

Writing in Organizations

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Lecture 8

جامعة الجميع الذكية

تسعى لتكون الكيان الأول الذي يتبنى مبدأ المجتمع التعليمي
التعاوني ويقدم العلم مقابل العمل لتنمية وبناء المجتمعات.

MGM 202

Writing Effective Short
Reports



جامعة الجميع الذكية
EVERYONE'S SMART UNIVERSITY

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Lecture Outline

Lecture 1: Getting Started: Writing and Your Career.

Lecture 2: The Writing Process and Collaboration at Work.

Lecture 3: Writing Routine Business Correspondence.

Lecture 4: Writing Letters: Some Basics for Communicating with Audiences Worldwide.

Lecture 5: How to Get a Job: Searches, Dossiers, Portfolios, Résumés, Letters, and Interviews.

Lecture 6: Designing Successful Documents, Visuals, and Websites.

Lecture 7: Writing Instructions and Procedures.

Lecture 8: Writing Effective Short Reports.

Lecture 9: Writing Proposals.

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- 1- Why Short Reports Are Important**
- 2- Types of Short Reports**
- 3- Seven Guidelines for Writing Short Reports**
- 4- Periodic Reports**
- 5- Sales Reports**
- 6- Progress Reports**
- 7- Travel/Trip Reports**
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- 9- Protecting Yourself Legally**

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Writing Effective Short Reports

1- Why Short Reports Are Important:

A short report can be defined as an organized presentation of relevant data on any topic—money, travel, time, technology, personnel, service equipment, weather, the environment—that a company or agency tracks in its day-to-day operations. Short reports are practical and to the point. They show that work is being done, and they also show your boss that you are alert, professional, and reliable. Short reports are written to co-workers, employers, vendors, and clients. When they are intended for individuals within your organization, short reports are most often sent as memos or as e-mails. But, for clients, usually you will send your reports out as letters.

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Businesses cannot function without short written reports. Reports tell whether

- work is being completed
- schedules are being met
- costs have been contained
- sales projections are being met
- unexpected problems have been solved

You may write an occasional report in response to a specific question, or you may be required to write a **daily** or **weekly** report about **routine** activities.

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2- Types of Short Reports:

To give you a sense of some of the topics you may be required to write about, **here is a list of various types of short reports common in the business world.**

appraisal report
audit report
budget report
compliance report
construction report
design report
evaluation report
experiment report
feasibility report

incident report
inventory report
investigative report
laboratory report
manager's report
medicine/treatment
error report
operations report
periodic report

production report
progress/activity report
recommendation report
research report
sales report
status report
survey report
test report
travel report

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This chapter concentrates on five of the most common types of reports you are likely to encounter in your professional work.

1. periodic reports
2. sales reports
3. progress reports
4. travel reports
5. incident reports

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Although there are many kinds of short reports, they all are written for readers who need factual information so that they can get a job accomplished. Never think of the reports you write as a series of casual notes jotted down for your convenience.

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Writing Effective Short Reports

3- Seven Guidelines for Writing Short Reports:

the following seven guidelines will help you write any short report successfully.

1. Anticipate How an Audience Will Use Your Report

Knowing who will read your report and why is crucial to your success as a writer. A co-worker or someone else in your field may be familiar with technical information. But managers, who will constitute the largest audience for your report, may not always understand or be interested in such technical information. Instead they will want bottom-line details about costs and schedules, for example.

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2. Do the Necessary Research

An effective short report needs the same careful research that goes into other on the job writing. Your research may be as simple as instant messaging, e-mailing, or leaving a voice mail for a colleague or checking a piece of equipment. Or you may have to test or inspect a product or service or assess the relative merits of a group of competing products or services.

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3. Be Objective and Ethical

Your readers will expect you to report the facts objectively and impartially—locations, costs, sales, weather conditions, eyewitness accounts, observations, statistics, test measurements, and descriptions. Your reports should be truthful, accurate, and complete.

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Here are some guidelines to follow:

- Avoid guesswork.
- Do not substitute impressions or unsupported personal opinions for careful research.
- Using biased, skewed, or incomplete data is unethical.
- Make sure your report is relevant, accurate, and reliable.

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4. Organize Carefully

Organizing a short report effectively means that you include the right amount of information in the most appropriate places for your audience. Make your report easy to read and to follow. Many times a simple chronological or sequential organization will be acceptable for your readers. Your headings will show readers how you organized your report. Readers will expect your report to contain information on such topics as the purpose, findings, conclusions, and, in many reports, recommendations.

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5. Use Reader-Centered Headings, Bullets, Numbering, and Visuals

Help readers locate and focus on key information in your report quickly by using headings and subheadings that clearly demonstrate how you have organized and subdivided your report. See, for example, the headings in Figures 8.2. You can also use bulleted and numbered lists where relevant, as in Figure 8.2, to break up chunks of information into easy-to-grasp pieces.

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Writing Effective Short Reports

Figure 8.2 A well-prepared report, revised from Figure 8.1.

Precise subject line

Begins with concise overview of report

Organizes crimes into categories

Supplies easy-to-follow visual

Table is highlighted, making it easier to read

Uses clear headings to show organization of report

To Serve and To Protect



Springdale Police Department
Emergency 555-1000 Administration 555-1001 Traffic 555-1002

TO: Captain Alice Martin
FROM: Sergeants Daniel Huxley, Jennifer Chavez, and Ivor Paz
SUBJECT: Crime rate for the second quarter of 2011
DATE: July 12, 2011

From April 1 to June 30, 852 crimes were committed in Springdale, representing a 5 percent increase over the 815 crimes recorded during the previous quarter.

TYPES OF CRIME
The following report, based on the table below, discusses the specific types of crimes, organized into four categories: **robberies and theft**, **felonies**, **traffic**, and **misdemeanors**.

Table 1. Comparison of the 1st and 2nd Quarter Crime Rates in Springdale

CATEGORY	1st Quarter	2nd Quarter
ROBBERIES and THEFT		
Commercial	63	75
Domestic	36	43
Auto	33	40
FELONIES		
Homicides	16	13
Assault and battery	77	92
Carrying a concealed weapon	10	11
Poss. of a controlled substance	55	47
Rape	9	8
TRAFFIC		
Speeding	165	158
Failure to observe signals	102	98
DUI	78	45
MISDEMEANORS		
Disturbing the peace	48	53
Vagrancy	40	48
Public drunkenness	19	40
Leash law violations	21	32
Dumping trash	35	37
Other	8	12

Robberies and Theft
The greatest increase in crime was in robberies, 20 percent more than last quarter. Downtown merchants reported 75 burglaries, exceeding \$985,000. The biggest theft occurred on May 21 at Weisenfarth's Jewelers when three armed robbers stole more than \$217,000 in merchandise. (Suspects were

(Continued) Figure 8.2

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apprehended two days later.) Home burglaries accounted for 43 crimes, though the thefts were not confined to any one residential area. We also had 40 car thefts reported and investigated.

Felonies

Homicides decreased slightly from last quarter—from 16 to 13. Charges for battery, however, increased—15 more than we had last quarter. Arrests for carrying a concealed weapon were nearly identical this quarter to last quarter's total. But the 47 arrests for possession of a controlled substance were appreciably down from the first quarter. Arrests for rape for this quarter also were less than last quarter's. Three of those rapes happened within one week (May 6–12) and have been attributed to the same suspect, now in custody.

Traffic

Traffic violations for this period were lower than last quarter's figures, yet this quarter's citations for moving violations (335) represent a 5 percent increase over last quarter's (322). Most of the citations were issued for speeding (158) or for failing to observe signals (98). Officers issued 45 citations to motorists for DUIs, an impressive decrease over the 78 DUIs issued last quarter. The new state penalty of withholding a driver's license for six months of anyone convicted of driving while under the influence appears to be an effective deterrent.

Misdemeanors

The largest number of arrests in this category were for disturbing the peace—53. Compared to last quarter, this is an increase of 10 percent. There were 88 charges for vagrancy and public drunkenness, an increase from the 59 charges made last quarter. We issued 32 citations for violations of leash laws, which represents a sizable increase over last quarter's 21 citations. Thirty-seven citations were issued for dumping trash at the Mason Reservoir.

CONCLUSION

Overall, while the crime rate has decreased in traffic (especially DUIs) and possession of controlled substances this quarter, we have seen a marked increase in arrests for robberies and battery.

RECOMMENDATIONS

To help deter robberies in the downtown area, we recommend the following:

- increasing surveillance units to 15 rather than the 10 now in the area
- offering businesses our workshop on safety and security precautions, as we did during the first quarter

Historically, battery arrests have risen during the second quarter. Our recommendations to counter this trend include:

- continuing to work closely with Neighborhood Watch Groups
- providing more foot and bicycle patrols in the neighborhoods with the highest incidence of battery complaints

Provides essential background and statistical information and comparative analyses

Easy-to-read sentences

Draws logical conclusion

Includes only data reader needs

Summarizes findings of report

Offers specific actions/changes department should make based on conclusion of report in bulleted lists

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6. Write Clearly and Concisely

Writing clearly and concisely is essential in all business reports. Ask your boss or co-workers who have done short reports for your company about appropriate style. Also look at previous, similar reports to get a sense of your company or house style.

Here are a few guidelines to help you write clearly and concisely.

- Use an informative title/subject line that gets to the point right away.

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- Write in plain English.
- For global readers, make sure you use international English.
- Adopt a professional yet personal tone.
- Keep your report as concise as possible while still giving readers the essential information they need.
- Begin with the most important information.
- Supply sufficient and relevant documentation.

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7. Choose the Most Appropriate Format

Depending on your audience, you can send your short report as an e-mail, a memo, or a letter. For routine reports to your boss or others inside your company, you will likely use a memo format. Note that with a memo format your readers will not expect you to include an inside address or formal salutation and complimentary close.

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Writing Effective Short Reports

4- Periodic Reports:

Periodic reports, as their name signifies, provide readers with information at regularly scheduled intervals—daily, weekly, bimonthly (twice a month), monthly, quarterly. They help a company or agency keep track of the quantity and quality of the services it provides and the amount and types of work done by employees. Information in periodic reports helps managers make schedules; order materials; hire, train, or assign personnel; budget funds; and, generally speaking, determine corporate needs.

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Writing Effective Short Reports

5- Sales Reports:

Sales reports provide businesses with a necessary and ongoing record of accounts, online and mail purchases, losses, and profits over a specified period of time. They help businesses assess past performance and plan for the future. In doing that, they fulfill two functions: financial and managerial. As a financial record, sales reports list costs per unit, discounts or special reductions, and subtotals and totals. Like a spreadsheet, sales reports show gains and losses. They may also provide statistics for comparing two quarters' sales.

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6- Progress Reports:

A progress report informs readers about the status of an ongoing project. It lets them know how much and what type of work has been done by a particular date, by whom, how well, and how close the entire job is to being completed. **A progress report emphasizes whether you are**

- specifying what work has been done
- keeping your schedule

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- staying within your budget
- using the proper technology/equipment
- making the right assignments
- identifying an unexpected problem
- providing adjustments in schedules, personnel, and so on
- indicating what work remains to be done
- completing the job efficiently, correctly, and according to codes

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- Audience for Progress Reports

A progress report is intended for people who generally are not working alongside you but who need a record of your activities to coordinate them with other individuals' efforts and to learn about problems or changes in plans. **For example**, because supervisors may not be in the field or branch office or at a construction site, they will rely on your progress report for crucial information. Customers, such as a contractor's clients, expect reports on how carefully their money is being spent. That way they can adjust schedules or alter specifications if there is a risk of going over budget.

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- Parts of A Progress Report

Progress reports should contain information on (1) the work you have done, (2) the work you are currently doing, and (3) the work you will do.

How to Begin a Progress Report

In a brief introduction, cover the following:

- indicate why you are writing the report
- provide any necessary project titles or codes and specific dates
- help readers recall the job you are doing for them

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- How to Write the Body of a Progress Report

The body of the report should provide significant details about costs, materials, personnel, and times for the major stages of the project.

- Emphasize completed tasks, not false starts.
- Omit routine or well-known details (“I had to use the library when I wanted to read the back issues of Safety News that were not archived on the Internet”).
- Describe in the body of your report any snags you encountered that may affect the work in progress.

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- How to End a Progress Report

The conclusion should give a timetable for the completion of duties or submission of the next progress report. Give the date by which you expect work to be completed. Be realistic; do not promise to have a job done in less time than you know it will take. Readers will not expect miracles, only informed estimates. Even so, any conclusion must be tentative.

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7- Travel/Trip Reports:

Reporting on the trips you take is an important professional responsibility in the world of work. In documenting what you did and saw, travel reports keep readers informed about your efforts and how they affect ongoing or future business. Moreover, such reports help you to better understand your job and to develop your networking skills. Travel reports also should be written after you attend a conference, convention, or sales meeting or call on customers.

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- Common Types of Travel/Trip Reports

Travel reports can cover a wide range of activities and are called by different names to characterize those activities. **Most likely, you will encounter the following three types of travel reports.**

1. Site inspection reports.
2. Field trip reports.
3. Home health or social work visits.

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- How to Gather Information for a Trip/Travel Report

Regardless of the kind of trip report you have to write, your assignment will be easier and your report better organized if you follow these **suggestions**.

1. Before you leave on the field trip, site inspection.
2. When you return from your trip.

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8- Incident Reports:

The short reports discussed thus far in this chapter have dealt with routine work. They have described events that were anticipated, planned, or supervised. But every business or agency runs into unexpected trouble that delays routine work. More often than not, these circumstances need to be documented in an incident report. Employers and, on some occasions, government inspectors, law enforcement, insurance agents, and attorneys must be informed about those events that interfere with or threaten normal, safe operations.

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- When to Submit an Incident Report

An incident report is required when there is, **for example**

- an accident—fire, automobile, physical injury
- a law enforcement offense
- an environmental danger, including a computer virus
- a machine breakdown
- a delivery delay
- a cost overrun
- a production slowdown

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- Parts of an Incident Report

Include the following information in your incident report. Because it can contain legally sensitive information, for which the reader needs a hard copy and paper trail, an incident report should not be sent as an e-mail. Note how Figure 8.6 includes detailed and accurate information on these parts.

An incident report in memo format. Figure 8.6



THE GREAT HARVESTER RAILROAD
Des Moines, IA 50306-4005
<http://www.ghrr.com>

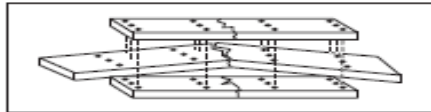
TO: Angela O'Brien, District Manager
FROM: James Hwang, Safety Inspector
DATE: Nick Roane, Engineer *Nick Roane*
SUBJECT: August 6, 2011
Derailment of Train 26 on August 5, 2011

TYPE OF INCIDENT
Two grain cars went off the track while I was driving Engine 457 of Train 26 on August 5, 2011. There were no injuries to the crew.

DESCRIPTION OF INCIDENT
At 7:20 a.m. on August 5, 2011, I was traveling north at a speed of 52 miles an hour on the single main-line track four miles east of Ridgeville, Illinois. Weather conditions and visibility were excellent. Suddenly, the last two grain cars, 3022 and 3053, jumped the track. The train automatically went into emergency braking and stopped immediately. But it did not stop before both grain cars turned at a 45° angle. After checking these cars, I found that half the contents of their loads had spilled. The train was not carrying any hazardous chemical shipments.

I notified Supervisor Bill Purvis at 7:40 a.m., and within 45 minutes he and a section crew arrived at the scene with rerailing equipment. The section crew removed the two grain cars from the track, put in new ties, and made the main-line track passable by 9:25 a.m. At 9:45 a.m. a vacuum car arrived with Engine 372 from Hazlehurst, Illinois, and its crew proceeded with the cleanup operation. By 10:25 a.m. all the spilled grain was loaded onto the cars brought by the Hazlehurst train. Bill Purvis notified Barnwell Granary that their shipment would be at least four hours late.

CAUSES OF INCIDENT
Supervisor Purvis and I checked the stretch of train track where the cars derailed and found it to be heavily worn. We believe that a fisher joint slipped when the grain cars hit it, and the track broke. You can see the location of the cracked fisher joint in the graphic below.



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1. Type of incident.
2. Identification details.
3. Time and location of the incident.
4. Description of what happened.
5. What was done after the incident.
6. What caused the incident.
7. Recommendations.

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9- Protecting Yourself Legally:

An incident report can be used as legal evidence; it will then become part of a permanent legal record that can be used by law enforcement and attorneys in court to establish negligence and liability on your and your company's part, including determining a worker's compensation rights. It can also be used by an employer to assess employee responsibility. An incident report frequently concerns the two topics over which powerful legal battles are waged—health and property.

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You have to be very careful about collecting and recording details. Make sure your report is not biased, sketchy, or incomplete. To avoid these errors, you may have to interview employees or bystanders; travel to the incident site; check compliance manuals, code books, or other guides; consult safety experts; or research records and archives.

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To ensure that what you write is legally proper, follow these guidelines.

1. Submit your report promptly and sign or initial it.
2. Be accurate, objective, and complete.
3. Give facts, not opinions.
4. Do not exceed your professional responsibilities.

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Writing Effective Short Reports

References:

Successful Writing at Work, Concise
Third Edition,

By: Philip C. Kolin

University of Southern Mississippi

Chapter 8

