

Chapter 11: Formal Reports

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Overview

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Formal Reports

- ▶ Most commonly produced documents in technical workplace.
- ▶ They are typically created to be a response to a research question.
 - Data and fact focused.
- ▶ They are usually made at the beginnings and ends of projects.
 - Pave the path for the project being done.
 - Summarize what was done and brings the project to completion.

11.1: Types of formal reports

- ▶ Generally formal reports include finding and make recommendations but vary based on the goal that needs to be accomplished.
- ▶ **Research Reports:** These reports focus on the findings of a study.
 - ▶ Focuses on cause and effect.
- ▶ **Scientific Reports:** This is used to mark the completion of an empirical project.
 - ▶ Research Question – Hypothesis – Methods – Results – Conclusion
- ▶ **Completion Reports:** Report done when a project is completed to communicate the outcome with management or clients.

Types of formal reports cont.

- ▶ **Recommendation Reports:** These reports suggest actions that should be taken in certain situations.
 - The report includes a study of the problem, presents solutions, and then recommends which would be best.
- ▶ **Feasibility Reports:** This is used to decide if a project or product is worth investing in.
 - These are done when management or clients are not sure if an action should be taken or not.

11.2: Develop a plan and do research

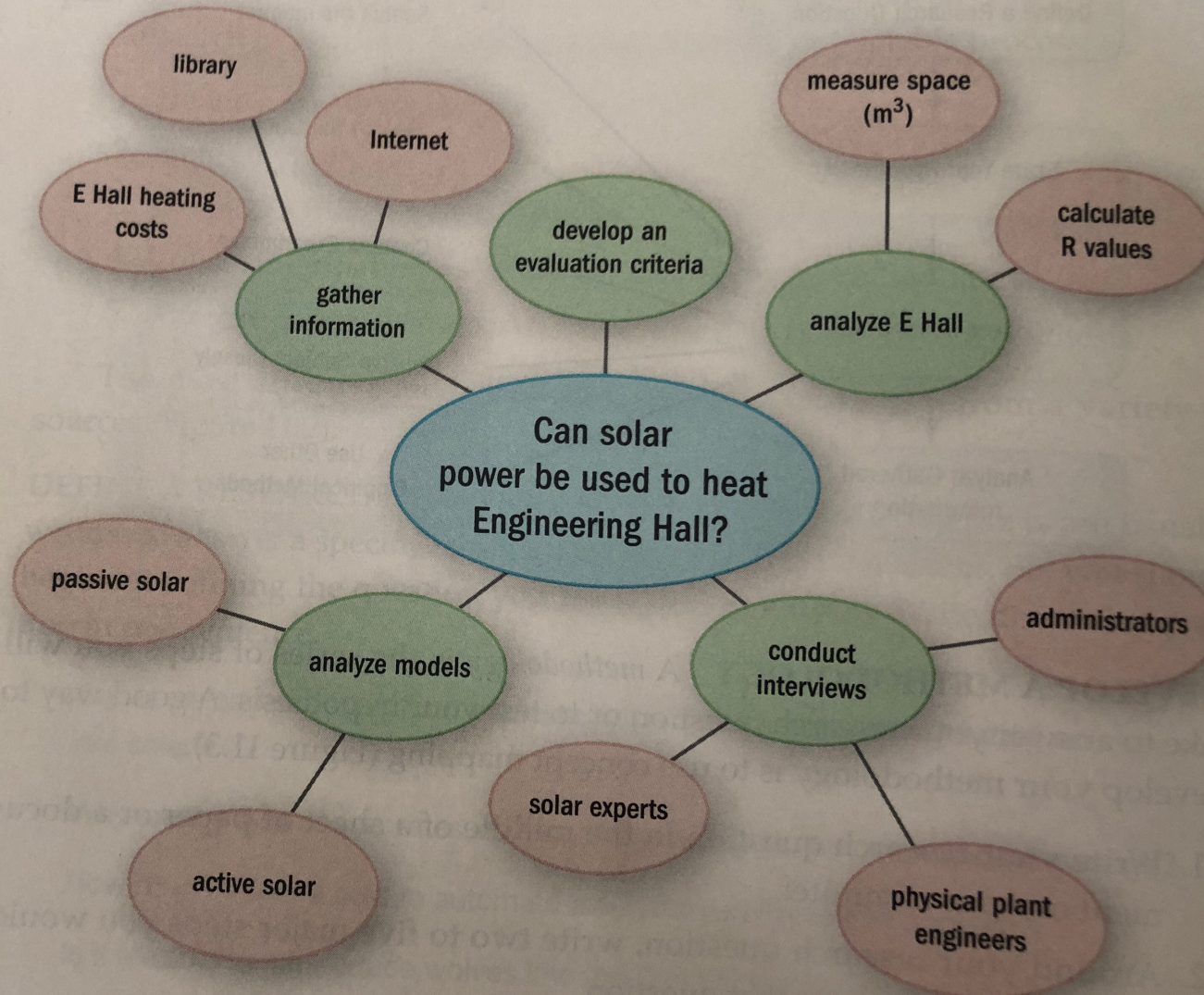
- ▶ Formal reports can be extremely complex documents so making a plan and doing ample research is important.
- ▶ **Planning:** Identify key aspects of the document.
 - ▶ Subject: What will be in the report and what information needs to be included.
 - ▶ Purpose: what the document is supposed to accomplish.
 - ▶ Readers: The audience analysis. Who is the intended audience and what are their needs, wants, and values.
 - ▶ Context of use: Determine where, when, and how the document will be viewed. Physical, mobile, ethical, and economic context.

Develop a plan and do research cont.

- ▶ **Researching:** More in depth phase done when planning is complete. It is broken into four sections.
 - Define a Research Question and Hypothesis: Formal reports typically written to answer a question and test hypothesis this is an important step. Try to write both of these in one sentence. The hypothesis will be subject to change as the project progresses.
 - Develop a Methodology: A methodology is the sequence of steps that is needed to be completed to answer the research question. Using a concept map is effective.
 1. Write your question in the middle of the paper.
 2. Around the question write two to five major steps that are necessary to answer the question.
 3. Around the major steps write two to five minor steps that need to be done to achieve the major step.
 4. Continue to fill out the map and revise.

Figure 11.3 Using Concept Mapping to Develop a Methodology

When you are mapping a methodology, ask yourself how you might answer the research question. Then, decide on the major and minor steps in your methodology.



Develop a plan and do research cont.

- Collect Information: Use the methodology as a guide and utilize different sources of information.
 1. Internet sources (Make sure they are credible)
 2. Library research
 3. Experiments and observations
 4. Other empirical methods (survey, case study, etc.)
- Analyze Information and Modify your Hypothesis: With the new information gathered it is necessary that one revise their original hypothesis to fit the findings.

11.3: Organize and draft a final report

- ▶ The acronym IMRaD (**I**ntroduction, **M**ethods, **R**esults, **a**nd **D**iscussion) is a useful guide for organizing your report.
- ▶ **Introduction:** Should grab the readers attention and set the groundwork for the whole report. Make it straightforward and try to include the six moves.
 - Move 1: Define the subject.
 - Move 2: State the purpose of the report.
 - Move 3: State the main point of the report.
 - Move 4: Stress the importance of the subject.
 - Move 5: Provide background information on the subject.
 - Move 6: Forecast the organization of the report.

Organize and draft a final report cont.

- ▶ **Methodology:** In this part you talk about what you did when researching, especially in the developing a methodology phase. This should provide a step by step guide to how you completed the project.
 - ▶ First Paragraph: Describe overall approach.
 - ▶ Body Paragraphs: The step by step walkthrough of your methodology.
 - ▶ Closing Paragraph: Discuss limitations of the methodology.
- ▶ **Results:** : Summarize two to five of your major findings, leaving out smaller findings that are not important. Provide the data that you found to support your findings.
- ▶ **Discussion:** Discuss two to five conclusions that you drew based upon the major findings.

Organize and draft a final report cont.

- ▶ **Conclude with Recommendations:** The conclusion should be short and to the point. There are six moves that should be done in the conclusion.
 - Move 1: Make an obvious transition that the conclusion has started with a header.
 - Move 2: Restate the main point of the report.
 - Move 3: State two to five major recommendations.
 - Move 4: Stress the importance of your report.
 - Move 5: Discuss future research or possible outcomes.
 - Move 6: Say thank you and leave your contact information.

11.4: Create the front and back matter

- ▶ **Front Matter** is the information that precedes the main information of your report. This information is used to aid the reader. This includes...
 - ▶ **Letter or Memo of Transmittal:** Most reports are accompanied with these and is a way to be more personable with the reader(s).
 - ▶ **Title page:** Including the title, name(s) of the primary reader, name(s) of the writer, company/organization, date of submission, and company logos or graphics.
 - ▶ **Abstract or Executive Summary:** If the report is longer than ten pages it would be beneficial to include this. It entails a one to two sentence summary of all aspects of the report.
 - ▶ **Table of Contents:** Included if the report is over ten pages. Allows for the reader to have quick access to the information they need.

Create the front and back matter cont.

- ▶ **Back Matter** is the information that comes when the report is complete. It is used to help the reader and add extra information. Most people do not read this so no important information should be here.
 - ▶ **Appendix:** Information that may only be important to certain readers and would not be beneficial in the main text.
 - ▶ **Glossary of Terms:** Definition of terms that may be considered jargon or may require further context/explanation.
 - ▶ **Calculations:** This is a way to further show readers how you came to the conclusions and findings that are in the report. This is used primarily for highly technical reports.

11.5: Choose the style, design, and medium

- ▶ Formal reports usually have plain language and are straightforward, though they should not be boring.
- ▶ Use a plain style of language in a persuasive way.
 - Make “doers” the subject of the sentence.
 - Make sentences breath length.
 - Eliminate nominalizations to make your document clear and non-ambiguous.
 - Define jargon and other complex terms
- ▶ Readers are raiders so it is important that the document can be easily skimmed.
 - Use appropriate heading and label graphics.
 - Utilize the column format using two to four columns.
 - Make sure that the graphics aid your words and do not replace them.

11.6: Use google drive to collaborate with global teams

- ▶ Google Drive is an extremely beneficial tool when working with long distance partners.
- ▶ It is free and offers a wide variety of tools that can be used to make many different kinds of documents.
- ▶ Google Drive also provides a way to share documents so that many people can work on it at the same time and also allows you to store these documents.
- ▶ This software can be accessed globally which is a problem that can arise when working with other software.
- ▶ There is one downfall to Google Drive which is that it is not as advanced as Microsoft or adobe products and can cause formatting issues when being transferred.
- ▶ It is a good first step for this kind of communication and working, and the benefits outweigh the shortcomings (according to Rick).

Discussion Question

- ▶ In *Technical Communication Today*, Rick says to only include two to five major findings in your results section and only two to five recommendations in the conclusion section of your technical document. What are some methods or ways in which you can determine how to narrow down what is important to include and what is not important enough to include in these situations?

Citation

Johnson-Sheehan, Richard. *Technical Communication Today*. Sixth ed.,
Pearson, 2018.