



GOLD COAST INSTITUTE OF TAFE

**FACULTY OF e-COMMERCE AND
BUSINESS**

THE REPORT WRITING GUIDE

**How to Plan, Write and Present
An Effective and Professional Report
For Work or Study**

Paula Moffatt

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THIS REPORT WRITING GUIDE

Writing an effective report for work or study may seem a daunting task, whether it is a first attempt or not. Like any task you don't do regularly, it helps to have a format to follow. Check if your computer has a report template, or create your own!

The following headings and layout will help YOU stay on track. This will mean that THOSE WHO READ YOUR REPORT should find it easy to follow the information you present and be impressed by your professional approach.

This guide contains the following sections:

A	Key criteria that an effective report should meet	Page 2
B	How to go about your report task and complete a professional effort every time	Page 3
C	The required report format: what goes where... page by page content notes as well as writing and presentation tips	Page 5

A KEY CRITERIA: A Handy Report Writing Checklist

Your report MUST ...

- HAVE A CLEAR PURPOSE** Think not only **WHAT** you should write about, but **WHY!** Write your purpose as one sentence to keep you on track; eg *In this report I will compare the price and functions of photocopiers ... so that the Manager can decide which best suits our organisation's needs.*
- BE COMPREHENSIVE** Your research must cover all aspects of your topic. If you decide to limit your information in any way, then say so, and explain why. And don't forget to acknowledge all sources of information as per referencing rules!!
- BE COMPLETE** Provide all the information your reader needs. Sometimes this prompts the question... "What everything?" If you think your report will be too unwieldy then choose carefully what should go in the report and what should be attached as an appendix.
- BE ACCURATE** Check your facts and check your figures. In business, mistakes cost \$\$\$\$\$. **YOUR CREDIBILITY** (and your career) depends on reliability; in your studies, accuracy is the only way to get good results.
- BE UP-TO-DATE** Check that you have the latest figures; eg that prices are current, that regulations include recent amendments. Unless your report provides a historical perspective, having the latest information is vital.
- REMAIN RELEVANT** Sometimes you can get carried away with your topic! Keep your purpose statement in front of you at all times!
- PROVIDE BALANCE** Detail both the *for* and *against*, the *good* and the *bad*; eg *a report detailing the need for new computers must clearly identify benefits and costs; anticipate any problems... and how to overcome them.* Too many reports are all shining light, and therefore ... biased!
- BE ORGANISED** A report is a lengthy document. If the writer gets disorganised, there is little hope for the reader! Use the required headings and format (see section C); stick to your schedule (see section B), and you should stay on track to complete a professional document.



A KEY CRITERIA (Continued)

9. USE READER FRIENDLY WRITING
Forget the big words, and NO PADDING! Use simple language. If technical terms or abbreviations are called for, include a glossary. Write short sentences. Incorporate diagrams where you can. By spinning out the tale, you will confuse yourself, and you won't for a minute fool your reader. Inform, don't frustrate! Your professional credibility is at stake here!
10. PROVIDE A PROFESSIONAL DOCUMENT
Carefully proofread. Check format and consistency. Seek feedback. Deliver on time. Make this a useful exercise, for you and your reader! In business a report should result in sound decision making. Make sure your report creates the impression you intended!

B HOW TO GO ABOUT DOING A REPORT

We talk about report *writing*, but that is really only part of the task. YOU must PLAN the report, RESEARCH it, WRITE a draft, EDIT, POLISH, then put it all together and PRESENT it! And because it is a task you do over time and in stages, YOU NEED A SCHEDULE TO WORK TO!

✓ Planning

Think about your report topic: eg the depth required. Check any topic uncertainties or specific focus. Confirm the due date. For study you need to know the marking criteria; for work check relevant resources, assistance, and information already available... Think about the assignment as soon as possible and ASK FOR ALL YOUR QUESTIONS EARLY.

THEN LIST all the separate activities that you have to do to complete the task. From thinking, all your research tasks, booking computer time, compiling, binding... you should have at least 20 activities or more. Allocate time for each. This is your action plan or schedule.

Adjust this schedule as you go if necessary. This step by step progress gives you confidence, stops the task from overwhelming you, or interfering with other commitments, and gives a better result. Each time you complete a listed activity, make a note, or tick it off on your schedule. This enables you to know exactly where to start the next time you take up your report writing task.

It works!

✓ Research

Brainstorm! List what information you need and where you might find it. Write down everything that comes to mind. Only when you have run out of ideas, sort, organise and analyse what you have come up with.

Keep tabs on your action plan or schedule. Allocate research time. Check starting and finishing time. Always research with a purpose. Ask yourself... "Is this relevant?" Sometimes you may change your direction as a result of finding an interesting new angle, or as a result of drawing a blank; go back to your purpose and your time plan and make the adjustment. List your methods of investigation for the introduction of your report, and if in doubt check this list with your teacher (if for study), or your supervisor (if for work). Remember to keep notes on your sources: eg author, date, title, publisher, page number. (See Bibliography). This will give your report authority and credibility. (It also helps you to go back and check, or seek further information easily.)



B HOW TO GO ABOUT DOING A REPORT (Continued)

✓ **Draft**

Your best tool is your computer. At this stage set up your report template. Use the required headings, and include the subheadings you want to use. For each subheading list the key points you have so far. This will give you an overview and some idea as to whether you have enough information. Check your purpose statement!

Fill in the framework, by putting your points into sentences and paragraphs. Don't forget your reference notes. (Make sure you have a footer on your document incorporating the date... this way you cannot mix up your hard copies.) **BACK UP YOUR DOCUMENT!!**

✓ **Edit**

It's a good idea to edit your work each time you resume your report task. You tend to be more objective this way. It also helps you get back on track, and confirm that you are sticking to your purpose statement. Re-read, correct, check sentences and spelling. After completing your report, take a break before your final edit. Find someone you respect who will read the report for you and give useful feedback. Tell them beforehand what you expect from them. Refer back to **Section A Key Criteria**.. Does your report meet them? Draft your title page.

✓ **Polish**

Make your title page look good. Remember some organisations have a set format. Check that your bibliography is complete. Are your appendices ready for presentation? Remember your appendices might contain special brochures, diagrams, survey forms – anything that will support your report and that the reader may find helpful or interesting. Check that you have referred to your appendices in the main part of your report: eg “... for more product information detail see brochure Appendix 1”.

Finally check your page numbers against the contents page. Complete any graphs, add illustrations (with titles). Put all the parts of your report together. Before you bind or staple, prepare the required number of copies.

✓ **Present**

Check deadline and presentation procedure. You might have to present your report to a committee or at a meeting (at work) or formally to your class. If you have to send it, or leave your report for someone to read later, prepare a short letter or a memo to create interest. Make an impression!

**When your report has taken so much time,
it is just that little extra attention to detail
that makes the difference!**



C FORMAT, CONTENTS AND TIPS: What Goes Where!

A complete report usually has the following parts:

COVERING LETTER or MEMO, or *with compliments SLIP*

COVER or TITLE PAGE

SYNOPSIS (or ABSTRACT or EXECUTIVE SUMMARY)

CONTENTS PAGE (with page numbering)

1 INTRODUCTION

1.1 Aim

1.2 Authorisation

1.3 Sources of Information (or Method of Investigation)

2 FINDINGS (or RESULTS OF INVESTIGATION)

3 DISCUSSION (or ANALYSIS)

4 RECOMMENDATIONS (or CONCLUSION)

5 CLOSE

BIBLIOGRAPHY

APPENDIX/APPENDICES

(NOTE) There **are** alternative report formats. They all focus on the same key criteria, but may vary in use of headings and numbering systems. Check the specific requirements with your teacher or supervisor.)

We will now detail the requirements for each of the above parts of your report. Note that the shaded area on the following pages represents a sample page format. (The company name and report details have been created as an example only).



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Cover or Title Page

<p>QUEENSLAND SOUVENIRS PTY LTD</p> <hr/> <p>An Overview of Current Quality Management Concepts Being Adopted in Australia</p> <hr/> <p>A Report for Supervisors</p> <p>Prepared by Chris Taylor Marketing Manager</p> <p>4 April, 2003</p>
--

**THE BOARDED SECTION OF EACH OF THE FOLLOWING PAGES
REPRESENTS THE ACTUAL PAGE OF THE REPORT**

- | | |
|---|---|
| <input type="checkbox"/> REPORT TITLE: | <ul style="list-style-type: none"> ✓ Must be comprehensive ✓ Clearly indicate report's scope and purpose (at least 2 lines) ✓ Include name or organisation |
| <input type="checkbox"/> AUTHOR: | <ul style="list-style-type: none"> ✓ Include name and title/department to lend authority and as a point of reference |
| <input type="checkbox"/> DATE: | <ul style="list-style-type: none"> ✓ Shows currency of information for future reference |
| <input type="checkbox"/> PRESENTATION: | <ul style="list-style-type: none"> ✓ Should create a professional impression – make it support and create interest in (not distract from) your report |



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Synopsis (or Abstract or Executive Summary)

QUEENSLAND SOUVENIRS PTY LTD

SYNOPSIS

What is Quality?

QUALITY is the current catchcry. Unlike many other seemingly faddish business ideas, the *quality* message is not one that is likely to go away.

Consumers are becoming more concerned about products living up to their expectations. Complaints are bad for business, and we cannot afford to pile up rejects, or contemplate selling "seconds".

We have both international and Australian customers. They are looking for genuine Australian or Queensland products. There is increasing pressure on our company to market locally made items that are useful, that last, and that reflect each area's special qualities.

The message we are getting from the retail outlets is NO JUNK!

This report is the first step in our concern for quality. It is a report that explains the concepts and provides examples. It is designed to generate discussion at our next general meeting to be held in March.

Overview of Quality Management Concepts 2003

NOTES

- A Synopsis is usually a requirement for longer reports
- Choose the heading (Synopsis, or Abstract, or Executive Summary) as preferred by your organisation or teacher.
- The synopsis provides a summary or overview of the report and should:
 - Give insight into scope or depth of topic
 - Point out relevance or importance of topic
 - Create interest in your report
- Presentation: make use of your page; center your synopsis, or use larger print size or extra spacing. Note there is no page number. Use headers and/or footers which must include (for the purposes of Gold Coast Institute of TAFE and Faculty requirements your name, student number, qualification code and name, date printed, version number, page x of y.



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Contents Page

QUEENSLAND SOUVENIRS PTY LTD	
CONTENTS	
	<i>Page</i>
1 INTRODUCTION	1
1.1 Aim	
1.2 Authorisation	
1.3 Sources of Information	
2 FINDINGS	2
2.1 Australian Made Campaign	2
2.2 Australian Standards for Manufacturing	3
2.3 Quality Systems	4
2.4 Total Quality Management	5
2.5 Quality Options for our Organisation	6
3 ANALYSIS	7
4 RECOMMENDATIONS	8
Bibliography	9
Appendix 1: Quality Standards Applying to Manufacturing	
Appendix 2: How Australian Postcards has Implemented Quality	
<i>Overview of Quality Management Concepts 2003</i>	

NOTES

- Page numbering starts with the Introduction. (TIP: check that the page numbers still agree with those listed in your contents page AFTER you have completed all your editing.)
- Include all headings and subheadings with reference numbers. The longer and more complex your report, the greater need for accurate page referencing and subheading detail.
- TIP: Use your contents page as a style guide. Establish a consistent style for headings, subheadings and format. (Note that the 4 major headings have the same size print and the same numbering; similarly the subheadings; note also how the numbers for minor headings begin under the first letter of the main heading).
- Planning your headings and page layout ensures that:
 - You are consistent in your presentation
 - Your report is well organised
 - Your report looks professional

C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Introduction Page

<p>QUEENSLAND SOUVENIRS PTY LTD</p> <p>An Overview of Current Quality Management Concepts Being Adopted In Australia</p> <p>1 INTRODUCTION</p> <p>1.1 Aim</p> <p>This overview of quality explains current terms and concepts. This report is intended as an introduction to promote discussion at the general meeting in March.</p> <p>1.2 Authorisation</p> <p>Requested by Lyndsay Smith, Managing Director for distribution to all supervisors by Friday 9 February, 2001.</p> <p>1.3 Sources of Information</p> <ul style="list-style-type: none"> • <i>Australia Made Campaign</i> January 2001 Newsletter • The Australian Standards • Discussion with Australian Postcards Company • The Australian Quality Association for references and membership requirements and benefits • Current issues of <i>Tourism Australia</i> (with surveys) • <i>Australian Manufacturing Practice</i> – industry best practice <p><i>Overview of Quality Management Concepts 2003</i> <i>Page 1</i></p>

NOTES

- The shaded section above represents your actual INTRODUCTION page (this is page 1 of your report). Note:
 - Repeat the report title (as this is the actual start of your report)
 - Use the headings and numbering and indentation as above
- Note that the AIM/s of your report should be an improved version of your original purpose statement (see page 1 of this guide)
- List your sources of information carefully. You will see some reports listing sources of information in even greater detail. Remember why you include this section at all – it gives your reader some idea as to how comprehensive your research is. (Some reports actually use their source items as subheadings in the FINDINGS of their report).
- Make sure you show in the FINDINGS what information came from each of the sources listed here.
- TIP: This INTRODUCTION page is an excellent planning page. If you are not sure about your approach to your report, draft this page and check it with your teacher or supervisor.**



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Findings (or Results of Investigation)

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2 FINDINGS

The details which follow are meant as an introduction to quality concepts. The literature and information coming from organisations that have adopted various approaches to quality, all emphasise that there is no simple recipe. "Commitment to quality takes time and effort and must suit the particular needs and structure of the individual company." (*Australian Manufacturing Practice 1994:10*)

2.1 The Australia Made Campaign

This is an ongoing commitment of the Advance Australia Foundation. Not only does the Foundation promote Australian made products, it is also committed to endorsing quality products and services. Its Quality Manual (1992:4) explains the many terms associated with quality. Our organisation has a copy of this manual which can be borrowed from the Managing Director's secretary, John Brown. It provides the following concepts:

2.1.1 Quality Perspectives

Quality can be assessed from a number of sources: from the company itself, by comparison with similar or competitive products, and from the customer who has actually purchased and used that product.

2.1.2 Quality Assessment

The company, when designing a product for its customers, must determine what aspects of quality to build into that design, and how to ensure those quality design elements can be consistently produced for each item.

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Page 2

NOTES

- The FINDINGS section is the heart of your report. It provides an organised outline of the information you researched. There is NO ROOM HERE FOR WHAT YOU THINK! The facts must be presented without comment or bias. FACTUAL AND VERIFIABLE. Make it clear where your information has come from: eg *the company accountant has identified current budget at....* Note that the publications referred to is listed in the Bibliography.
- The heading FINDINGS appears in the same format as the heading INTRODUCTION on the previous page. Note the required indentation for each subheading. The page looks well organised. The reader is not overwhelmed by the page because there is plenty of white space.
- ALWAYS REMEMBER: Findings provide the facts. You are providing step by step details which will take your reader to the conclusions or recommendations that you draw in the final section of your report.
- You can see also that the information in the FINDINGS, comes from the SOURCES OF INFORMATION listed in the INTRODUCTION!



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Findings (Continued)

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2 FINDINGS (Continued)

2.1 The Australia Made Campaign (Continued)

2.1.3 The Australian Made Product Directory
 Our organisation currently has 4 of our products listed in this directory. These are:

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2 FINDINGS (Continued)

2.2 The Australian Standards for Manufacturing

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2 FINDINGS (Continued)

2.4 Total Quality Management

The terms, concepts, and assessments discussed so far, identify 3 distinct areas of quality that can be applied to individual organisations. These are:

- Quality Standards
- Quality Systems
- Total Quality Management

Although different organisations have tended to follow one of these 3 approaches, they can be combined very effectively as the following diagram indicates:

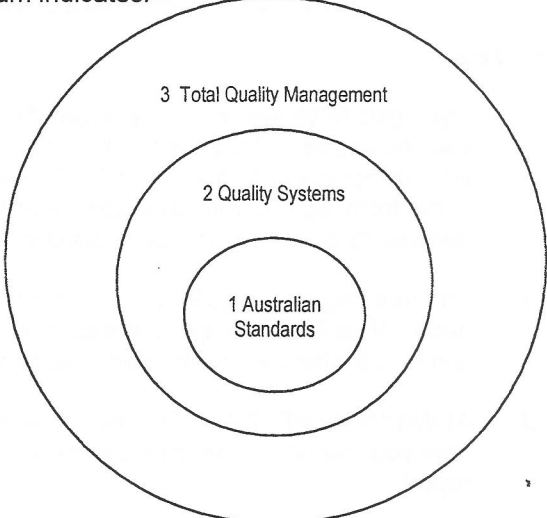


Figure1:
 Integrated
 Quality
 Management

NOTES

Plagiarism – A common mistake made by students is the copying of ideas, sentences or sometimes whole paragraphs from reference sources.

Is that wrong?

It is if you pretend these are your words. By all means quote from expert sources. I you copy the words use quotation mark "...". And list in your bibliography.

C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Analysis (or Discussion)

QUEENSLAND SOUVENIRS PTY LTD

3 ANALYSIS

In applying to our organisation the quality concepts listed in the Findings, it is evident that there are many quality processes and outcomes already implemented at *Queensland Souvenirs*.

These included our Australian made approved standard products such as the Platypus placemats, the outback sheepskin boots, and the Aboriginal motif fashions. Our recent celebration of our Tourism Supplier Achievement Award, is another indication that our products and service is meeting high standards.

It appears that these are the result of individual initiative from which the whole company has benefited. As detailed, quality experts believe that organisations can benefit from everyone in the company taking a quality approach.

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3 ANALYSIS (Continued)

If we were to follow the integrated model, The Australian and International Standards would need to be applied to all our design and production efforts, not just a few. This might result in a reduction in component imports, as the quality systems we introduce could mean that we can produce items more cheaply and with customised components.

Discussions with supervisors at our previous Innovation Seminar (Findings 2.5 and Appendix 2), indicated that many of our staff have creative ideas for new souvenir products. Quality systems would provide an opportunity to develop and test these ideas within a framework.

The adoption of these could provide rewards and incentives for our staff.

Supervisors and staff it seems need not fear quality management as something new, for improvement is something that most sections have always pursued. What quality management can do is provide the framework that supports these improvements.

NOTES

- ☐ Always use third person in report writing. This means avoid use of "I" or "we". Instead use statements like "the information shows", "discussion of the topic identified...", or "the survey supports...". This helps you to be factual and reduces bias.
- ☐ Note carefully how to maintain the links from one page to the next, through headings and format.
- ☐ The ANALYSIS, applies the information in the FINDINGS, to the particular needs or circumstances of the organisation (as in the example). You as the writer have to draw all the issues together in this section.



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Recommendations

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4 RECOMMENDATIONS

As this report is intended to promote discussions at the general meeting in March, it is recommended that all supervisors:

- 4.1 Consider the quality issue outlined.
- 4.2 Prepare a brief outline (point form) of quality aspects which are currently in place, and which they consider might be applied to the sections/processes they are responsible for.
- 4.3 Identify the approach they consider might be most appropriate for our whole organisation considering advantages and disadvantages of the various approaches.
- 4.4 Come to the meeting in March with an informed but open mind to develop a frame work for quality management for the next 5 years.

CLOSE



Chris Taylor
Marketing Manager
April, 2003

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NOTES

- The recommendations should provide a plan for action – what needs to be done as a result of the information provided in the report. No reasons are provided because these should already have been covered in the Findings and Analysis.
- Recommendations are usually brief and numbered.
- The Recommendations must come from the information presented and discussed in your report. If there is insufficient information to draw conclusions, then one of the recommendations may be to complete further research into some specific aspect of the report.
- Note that the CLOSE comes immediately after the recommendations. This is the writer's signature, name, position and date. Sometimes you will find the title of the report repeated in the close.



C FORMAT, CONTENTS AND TIPS (Continued)

REPORT FORMAT: Bibliography

QUEENSLAND SOUVENIRS PTY LTD	
BIBLIOGRAPHY	
Advance Australia Foundation	1990 <i>Advance Australia Quality Manual, 1992</i> pages 4 – 5
Andrews J	1992 <i>Four Corners</i> , ABC Television Interview with Tony Smith, 29 January, 8pm
Australian Manufacturing Practice	1994 <i>Quality Control</i> Vol 5 No 9 pp 34 - 37
Australian Quality Association	1996 <i>Introducing Quality</i> (video recording) 15 Minutes
Australian Made Campaign	Newsletter, January 2001
DBIRD (Dept. of Business, Industry & Regional Dev.)	1997 List of Quality Management Courses
Maranti, S	1999 <i>Lessons Learnt from Quality in Manufacturing</i> Herculan Press, Brisbane page 76
Tourism Australia	2000 September and December issues
Please Note: The above references have been created as an example only	
<i>Overview of Quality Management Concepts 2003</i> <i>Page 9</i>	

NOTES

- ❑ The BIBLIOGRAPHY contains specific details of all quoted reference material: that is articles, books, videos, television programs, interviews, etc. Also included here are sources from which you gained ideas which you put in your own words or form the basis of information provided.

As stated earlier, a report requires considerable research, and you will often increase the credibility and authority of your report by clearly identifying your expert sources.

- ❑ Note the order within each bibliography or reference item: author, year, title, publisher, place of publication, any other details, page number.

The list is in alphabetical order.





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