

## 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. Readers will want to know what the reason for the report is and how you found your information. Consider how much your audience knows about your project and what types of information they need most. 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,

### TECH NOTE

#### Creating Templates for Short Reports

You can use your word processor's template function to create professional-looking reports. Templates are predesigned formats for page layouts that specify style elements of a document. They allow you to automate designs for periodic, sales, progress, incident, and other types of reports. An existing template will format information to create a professional-looking report. Using templates, you reduce the risk of errors, omissions, and inconsistencies and ensure that you follow your company's style and format.

To create a specific report template, simply set the format options (such as font, margins, and line spacing) for a new document, type place markers for your text (including headers, footers, and titles), import custom visuals (such as a company logo), and save the document as a template. When you need to create a new report using the template, simply open it, insert the content of your report, and save the document under a new file name. You can customize the formatting of any or all of the following elements:

- Headers, footers for a company address, titles, and dates
- List formatting, such as bullet-point style and numbered lists
- Line spacing and text justification
- Font style, size, and color
- Standard graphics, e.g., a flowchart, organizational charts, or infographs
- Margin size, paragraph indentation, and columns
- Standard visual elements such as tables, which can also be filled with the data appropriate to your report
- Automatic table of contents based on the titles used in your report

But when using templates keep the following precautions in mind:

- Be sure to follow your company's style when creating templates, particularly those including a company logo.
- Double-check everything in the template to be sure it is appropriate for the kind of report you're writing. Differences between reports may require visual adjustments, to margins, headers, footers, line spacing, list formatting, etc.
- When creating a template with place markers to indicate the position of certain textual elements, insert them in boldface for emphasis. Using brackets (for example, **[type title here]** or **[body of text here]**) will highlight and thus emphasize these place holders.

personnel, and schedules, for example. Similarly, audiences outside of your company (clients, media, community agencies, etc.) will likely not be interested in technical information. Rather, they want information that helps them understand your company, how it works or serves customers, and how to interact with it.

All audiences, however, want clear and concise information about the topics these readers need to know. For more information on how to make your reports concise and easy to follow, see “Write Clearly and Concisely,” page 560.

## 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 messaging, tweeting, emailing, or leaving a voicemail 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 one plan over another. Some frequent types of research you can expect to do on the job include:

- verifying data in reference manuals or code books
- searching online archives and databases for recent discussions of a problem or procedure
- comparing and contrasting competitor’s products or services on social media and other sources
- reading background information in professional and trade journals
- pricing equipment
- preparing a budget
- reviewing and updating a client’s file
- testing equipment
- performing an experiment or procedure
- conferring with or interviewing colleagues, managers, vendors, or clients
- visiting and describing a site
- attending a conference, trade show, or workshop

Never trust your memory to keep track of all the details that go into making a successful short report. Take notes, either by hand or on your mobile device. Collect all the relevant data you will need—names, model numbers, costs, places, technology, etc.—and organize this information carefully into an outline, which will help you interpret these facts for your readers. (Review Chapter 8 for the variety of research methods used in the world of work.)

## 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. Here are some guidelines to follow:

- Omit irrelevant information.
- Make sure it is up-to-date.