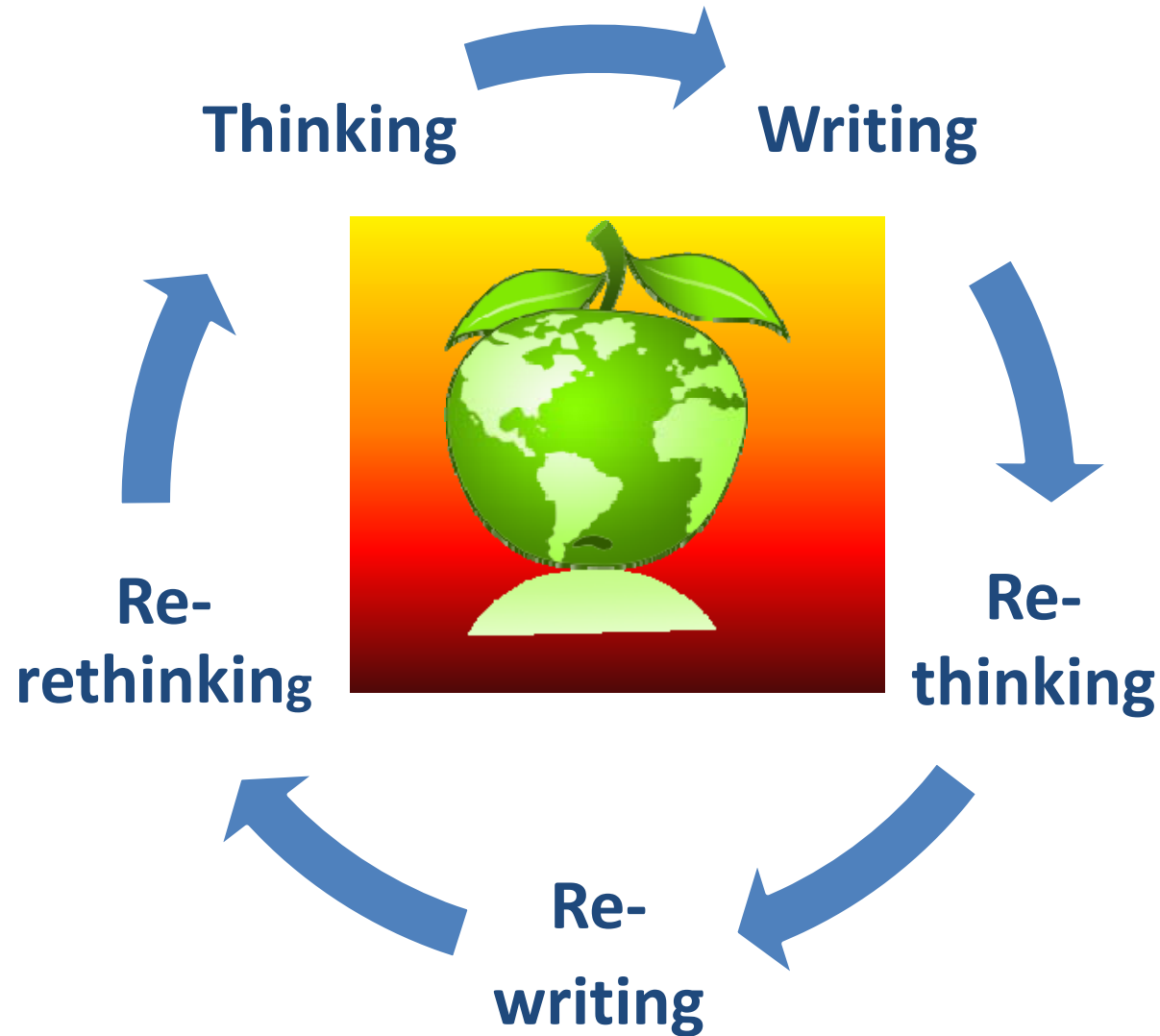## Learner Development Unit
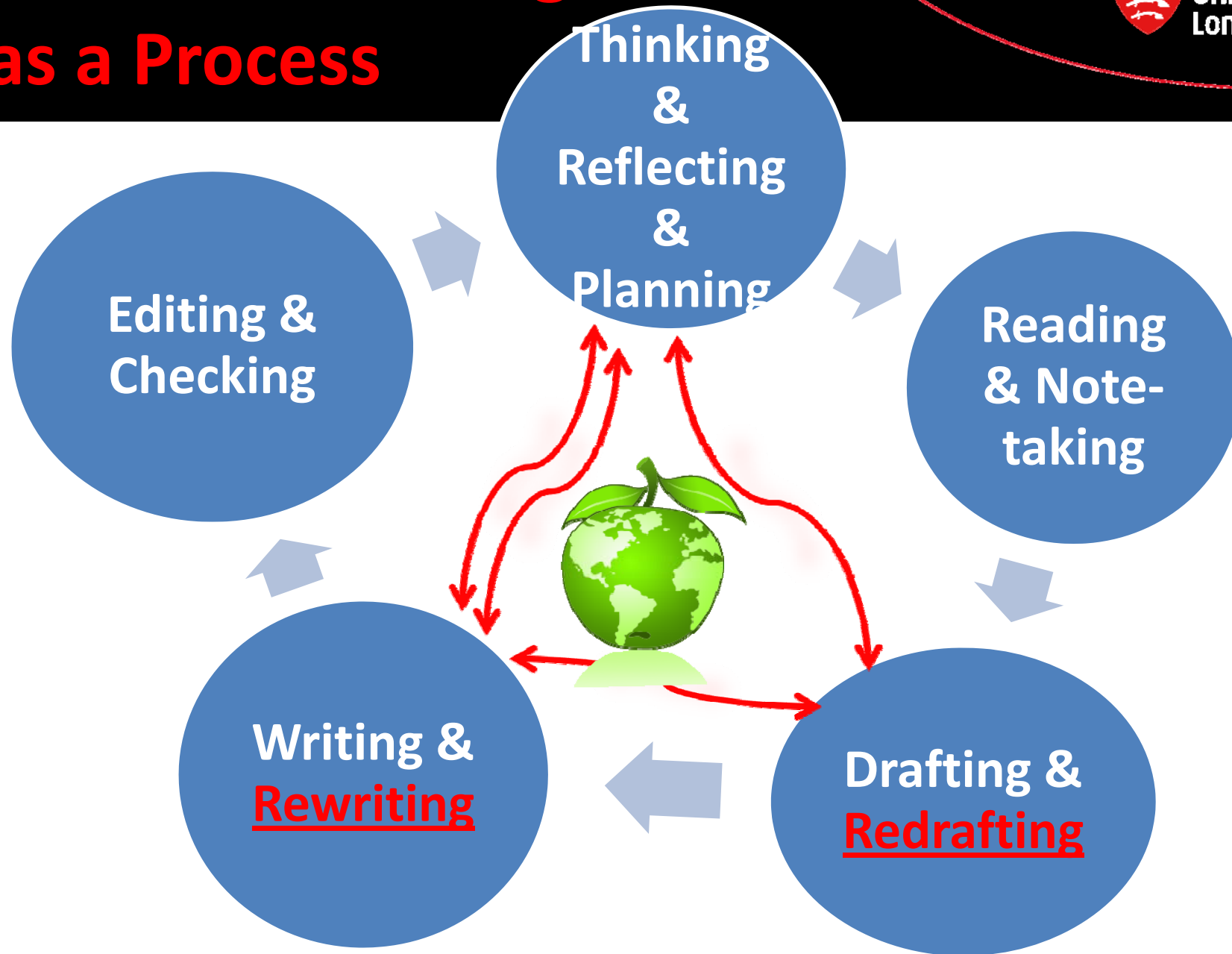
Issues & Aims

1. Report writing:
   i. *What is a report?*
   ii. *Typical structure of a general report*
   iii. *Example structure of a report*
   iv. *Table of Contents*
   v. *Introductions*
   vi. *Executive summaries*
   vii. *Recommendations*

   viii. *Limitations*
   ix. *Reflections*
   x. *Using sources*
   xi. *Criteria for Success*

2. AOB

Academic Writing as a Process

Thinking & Reflecting & Planning

Editing & Checking

Reading & Note-taking

Writing & Rewriting

Drafting & Redrafting

Middlesex University London

1.i) What is a Report?

- A report is not just a discussion of different ideas or theories

- A report is a formal written document written for a specific audience/s which aims to:
  - **inform** clearly and accurately about something that has happened
  - **inform** clearly and accurately about something that needs to be solved
  - give clear and accurate **recommendations**
  - provide clear and accurate **information** which can then be **acted on** in some way

1.ii) Typical Structure of a General Report

1. Title page
2. Table of contents
3. [List of figures]
4. Executive summary
5. Introduction
6. Methodology
7. Analysis of information
8. [Assessment of that information]
9. Conclusions
10. Recommendations
11. [Limitations of the report]
12. List of References
13. Appendices

Title Page

1.1 This should show

 1.1.1 The title

 1.1.2 Your name

 1.1.3 Your personal identifier (NB: this should also be at the top of every sheet.)

 1.1.4 An explanation of what the report is on and who it is for, e.g. 'An External Environment Analysis Report for [tutor's name/name of manager]

 1.1.5 The date

Contents List

2.1 This should show

    2.1.1 The full list of sections within the report (including any appendices, reference or bibliographic lists; etc.)

    2.1.2 The page number on which each section begins

Executive Summary

3.1 A one-page summary which outlines, in no more than three short paragraphs (and preferably just one), what the report says.

3.2 You should write this last.

3.3 It should be in the third person and present tense, e.g. ´The report considers the arguments in   favour of Quality Circles and makes recommendations about their adoption."

Introduction

4.1 This should give a succinct explanation of the aims/context of the report, and should include brief details of any information necessary for the reader to understand it, e.g. company size; structure; main activities; your role/position; etc.

4.2 Introduction should include brief breakdown of report structure

Main Body of the Report

- 5.1 This is where you present your main account of the problem or issue you are writing about.

- 5.1.1 It should be based on **analysis,** not intuition, e.g. avoid   writing "I feel...

- 5.1.2 You must back up what you write with **evidence** and/or **argument**. This means

- 5.1.2.1 You must **substantiate** each assertion you make with evidence, e.g. extracts from the company annual report, a staff survey, recent appraisal interviews, etc.

Main Body of the Report (cont.)

- 5.1.2.2 You must **support** opinions with specific examples/ evidence (e.g. from a consultant's report), or by building a logical argument based on previously cited examples/evidence

- 5.1.3 You should make a clear distinction between **objective** facts and **personal** opinions.

- 5.2 Ideally, this section should be divided into numbered paragraphs that, like this briefing sheet, show which section the paragraph belongs to.

Main Body of the Report (cont.)

- 5.2 Ideally, this section should be divided into numbered paragraphs that, like this briefing sheet, show which section the paragraph belongs to.

- 5.3 Headings for each sub-section, underlined or in bold (as used here) are also a good idea.

- 5.4 Consider presenting material in the form of diagrams, charts, etc., wherever appropriate. These are not only easier to grasp, but reduce the word count.

Conclusions

6.1 This is where you sum up the general conclusion/s you have reached, such as "The very low staff morale is a result of an autocratic management style".

6.2 Don't confuse conclusions (where you draw together the threads of the preceding discussion to make some overall point/s) with recommendations (where you say what should be done about the conclusions you have reached).

6.3 It is sometimes a good idea to present your conclusions in the form of a bullet list, like this:

- Conclusion 1
- Conclusion 2 etc

<u>Recommendations</u>

7.1 This is where you list the actions which your conclusions lead you to believe are necessary, e.g. "The team leader should attend a course in modern approaches to management".

7.2 The recommendations **must** be based on the analysis and conclusions.

7.3 Wherever possible you should include a clear indication of:

- the priorities
- other costs/resource implications
- etc.

List of References

8.1   This is the list of sources referred to directly in your report. If you have mentioned a writer or a book (even a course book) you *must* give full details here of:

- the title
- the writer/s or editor/s
- the publisher
- the date of publication

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Appendices (if any)

9.1   This is where you place any information whose inclusion is not central to the main body of the report but which explains, amplifies or puts in context the arguments and evidence you have presented there.

9.2   Its main purpose is to allow you to include important information which, if it were included in the main body of the report, would interrupt the flow of the argument you are developing there.

9.3   Any material in an appendix does not count towards the word length for the report, nor will it attract any marks.

9.4   Examples of material suitable for an appendix include:

- set of complex figures or statistics
- supporting documents, e.g. extracts from company reports

- **the report should *look* like a single coherent document**
  - consistency of visual style [e.g. font, line-spacing, underlining of headings]
  - justify margins
- **the report should *read* like a single coherent document**
  - Sections should be linked ("bridging")
  - information needs to be unified
  - attitude / approach to information needs to be   unified
  - writing style needs to be consistent
- **Remember your cover page**
- **Remember simple aesthetics**

1.iv) An Example Table of Contents

1.iv) Another Example
Table of Contents

1.v) Introductions

- **<u>Summarises the whole report</u>** in terms of its purpose, data collection methods ,major findings, suggestions / conclusion, limitations, and report structure.

1.v) Introductions

- As globalization is the main trend nowadays, a lot of companies expand aggressively, such as IKEA which is the world largest furniture retailer and manufacturer with its successful expansion into more than 30 countries. This report aims at discussing IKEA as a successful global expanded model to analyze and evaluate its international strategies. We firstly analyze IKEA's internal environment using resource-based view and SWOT, and external environment by the method of PEST in order to evaluate whether the IKEA's strategies reflect the organizational environment and cater to the external trends. Then we refer to the motivation for IKEA by using five forces to expand internationally in order to identify its objectives for its international business and geographic pattern of international expansion strategy. Finally, the market entry strategy is discussed by specifying the case of Japan in order to illustrate how IKEA adopts to a particular country.

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1.vi) Executive Summary

- Brief overview of the whole report

- Must present clear picture of the entire document and instil confidence in reader/s

  - Provides a complete but concise synopsis of the information stated in the report

  - Is the first place in a report where most readers will go

  - Comes at the beginning of a report

  - Should be able to function as a stand-alone document [i.e. makes sense without the report]

1.vi) Example Executive Summary

- This report **provides an analysis and evaluation** of the current and prospective profitability, opportunities and risks of the UK ice cream industry. The methods of analysis used **are** SWOT, PEST and Porters five forces. The report also **outlines** different strategic decisions made by the main companies (Unilever/Walls birds Eye, Nestle/Lyons Maid and Mars) in the industry. It **finds** that the two most important decision made were the decisions by Unilever to supply CTN's with freezer cabinets, and Mars's decision to enter the market with their chocolate bar ice cream. The report **then makes recommendations** for those companies, justified by the analysis undertaken earlier. Unilever need to start direct selling, Mars need to invest in research and development with a view to expanding into the take home market and Nestle need to make more use of their confectionary range. **The report concludes with** an update of the market showing how consumers' tastes have changed to become more health conscious and how the positions of the companies have changed.

- **This report summarises** the three key operational deficits of the ACFJ Corporation's accounts payable systems, **discusses** the impact on the business and root causes, and **suggests** corrective actions for management to consider.

1.vi) Example Executive Summary

- In this study, **we capture** the experiences of women who voluntarily step out of the workforce for a hiatus and **provide proactive recommendations** that these women, as well as employers and universities, can use to facilitate their re-entry into the working world. This study was done under the advisement of the Wharton Center for Leadership and Change and through the support of the Forté Foundation, as well as several professional women's organizations. The research team constructed a survey to delve into the challenges women face when they are ready to return to work after stepping out for a period of time and to collect their advice about how to alleviate, or at least minimize, these challenges. In addition to the survey, we conducted one-on-one interviews with a select group of our survey respondents to explore their experiences in depth. We were interested in how these women manage the process of returning to work after their hiatuses, something we referred to as "stepping back in." We discovered that women seem to face similar difficulties, whether their hiatuses spanned 2 years or 8. While ours is not an academic study, our survey and interviews do cast a light on the experiences these women encounter. We feel our respondents have something important to tell us about the stepping-out process and how the stepping-in process can be improved, and we hope our work enables their voices to be heard.

1.vi) Example Executive Summary

- **The purpose of this project is to discover** what quantitative factors affect decision making as far as long term and short term customers of Fitness First are concerned. The research in this project **is based on** a quantitative and qualitative approach, using non probability sampling and focus groups amongst other research methods. **The project found that** Fitness Firsts main problems coincides with its change of ownership, and that it wouldn't take a particularly great effort to get it back on track. **In some ways, the project is limited in terms of** its in inability to gain an audience with senior managers at Fitness First, forcing speculation as to why certain decisions were taken. **The ideas presented in this project while simple, should go a long way towards solving the problems that Fitness First are currently facing**, while also providing a framework in the form of questionnaires which can easily be repeated at a future date to ensure that the problem has in fact been eradicated.

- **This report discusses** strategic management issues faced by the Sheffield Theatres Trust. **Analysis of the environment reveals that** cinema represents a crucial issue that needs to be dealt with. The time taken to take action on this issue, and the magnitude of the action taken **are criticised with a remedy suggested** of broadening the trusts activities to include other non traditional theatrical activities such as seeking to host other sporting events. The Trusts corporate governance framework **is analysed** with the existence of the scrutiny body seen as a particularly positive factor. **Finally** learning from MCA **is used to encourage** the board to shed traditional ideas and be prepared to embrace new ones such as participating in more CSR related activities.

1.vii) Recommendations

- The current context and likely changes to contextual factors in the future raise certain areas that could be improved. **The first and perhaps most important point** is the fact that the Trust has relied on a traditional customer base as its audience. While this decision has proved aided them thus far, **it is important that this stagnant way of thinking is changed**. As the population gets older the Trust's traditional customers will be physically unable to go to the theatre as often. When this happens it will be important that the Trust has increased its customer base to include younger members of the area or else it will face financial problems. **Marketing should be targeted to** younger audiences and this should be reflected all areas of strategic management such as employing younger members of staff as frontline staff at the Trust, and carrying out relevant market research to identify key interests for the younger population. There is a need for the Trust to pay attention to and be aware of technological advances. Opportunities may arise due to this area that the Trust is able to take advantage of. In order to be placed to do this, part of their strategic

1.vii) Recommendations

- Management has to be geared towards observing events in the external environment. **In light of** the Trust's requirement of raising £15million in funding, the organisation must ensure that it is able to access any appropriate and relevant grants. As the country is suffering from a recession **it will be important that** the theatre takes a pro active approach to its fundraising and that it therefore re-evaluates its stakeholder management. **Extensive research needs to be undertaken as to** what various stakeholder interests are and how best they can be met to the benefit of the Trust. It can also show what groups or already exist that may become stakeholders, such as businesses wishing to connect their brand image to the trust. Stahl and Grigsby (1997) argue that organisations need to be flexible to meet the demands of a constantly changing environment. While deemed controversial by some members of the board, the snooker championship is an important source if income for the Trust. **There is an opportunity to** raise the profile of the organisation by becoming a theatre and indoor sports complex, provided the investment required

- to make any facility changes is appropriate to the financial benefit likely to accrue. **It is this sort of flexibility in pursuing non traditional activities that will be important for** the Trust to change in its strategic management which will allow them to take advantage of changes to contextual factors in the next five years. **Finally**, as Stahl and Grigsby (1997) have argued, Corporate Social Responsibility (CSR) is an area that is becoming increasingly important as a tool for ensuring customer satisfaction as well as raising the profile of organisations. **This is therefore a critical area that the Trust needs to improve as part of their strategic management**. This can be in the form of free workshops or subsidised activities that will serve to both increase awareness of the Trust but also improve relations with various stakeholders who may become future donators or funders.

While every effort was undertaken to ensure that the project was carried out in as unbiased and effective a manner as possible, there were **different limiting factors** that meant that the aim of a thoroughly evaluated sample could never be reached.

It was clear that not every member of the target population (as defined for this project) could be contacted, which meant that probability sampling was not an option, therefore the only possible option was to make use of a different form of sampling methodology. The form of sampling that was chosen was non-probability sampling with particular use of snowball, judgemental and convenience sampling.

In hindsight, there were other errors that were made, that would have limited the outcomes of the project. **These errors were not limited to sampling errors, but also included** some non-sampling errors. **Examples of this were** things that were affected by the fatigue of respondents, social desirability and refusals.

Fatigue of respondents **can be classified as** an "unconscious misinterpretation" on the part of the respondent. **This is because** some respondent's responses were collected after they had undergone their exercise regimes. They were **understandably** fatigued, and **some measure of unintended bias** would have been reflected in their results because of this.

Some data was collated on Fitness First's premises. As such an error relating to social desirability would have occurred. **This is an example of** "deliberate falsification" as the respondents response was influenced because of the presence of other members of Fitness First. **This meant** that there was a desire **on the part of** some respondents to modify their responses in order to be save face with others who had responded in a contrary manner to them.

1.viii) Limitations

When the research team moved their base of operations from inside the Fitness First gym, to the vicinity of it, the problem of refusal was encountered. Many people simply refused to comply,
rather they viewed the questionnaires and interviewers as an invasion of their privacy.

Finally, **it proved impossible to** gain an audience with senior members of Fitness First management. This meant that speculation and assumptions were forced to be made in order to progress with the project. Had senior managers been available to interview, then it would have been easier to find out whether changes that occurred that appeared to be due to a change in owners, could actually be attributed to that fact, or whether there was something else behind the scenes that contributed to this fact.

During the Management Concepts and Applications course (MCA) various management and business concepts were discussed. <u>Though it was not always immediately obvious</u>, **reflection has shown** that these concepts have **clear practical implications**.

An important idea garnered from MCA is that put forward by Mintzberg (1975, pp 49) **which suggests that** it is easy to claim that managers "plan, organize, coordinate and control" without actually understanding the implications. **Mintzberg's argument was that** management was not a "science" as it had previously been seen. **The practical implication for managers** is that prescribing to some forms of scientific analysis **may** end up being counter productive. It is important for managers to attend management training and seek to continuously improve themselves and their organisations, **however the methods chosen to achieve this need to be scrutinised and chosen appropriately**. For the Trust this means managers must be empowered to make decisions while being provided with the relevant training to ensure that they use their empowerment appropriately.

1.ix) Reflection

CSR is rapidly becoming a tool that organisations use to attempt to gain competitive advantage **according to Stahl and Grigsby (1997)**. It emerged as a useful tool as a result of organisation scanning the environments they were operating in, and appreciating that customers were beginning to be more socially aware. The ideas of scanning the environment in order to create competitive advantage and seeking to create value in as many avenues as possible are three separate ideas that can be combined practically in an organisation. **It is important that the Trust do not take a narrow minded approach to their activities but instead see how various components interact and can be blended to form a strategic approach to achieving organisational goals**. The fact that the theatre has traditionally only been used for theatrical and similar productions doesn't mean that allowing the snooker world championships to take place there was the wrong decision. **It is important therefore that** all members of the board see how a more open minded approach to strategy formulation can be beneficial to the Trust.

1.ix) Reflection

Perhaps the most important idea that was put across during MCA was a quote by Peter Drucker (1992, p95) when he asserted that organisations need to be prepared for the "systematic abandonment of whatever is established, customary, familiar, and comfortable." **This idea is crucial as it shows that** an organisation taking a decision to pursue an entirely different strategy **may** not be a bad thing. It encourages continuous innovation **to the extent that** it is **deemed positive** to make such wholesale changes that are paramount to forgetting everything and starting again. **The practical application for the Trust is** not to be scared to make bold decisions that **run contrary to** what has traditionally been comfortable. **This may mean** taking a decision as drastic as pursuing the sports and theatre complex **as discussed earlier**.

1.ix) Reflection

This dissertation process has provided an opportunity to increase my knowledge on both a personal and academic level. **Some of the key areas where this has proved to be the case are highlighted below**:

1) Undertaking a literature review on the subject of appraisals has been **an excellent opportunity to better grasp the concepts involved with** an appraisal. It is clear that it is enough to simply know who is being involved, questions also need answering over what is being appraised which in turn is affected by and will affect why the appraisal is occurring at all.

2) The concept of training for an appraisee was a new one to me. **I would suggest now however that it may be** just as important to provide appraisee training as it is to provide appraiser training. **There is probably little benefit to be had** from an organisational perspective if an appraiser receives useful feedback, but no guidance on how to use that feedback.

3) The transportation of private sector management techniques into the public sector needs to be considered carefully before occurring. **This is not to say that** they can not be useful in the public sector, **rather** there must be an acknowledgement that public sector institutions may have **fundamentally different characteristics** that renders that transportation difficult to achieve successfully.

4) A survey is a useful instrument for gathering opinions and data, **however it needs to be well thought out in order to gather pertinent and useful data**. This process can involve piloting and attempting to analyse the results from the pilot instrument to gain a better idea of what changes may be required.

In order to analyse the effectiveness of the current organisational structure, it is necessary to determine what the current organisational structure is. **According to Johnson et al (2005)** organisations <u>tend to</u> adopt a mix of different structure types, depending on the particular obstacles and challenges that the organisation is faced with. <u>It is important to recognise that this does not mean</u> that organisations do no have general structures that can be identified. <u>The organisational structure that best describes the Trust is</u> the functional structure. It is a structure that groups employees with similar responsibilities and functions together.

1.x) Using Sources

The advantage of this structure according to Johnson et al (2005) is that <u>it allows for</u> greater control on the part of management <u>while also</u> attempting to cultivate an environment <u>through which</u> knowledge is fostered and shared. **This is a view that is rejected by Staniforth (1995) who suggests that** this organisational structure type leads to a loss of knowledge. The reality for the Trust is that knowledge <u>does not appear to be</u> getting lost. <u>This is down to</u> different initiatives that have allowed the Trust to reduce their costs <u>while making sure that</u> knowledge is retained and talent managed appropriately. <u>An example of this is provided by</u> their decision to make some permanent staff redundant and sign them on to seasonal contracts (before eventually restoring their permanent posts later).

1.x) Using Sources

Having identified the structure, there are a range of tests that can be used to determine its effectiveness. **Goold and Campbell (2002) recommend one such test** made up of nine components. **They suggest that** the most important attribute of an organisational structure is that it allows corporate level strategy to work through the people available to achieve organisational goals, while working within whatever constraints are applicable. With this in mind it is clear one of the main problems for the trust is the fact that corporate level strategy is being debated by the very people who need to put out a unified front. This is because some members of the board feel that the Trust should only pursue traditional theatrical activities while others feel that the Trust's decision to branch out into other commercial fields (such as hosting the Snooker Championships) is the correct one. Another problem with the current organisational structure is that it is not one which allows for the organisation to undergo organisational change procedures easily. This is because the structure encourages and allows for the CEO and other members of the trust board to get too involved with day to day business affairs which can allow strategic drift to occur.

Rainey (1997) suggests that while stakeholder analysis is important for most organisations it is even more imperative for non-profit or similar organisation. **He suggests that** it only through recognising and satisfying key stakeholders that a not for profit organisation such as the Trust can be a success. Having demonstrated that satisfaction of stakeholders is of great importance, <u>it is important to determine</u> who the key stakeholders are in order to ascertain how best to satisfy them. To do this, **Johnson et al (2005) suggest** a power/interest matrix that can be useful for mapping stakeholders as sell as determining where an organisation would like its various stakeholders to be. <u>Applying the stakeholder mapping to the trust gives a result as follows</u>:

1.xi) Criteria for Success

- Staying on task
- Addressing the question set
- [Choosing a real organisation]
- Discussing its structure
- Relating the structure to the organisation's goals [what are the organisation's goals?]
- Discussing its culture
- Relating that to the organisations goals & structure
- Discussing any other business functions

- Can the organisation improve in any of these areas? [**KEY part – MUST BE BASED ON THE ANALYSIS YOU HAVE DONE – MUST BE SELF-CONTAINED, GROUNDED, READER NEEDS NO PRIOR KNOWLEDGE**]

1.xi) Criteria for Success

- Avoid "ibid"
- Avoid footnotes
- 1.5 or double-spaced lines
- Justified pages
- Links between sections [bridging]
- Simple aesthetics