

# Cheat Sheet Module 6

## Summary

### Types of Reports

Business reports can be categorized into informal and formal types, distinguished primarily by their length and structural complexity. Informal reports are typically shorter and less structured. They deal with information in a straightforward manner, grouping topics under basic headings, if they are used. Formal reports are longer with a more structured format that includes formal headings. These reports tackle more complex issues, often involving detailed background descriptions, research, and evidence to support conclusions, necessitating a tighter organizational scheme to aid reader comprehension.

Reports also serve two primary functions: informational and analytical. Informational reports summarize data on a specific topic, such as an expense report detailing funds allocation after a business trip. Analytical reports, however, involve more in-depth research and analysis, leading to recommendations based on the findings, like determining the best location for a new store. Additionally, identifying stakeholders—direct, indirect, and remote—is crucial in report writing. This ensures that the report addresses the needs and potential impacts on those affected immediately or in the future by the report's contents.

### Informal Reports

Informal reports are commonly due to their brevity and simplified structure compared to formal reports. These reports are predominantly for internal use, though some may be shared externally depending on the context and company policies. The primary types of informal reports include meeting minutes, expense reports, status updates, trip or conference summaries, and proposals or feasibility studies. Each serves a specific informational or analytical purpose, reflecting the immediate needs and operational contexts of the business. The format of delivery—whether through memos, emails, digital posts, or letters—depends on the intended audience and institutional practices.

Writing informal reports involves three crucial steps: planning, writing, and revising. In the planning phase, understanding the report's purpose is essential, influencing the extent and type of research conducted. The writing phase should emphasize clarity and brevity, aligning with the organization's style guidelines and ensuring the content is accessible and relevant to the intended audience. The revision step is vital for refining the content and ensuring it accurately addresses the report's objectives. When organizing a report, it's crucial to tailor the

structure based on the anticipated reaction of the audience, placing conclusions and recommendations early for positive reactions or later for negative reactions to facilitate better understanding and acceptance.

## **Formal Reports**

Formal reports in business settings differ significantly from informal reports due to their detailed and structured nature. These reports are essential across various stages of a career and can be informational or analytical, addressing internal or external audiences. Key types of formal reports include research reports, proposals, feasibility reports, and business plans, each serving distinct purposes from providing detailed data to proposing solutions to business problems. Formal reports typically include multiple components such as an executive summary, tables of contents, and appendices, which help in organizing the information comprehensively. The selection of the format and delivery method, whether digital or print, plays an important role in ensuring the report is accessible and understandable to its intended audience.

Using the 3-step process of planning, writing, and revising also applied to formal reports. These reports are not just a compilation of data but a synthesis that aids decision-making and strategy development in business contexts. Each section, from the introduction to the appendices, is crafted to support the report's objective, making it a fundamental tool in professional communication and strategic business operations.

# Key Terms

## **3-step writing process**

planning, writing, and revising

## **back matter**

also called appendices, sections that appear after the main body of the document and may include supplementary materials that support and enhance the main text, such as references, glossaries, indexes, and data sets

## **abstract**

common in academic papers and technical articles, a very short summary to help readers quickly assess the relevance of the full document to their needs

**analytical report**

report where information has been researched, collected, then analyzed, leading to one or more recommendations

**direct stakeholder**

those initially impacted by what you write

**executive summary**

summarizes all the materials that follow in the report, written to help decision-makers quickly understand the document's purpose and key findings without reading the entire content

**formal report**

usually longer and more structured than informal report

**formal report sections**

front part includes sections that come prior to the report itself to establish various items such as the authority of the report and the intended audience; the body of the report has many sections of key information and possible analysis; the back matter contains sections of material that support the body

**heading styles**

settings in computer applications for headings in a document that help organize content, enhance readability, and ensure accessibility

**indirect stakeholders**

those that are not impacted by what you write until a later time

**informal report**

usually shorter and less structured than formal report

**informational report**

provides a summary of information and data found on a particular topic

**remote stakeholders**

those who are not affected by what you write until far into the future

**theme**

in the context of a formal report, a consistent design or visual style that aligns with the subject or purpose of the report

**transmittal letter**

sent to the company or business leader who requested the report

**stakeholder**

also called interested party, anyone who will be affected by the contents of what you write