What is a report, exactly?
Reports, simply put, are documents used to convey information to others. Though reports vary greatly in type (e.g., progress reports, feasibility reports, sales reports, etc.) and length (e.g., consider a progress report in memo format vs. a lengthier, more detailed annual company report), and in supporting research (e.g., an academic report might rely primarily on academic resources such as journal articles, whereas a company report might rely most heavily on internal data and findings), they tend to share three fundamental features:

- Reports rely on “verifiable evidence” (e.g., statistics, accounts, research findings)
- Reports often “interpret” this evidence in order to understand its significance and “implications”
- Reports often (but not always) offer recommendations to the reader, based on the ways the evidence has been presented and interpreted (Rodman, 2005, p. 362)

Who uses reports?
Members of companies, government officials, students, instructors – just about anyone who is required to present or access information on a particular topic/issue, in order to gain knowledge, assemble and record data, evaluate findings, and/or explore, suggest, or promote alternatives.

Why do we sometimes, in certain settings, choose to write or request reports over other types of documents?
We can say that all writing emerges from and is therefore shaped by situations that require a specific type of response. We might speculate, then, that reports have emerged from situations requiring communication that is distinctively organized, efficiently conveyed, objectively presented, and when required, meaningfully interpreted. This information becomes a foundation for other types of writing that may follow or draw upon it, and a record of what is known, what has occurred or what may occur in the future. Beyond conveying information, this type of writing also becomes a way to participate in a particular community: in the context of a company, for instance, your report might establish your reputation, allow you to communicate with key figures in the organization, and/or instigate change; in a classroom context, your report allows you to fulfill course requirements, demonstrate knowledge of core concepts to an instructor, and showcase your efforts.

Reports, as Rodman (2005) notes, almost always stem from requests for information – from a boss, from a client, or from an instructor – rather than from writers themselves. This means writers must always be highly sensitive to the audience, the purpose and the situation from which the request emerges (and to whom/where the report ultimately goes) if they are to successfully communicate their findings and meet the expectations/needs of their readership.

How do readers use reports?
Unlike an academic essay, for instance, where a reader might begin with the introduction to discover the writer’s topic and main claims before reading the body, reports may not always be read cover to cover: readers might begin with the executive summary, for instance, and then move to sections in the report most pertinent to their interests/needs. Each section of a report, therefore, functions both as an independent unit and a part of a larger, comprehensive whole.

What should a report include?
Now that we’ve considered the background, function(s) and purpose(s) of a report, we need to consider the various sections one can contain, in the order in which such sections typically appear.
This will help you determine how best to prepare and present your findings. (Note: sections and formats of reports can vary, so always be open to alternative ways of organizing your document/presenting your information).

1) Letter (or Memo) of Transmittal (sometimes also called a “Cover Letter”)
A typically brief and more personalized overview of the report in letter or memo form that acknowledges the reader and that individual’s request/need for the information the report includes (ideally, for each different reader the report goes to, a personalized letter or memo of transmittal is included). This letter or memo identifies the report’s topic, offers a brief description of the report, and details its main findings. This letter/memo often concludes with personal acknowledgement of the reader – perhaps through an offer of extra information (“I’m happy to provide any additional data you may require…”) or, if and when appropriate, recognition of how the information might benefit the reader (“I trust the findings of this report will help you better understand this corporation’s goals for expansion…”)

2) Title or Cover page
The title or cover page provides identifying information of the assignment/task, author, and recipient, and gives initial insight into the report through the appropriately descriptive title provided. A reader should ideally have a solid impression of what to expect in your report based on its title alone.

3) Executive Summary (sometimes also called an “Abstract”)
This type of summary is commonly included in business reports. Its purpose is to provide a preview of what is to come in the report; to highlight the report’s main points/ideas; and to function, in some instances, as a “substitute” for the report itself, when, perhaps in a business context, reading the entire document is not immediately possible. The executive summary, then, plays a significant role in the report as a whole, as it represents the core of what the writing is about. An executive summary can be written in paragraph form, and/or organized by headings. Summary lengths vary depending on the nature of the summary itself as well as the complexity of the report, the requirements of the assignment, and the preferences of the person who has requested the information (in this case, your instructor). That said, a common recommendation among report writing experts is that the executive summary should not exceed 10% of the report itself.

As the executive summary must represent the main ideas conveyed in the report (and their significance to the report as a whole), it cannot effectively be drafted until the introduction, body and conclusion of the report have been written. The information included in these 3 sections will help you determine what must be conveyed in the summary itself: focus on representing all the report’s most significant points by identifying key terms and concepts, and by omitting the vast majority of supporting details. Ultimately, your reader should be able to read the executive summary and see it as a comprehensive, but condensed version of the report itself.

A strategy for writing the executive summary: Review your finished report and capture the key points/ideas (in a word or two) of each section. Include a limited number of supporting details to anchor the key points you’ve identified. Use this “map” of main points and details to construct a condensed representation of your report: link these ideas with transitions (e.g., words like “however,” “additionally,” “moreover,” “consequently”) to help your reader trace the connections you are making. Finally, consider including the most substantial and over-arching “main point” in the first line or two of your summary, so that your reader has immediate insight into your report’s focus. A typical introduction to such a summary, then, might be something like, “This report offers a profile of ____________” or, “The purpose of this report is…”

4) Table of Contents
The table of contents provides a list of the report’s various sections, organized by headings/subheadings and corresponding page numbers. This section appears on its own page, and
provides readers not only with a quick way to locate particular sections/features of the report, but also insight into how the information has been conceptualized and represented.

5) List of Figures
This section offers a list of the figures or illustrations that appear in the body of the report, along with their corresponding page numbers. This list follows the table of contents, and appears on its own page. Figures (e.g., charts, tables, etc.) are often used to assist a writer in conveying information, and in supporting or illustrating key ideas. (Note: be selective about the figures you choose to include: they should supplement the ideas you communicate in your report, not overshadow or distract from them).

6) The Report
6a) Introduction
An introduction is your reader’s gateway to the body of the report. Your introduction should acquaint your reader with what the report contains. Consider including the following key features, as identified by Guffey (2005, p. 462):
- **Background on the report:** What has prompted this writing? As reports generally stem from requests for information, your primary reader (and additional readers) will likely benefit from hearing your articulation and/or reiteration of what motivated this research (e.g., “Little information on ________ is currently available…” or, “This report emerges from a need for more information on…”)
- **Purpose:** Identify what the report is meant to do; establish its claims/main finding(s) and goal(s).
- **Significance:** If appropriate, articulate the importance or value of this report, and, if applicable, this report’s contribution to an understanding of the particular topic. Quotations, paraphrases or summaries of others’ ideas can be included, as they may well help you in establishing the report’s significance.
- **Scope:** Inform your reader of what the report will contain, and what it won’t. This will help establish for your reader the parameters of this particular document.
- **Organization:** Identify the way(s) in which you’ve organized the body of the report: what you will examine first, what this will lead you to, etc. Announcing this in the introduction will help your reader focus in on and prepare for what’s to come.

6b) Body
The body of the report will reflect the outline and questions on the group report assignment sheet; therefore, no one specific format is recommended. The results of your research (evidenced by quotations, paraphrases, summary, figures, and advanced through examples, analysis, synthesis, etc.) will appear in the body, ideally organized by headings (and possibly subheadings, too) that capture your report’s main ideas/focus. How you organize the ideas in the body will largely be determined by your topic, the information you obtain/don’t obtain, and the ways the information you find most meaningfully combines. Experiment with the most effective ways of arranging your findings (and titling the various sections within the body). To do this, ask the following: what order will best suit your reader’s needs and expectations? What order will best reflect your research, and the ways your research findings seem to interrelate? What key words/phrases should appear your headings and subheadings that best capture the ideas that follow, and where should these headings be placed?

6c) Company Outlook
The concluding section of a report should not simply be a retelling of its introduction. Remember, by the conclusion, your readers have gained knowledge from your report; as such, they will want an opportunity to review your main findings and, often, the greater significance of these by way of your recommendations. In the case of this report, you will organize your concluding remarks in the form of a “company outlook.” What has this research revealed overall? This section is your opportunity to tie together all the information you have presented in the body of your report and offer your overall perspective and recommendation.

7) Bibliography (otherwise known as a “reference list” if using APA citation style)
A “bibliography” is the generic term used to describe the list of sources that appears after your
report’s concluding section. The sources included on this list should be arranged alphabetically by way of the authors’ last names, and only those articles whose ideas you have summarized, paraphrased or quoted should be included. The detailed bibliographic information on this list should therefore correspond with the in-text citations that appear in the body of your report. For information on formatting your reference list entries, see the Writing Centre’s APA handout (available online or in each Writing Centre).

An in-text citation in APA style might look something like the following:

Kessler (2004) describes “proactive” and “reactive” strategies connected with organizational innovation... (p. 291).

Or

Various “proactive” and “reactive” strategies connected with organizational innovation (Kessler, 2004, p. 291) are used...

The corresponding entry on the reference page would then appear as follows:


8) Appendices

The appendices of a report – optional pages of supplementary information – typically appear after the bibliography. This section usually contains any letters, charts, data or other supporting information that would help the reader understand ideas in your report, but that would have been too extensive and/or distracting to have in the body of the report itself. Each appendix you include should fall on a separate page and be labeled using letters rather than page numbers, as a way of distinguishing them from the report itself (e.g., Appendix A, Appendix B, etc.).

To refer your reader to an appendix or multiple appendixes, indicate so in parentheses:

Office space has been designed to foster creativity (see Appendix D for sample floor plans). ...patterns of industry growth over the past 5 years (see Appendixes B and C)...

Final suggestions:

- Establish a timeline and/or checklist to help you organize and track the various tasks you must complete. Ensure your timeline works well with each member’s schedules.
- Delegate tasks based on group members’ interests, skills, schedules, etc.
- Begin your research now! Make use of your Bus. 100 Research Guide (see your course website) and consult with the librarians if you need research assistance.
- Maintain regular contact with each group member in order to confirm each other’s progress, lend support, pose and respond to questions, address pressing concerns, etc.
- Divide the writing responsibilities equally among the group members, set a deadline for completing first drafts, then read and comment on each member’s contributions either in a group editing session or separately. Consider appointing a managing editor (not necessarily the team leader), who can coordinate the revision process (including how and when documents are cycled) and ensure consistencies in style and format. This will help you ultimately compile a more cohesive document – one that reflects all of your efforts.
- Revise as needed, assemble the report in order of related sections, then re-read and revise! Revising takes time, so schedule with this in mind.
- Create and adjust headings to capture the key ideas/points you have included in each section.
- Identify main ideas from the report, and use these to build your executive summary.
- Maintain a list of all sources consulted throughout the research process.
- Visit the Writing Centre if you have questions about your work or would like feedback.

Sources cited in this handout: