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Writing a Report

MOST OF US find ourselves at some time up against the job of writing a report. It may be a business report or the report of a meeting; it may be our report as secretary of an organization, or an analysis of a situation in a factory.

Writing a report need not be the ordeal so many of us fear it to be, and sometimes find it. Like so many other things, it is not particularly difficult if we break it down into small jobs. The purpose of this *Monthly Letter* is to show, step by step, how to write a report. All the suggestions will not be appropriate to every report, but the principles will be generally useful.

We should try to make reports constructive. Instead of threshing old straw, or moving in a pedestrian way through an account of some convention or meeting, it is much more interesting to offer vigorous and thought-provoking interpretations and ideas of our own.

To prepare a good report we need to cultivate dependability, resourcefulness and patience, and do some hard work. Dr. Ewen Cameron says in *What Is Life?* that Mme. Curie combined the intellect of a first-rate scientist with the skill of a first-rate craftsman and the patience of a first-rate charwoman. That is the recipe for holding the interest of listeners and readers; it is the only way in which we can discover or rediscover great truths and convey them to others.

There are, broadly, two kinds of business reports: the information report and the research report.

The information report is to keep an executive up to date with events, developments and projects. The research report is the outcome of your investigation of phenomena. This may be in any branch of human activity, from politics to labour relations, from some crank's idea about taking electricity out of the air to a plan for extending customer use of the power already developed.

Any report upon which action may be based, or which may influence executives in this or that direction, is an important piece of work, and deserves our earnest attention. There is no more engrossing job than that of exploring in search of material for such a report.

Before beginning

Your work starts long before you make a motion toward your pen. You must be properly briefed, and that is a joint responsibility of you and your boss. You must know exactly what is wanted and why it is wanted. Requests for reports should refer to definite and limited problems.

This simple working outline will be of help: 1) comprehend what you are required to report on; 2) ascertain all possible sources of information; 3) decide upon what sources to draw; 4) gather information and explanations; 5) sift the evidence; 6) synthesize the acceptable evidence; 7) abstract what is to the point and discard the rest; 8) throw what is left into report form; 9) summarize your findings.

There are at least four limitations upon research for a report; time, staff, money and data. It is important that the report writer should do his best within these limitations, and his report should note any short-coming because of them. If the report is taken from the files years hence, it should provide evidence of the difficulties the research man encountered, so as to give a realistic starting point for following up or modernizing the report.

Economy of effort will be possible to the report writer if he keeps a clearly defined purpose in mind, and refuses to allow himself to be drawn away by other things, however attractive they may be.

Aesop Glim, known to advertising men through his articles in *Printers' Ink*, advises that the problem being stated, the person preparing a report should sit down with time to make notes of all he knows about the subject. "Don't try to skimp and save words," he

advises. "Go into detail. Enjoy yourself to your heart's content in writing sentence after sentence. Tell everything you know — explain the problem fully."

The objective

In planning the report, serious thought should be given to the need and temperament of the person for whom it is being prepared. Some persons want great detail, others will be content with deductions; some will want tables and graphs, while others will run a mile from a statistic. "What," the report writer should ask himself, "is to be done with what data by whom?"

The kind of report we are considering now — one that gives information on the basis of which an executive may take action — is a sort of diagnosis. It tells what is right and what is wrong, and gives an interpretation which serves as the executive's guide to the remedy, should one be needed.

There are two occasions when recommendations by the report writer are in order: when they are requested, and when the writer believes that because of his knowledge, experience, and other qualities, his voice is worth listening to.

All recommendations are touched with the personality of the writer of the report. The wise man will make a distinction between his conclusions, based upon the facts he has uncovered, and his suggestions, based upon these conclusions. The former are actualities, the latter are tinged with the colour of his opinions.

If recommendations are made, they should be clear and definite. They should tell what to do, who is to do it, where it should be done, at what time, and why this is recommended.

Form of the report

Writing a report will be much easier if you work out a form, or skeleton.

A good plan for the inexperienced report writer is to start with a statement in one sentence, setting forth the objective of the study which is being reported upon. This will focus attention upon the primary purpose. Then follow with main and sub-headings, growing out of the sentence and leading toward the conclusion.

It is surprising how greatly this plan helps to eliminate vagueness, fill in gaps in information and reasoning, and keep the writer on the track of competent thinking.

Although it does not hold true in every case, the success of many reports may be attributed to a well-written introduction or synopsis. If attention of the reader is seized at this point, he is likely to proceed into the body of the report with an expectant mind. Even when one is sure the report will be read, as when the topic is one of particular interest to an executive, it still is good practice to provide a summary telling what the report is about and what point it makes. It should be sharp in its diction, sparing of words, and careful to promise no more than is in the report.

When you come to your preliminary outline, it should be drafted so as to give you a fairly clear idea of the road ahead, enable you to judge what you should stress, and provide you with a test of the adequacy of your research.

It is not necessary, in this short mention of the form of the report, to go into detail about the appendix, the table of contents, the index, and suchlike. These are features which are required only in exhaustive and lengthy reports, and they fall into place quite naturally when their use is indicated.

Chronological reports and research

The person who writes a report which records happenings in the order of their time sequence must bear in mind that events sometimes follow one another in successive points of time without tending toward an end. He needs to look out for cause-and-effect relationship. His report should tell origin, history, and development. It should bring out what is the focal point, the turning point, the key event that marks a change or indicates the need for a change.

Many a chronological report is only a collection of episodes; merely the starting place for research. Nothing much that is useful will flow from our work until we start asking questions and finding answers.

This leads us into consideration of the analytical report, which starts off with the idea that there is a problem to be solved, and marches toward definite conclusions. It is not a mere collection of data; it gathers facts for and against the proposal being studied, and then goes on to assess them by comparison and testing.

The person embarking upon preparation of such a report has need of an open mind. His is a quest for truth, unbiased, unprejudiced and clear-headed. He will not suspend his research until it has reached the point where the returns from the investigation have ceased to be really important. He will modify his way of thinking as he goes along, if necessary, to fit the new thoughts born of his study.

There can be no more illustrious purpose than that of the research man: To find the truth no matter how obscure; to recognize it no matter in what strange form it may present itself; to formulate it honestly; to state it unmistakably; and to reason from it remorselessly and without regard to prejudice.

Business research is of many kinds. It may be

designed to solve a merchandising or production or distribution problem; it may be called upon to find ways of effecting economies; it may be done in response to management's desire to anticipate trade developments within the industry, shifts in the economy of the country, or progress in technology.

Its leading questions are: what is true? what is best? what is necessary? how do we do it? A good test question, to be used when the others have been answered, is: if I do that, then what happens?

The writer of a report can be sure he has done a good job if he is confident that he has analysed more profoundly than others the problem put before him; that he has achieved an original focus of facts toward a desired purpose; that he has supplied, in his report, alternative courses of action, the foreseeable consequences of which he has fully thought out; and that he has provided not only a well-written report but a solid block of knowledge on which to build.

Not much need be said about the various kinds of analytic reports except just to name them. The case study, while incomplete in itself because no conclusions can be drawn from one case, is useful as part of a larger project. It can be enlightening, and because of the narrowness of its field it can be thorough. The genetic study traces the development of its subject, stressing the causal sequence of events. The comparative method involves bringing together significant facts. Its chief impediment seems to lie in the danger of bias attending selection of the facts to be compared, and the perplexity of discriminating wisely.

Much of abiding value may be learned by report writers and research men who study military "appreciations." These follow logical sequence:

I. The object to be attained
II. Factors which affect attainment of the object
III. Courses open to
    A — our own side
    B — the enemy
IV. The plan.

The factors relevant to a military situation do not all apply in industrial or social life, but the thorough analysis of the problem demanded by the military people is suggestive for all who write reports.

Sources of information

Collecting information is the foundation of all good reporting. Thomas Edison gave this advice: "The first thing is to find out everything everybody else knows, and then begin where they left off."

While every problem will have its peculiar requirements, certain sources of data are common to nearly all: observation, experimentation, books, questionnaires, interviews, workshop and accounting records. The successful writer will be resourceful in his research activities, thinking of new approaches and seeking data overlooked hitherto.

Data may be primary or secondary. Just as in law the evidence of an eye-witness is more valuable than that of a person who testifies at second-hand, so in business and other reports the fruits of observation and experimentation rate high marks. He is a wise report writer who applies, whenever possible, observation and experimentation to check the findings of others; he is likely to remain unremarkable for his work if he merely echoes the opinions of others, believes things because others believe them, and uses only books and papers with which he is in complete accord.

Secondary sources depend for their value upon their accuracy, their acuteness of valuation, the validity of their reasoning, and the applicability of their conclusions to the case being studied.

No statement is more reliable than its source. The report writer must spend long hours in gathering facts, arranging them, interpreting them, — and then as much time again in checking the accuracy and worthwhileness of what he has in his hand. It is useless to quote a writer unless he is known to be competent in his field. It is dangerous to give the opinion of a man unless he is recognized as being unbiased, up-to-date and in all respects reliable.

Writing the report

Having gathered the facts and laid them out in order, we must compose our report.

This is a time when a writer wishes to be alone. John Ruskin had circulars which he used to head off visitors, invitations and letters. They read like this: "Mr. J. Ruskin is about to begin a work of great importance and therefore begs that in reference to calls and correspondence you will consider him dead for the next two months."

Literary skill, in whatever field it is exercised, means ability to present a subject as accurately and as vividly as possible. We should at least write our reports as if we were interested in what we are trying to write, and when we do so we have gone a long way toward giving our reports significance.

The report writer needs to analyse, and group, and marshal his facts into order. He must classify and conquer the elements of the chaos around him before he can hope to appeal with any force to the intelligence of other people. In this process of viewing the whole situation and at the same time seeing its components, the writer will detect incongruities to avoid and discern a path to follow.

These are skills which come only, so far as we know, with practice, but there are some hints about the process of writing which apply in all circumstances.

The report must be practical. We have a loose way of

thinking of a realist as one who not only sees things as they are materially, but acquiesces in them: let us rather, as report writers, consider ourselves as being realists in the sense that we understand things as we have found them, not as we would find it convenient to believe them.

The report must be complete. We must have walked all around the matter about which we are reporting, seeing the good and the bad, the perfect and the imperfect, the desirable and the undesirable. We must have provided adequate proof for our favourable and our unfavourable findings. Do not be content with one opinion: it may be the wrong one. As Cicero once pointed out, nothing is so absurd that someone has not called it profound; nothing so profound that someone has not called it absurd.

The report must be concise. It may be as long as a roller towel, or as short as a message on a postcard: length is not the criterion. Conciseness does not consist in using few words, but in covering the subject in the fewest possible words that will express what is in the writer's mind.

Here is the story of Homer's *Odyssey* in 79 words: "A certain man is away from home for a number of years, being closely watched by Poseidon and stripped of all his companions, while his affairs at home are in such shape that his money is being squandered by wooers of his wife, and his son is being plotted against. After being shipwrecked by a storm, he arrives home, makes himself known to some, and attacks the wooers, with the result that he is saved and his enemies destroyed." In giving us this gem of condensation in his *Poetics*, Aristotle remarks: "That is the real story of the *Odyssey*. The rest is episodes."

We recall Prime Minister Winston Churchill's wartime memoranda, demanding that his cabinet ministers confine their reports on the most momentous matters to a single page. "It is," he told the Secretary of State for Foreign Affairs, "sheer laziness not compressing thought into a reasonable space."

The report must be clear. Only the careful organization of facts and interpretation will enable the reader to follow what is to the writer a clear-cut line of reasoning. The art of good prose resides not so much in the swing and balance of the language as in the marshalling of argument, the orderly procession of ideas, the disposition of parts so that each finds its proper place. The writer misses his target if the idea in his mind is not received with understanding. As Alice said after reading *Jabberwocky:* "Somehow it seems to fill my head with ideas — only I don't exactly know what they are."

Use of trite expressions shows that the writer is in a rut. If he has no imagination in his language is it likely, the executive will ask, that he exercised any imagination in his analysis of this problem?

There is no place in good writing for proverbs, saws, and tinkling aphorisms.

Foggy language detracts from the force of writing, and use of words loosely may well vitiate all usefulness that might have been incorporated in a report. We say nothing against trade, occupational or professional jargon so long as the report is solely for people who are on speaking terms with it. That sort of talk is not infrequently the only kind in which a writer can convey the true meaning of his thought to a particular audience. But jargon has no place in reports which may be read by the uninitiated.

The report must be intellectually honest. The facts must be scrupulously weighed and properly evaluated, and the writer must sincerely attempt to present something that has a judicial quality. He will draw a distinct line between what he has found to be factual, what is his opinion, and what he sets up as a hypothesis.

The report must be readable. We cannot afford to assume that our report will be read because the boss is interested in the subject. We should try to add to the clarity of our presentation something that will lift it above the ordinary.

There may be an ivory-tower disposition toward decorum, leading us to think that research requires a depersonalized manner of writing. The truth is that nothing written is useful unless it is attractive enough to be read. We are entitled to be as brilliant and interesting as we can be, so long as we observe the requirements of correctness, relevance and the objective.

And having written:

Having written it, the writer would be well-advised to forget about his report for as long as time permits. If he tries to make corrections and improvements as soon as he has finished the writing, his memory of what he meant to write may be so strong that he will overlook the short-coming of what he actually wrote.

Here are some questions to ask at the time of revision: is my report fair, broad-minded and dignified? Have I used enough imagination in presenting the facts? Have I answered all the pertinent questions likely to arise in the reader's mind? Does my report read as if a human being wrote it?

It is well to read the report aloud: if it is easy to read you may bank upon its being easy to understand. If you hesitate over a word, a phrase or a sentence, take a second look.

The writer who achieves distinction of expression, conciseness, directness — and, if the nature of his work permits it, dramatic quality, beauty of rhythm, and some adventurousness of phrase and idea — has not done something miraculous. He has worked hard and intelligently.