

What is a Report?

- Reports are essential in the business world. They can range from the informal – such as verbal daily reports – to highly technical formal written reports. A report's main purpose is to present data in a logical and readable fashion. Reports are often commissioned in order to help make decisions and solve both ordinary and national problems (Bail out of Air New Zealand).

List three situations in the travel industry where a report may be commissioned?

- 1.
- 2.
- 3.

Why use a report style?

- Reports are the easiest way in which to present clear factual information and graphical and photographic evidence. They also present the reader with a summary of the situation and hopefully suggestions and solutions in the form of recommendations.

Four different forms of reports:

- Form reports – weekly sales figures, staff attendance
 - Progress reports – progress of project to date (memo format)
 - Periodic reports – prepared on a regular basis – monthly absenteeism
 - Letter reports – presents material for external communication in a short informal report format
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- Reports also provide the reader with the facts upon which to base a decision
 - Report format also saves time. If you are a busy executive or manager than you don't always have the time to wade through a lot of information. Sometimes it is easier just to look at the summary in the first instance.

Report Order

(Report presentation) fill in the lines below in the correct order (as you would read a formal report but not as you would compile one)

Title Page

Should contain:

Table of Contents

Should list:

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Summary

A summary is a condensed version of the introduction, discussion and conclusion and recommendations. It should contain the who, why, what, when and how of your report process. It should not contain any new information

eg.

Introduction

Background

Discussion

Body of the Report

Points:

Conclusion(s)

Your findings

Recommendation(s)

The Action Plan

Points:

References

Sources of Information

You must:

Appendices

Attachments

Title Page

This is most effective when uncluttered and easily read. (Refer to section earlier in your workbook).

Table of Contents

Contents of report listed by heading and subheading. (Refer the section earlier in your workbook).

Using a system for headings and subheadings

Reports need to be placed in a logical order. This is best achieved by labelling sections in a category of importance.

eg. A. Discussion

- 1.1 Why choose Dunedin as a location for Cadbury's
- 1.2 Would Auckland provide a better location for Cadbury's
 - a) SWOT analysis - strengths, weaknesses, opportunities, threats

Summary

This is a summary of the whole report.

- It contains the **main points** but no new points
- Its main purpose is to save time for readers who are too busy to look at the entire report.
- It outlines what you did, how you did it, why you did it, who you did it for, who funded it, the limits of your investigation, what you found out (results, conclusion), what you recommend.

It is important to bear in mind that the summary is a condensed form of your report, the core. The real information is still retained in the report and the reader will gain a better understanding of the issue by reading the entire report. The summary is more of a time saving measure.

Introduction

The introduction is like a **general overview** of the investigative process you will need to develop to produce the report. **This is not a summary of the whole report!**

For example:

- What the purpose of the report is – and who it is written for
- To give the reader some background
- To look at the issues being explored.

State the change, problem or issue, which has brought about the need for a report.

Outline the scope of the report – by explaining the extent of investigation and any limitations that may have affected your conclusions or recommendations (ie. limited resources or time, assumptions you had to make)

Preview the report structure – outline how you have presented the information so that the reader knows what to expect (do this very briefly)

For example:

This introduction will be followed by the discussion and conclusion/recommendations, appendix and references

Discussion/Findings

This is the main body of the report and the section in which you provide the most information. It is important to keep the reader (and what they need to know to understand the issue) in your mind while writing this section.

- Present the facts you have researched (use references)
- Use full sentences
- Use headings and subheading to help the reader identify the content
- Don't waffle just to fill in space!
- Don't include too much graphical evidence – instead refer the reader to the appendices – where your graphs will be presented

Conclusion/Recommendations

This may be combined or in two different sections.

- Tie in the major information from your Discussion section eg. As discussed in the earlier section, for Cadbury's to move to Auckland

would result in major expenditure which in the long run will prove unnecessary because.....

- Arrange this section so that the major conclusions come first
- Keep it short (full explanation is given in the Discussion section)
- Follow logically from the facts in the Discussion.
- Number your recommendations eg.
 1. Following intensive financial investigation we believe it would be more viable for Cadbury's factory and head office to remain in Dunedin
 2. That a report be commissioned to look at setting up a smaller branch office in Sydney to deal exclusively with global trading.

References

All resources used in the report must be acknowledged here.

Why:

- To distinguish honestly between your ideas and someone else's
- To let markers see the range and quality of you reading or investigation for a particular topic
- To direct reader to particular sources for further information

If you quote directly make sure you use quotation marks and add the page number to your reference.

"I saw the UFO appear from a northerly direction, it had bright lights and was painted orange."

Examples of References:

Book

Jones, K. P. (1999) *Report Writing*, New York, USA, Brown & Son.

Journal

Beckerman, L.J. and Seligman, C. (1981), Welcome to the energy crisis. *Journal of Social Issues*, 37 (2), 1-7.

Internet

Internet Site: <http://www.dunedin-visit.co.nz/>

Appendices

Graphics or pictures that are too bulky or complex to be put in the main discussion section are placed here. This way they add to but do not distract from the main points.

They should be:

- Clearly and neatly set out
- Numbered
- Given a title
- Be arranged in the order that they are mentioned in the text

Not every report contains an Appendices section.

All appendices should be set out in alphabetical order eg.

- ➔ **Once a report has been drafted, it should be checked to ensure it fulfils its exact purpose**
- ➔ **All spelling and grammar is correct**
- ➔ **Nothing has been omitted**

REPORT FORMAT

Title Page

[no more than 15 words]

Table of Contents

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Introduction

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Conclusion and Recommendations

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Appendices

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References

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