

Institute of  
Certified Secretaries



*'The Governance Profession'*

# WEBINAR

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## Session: REPORT WRITING

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FACILITATION

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**INSTITUTE OF CERTIFIED SECRETARIES**



# 1. Purpose of the Session

- To discuss the concept of Reports prepared at the work place for the purpose of the business of the organization and its various organs.

## **2. Reports at the Work Place: Internal**

- These are produced either as part of one's role (eg management accounts) or arising from specific request (eg risk analysis to support a decision).
- The consumers of such reports are within the organization. Someone must nevertheless take responsibility to oversee the implementation of the intended action.
- By their very nature, they tend to be short, sometimes released in the form of an internal Memo or a Letter. This format is particularly useful when a large amount of information or large report is to be summarized for a meeting to consider.



### 3. Reports at the Work Place: Internal-Cont'd

- In order to overcome challenges in organizing your thought process on paper:
  - ✓ Take a few moments to identify your points in the order in which they come to mind. Then determine how they should flow.
  - ✓ Start your writing with a strong opening statement. Eg The Organization stands to gain tenfold by using the new system of financial reporting....”.
- This helps to create interest from the consumer by wanting to learn how this tenfold benefit will accrue, ie begin by magnetizing the consumer.

## 4. Reports at the Work Place: Internal-Cont'd

- In the body of the report, highlight any data or findings that support the conclusion you are making. Eg “Our marketing staff found that majority of our new customers in the last five years or so came to know about the Organization through contact with our existing customers”.
- The above highlight can then lead to a conclusion that “The Organization should therefore consider allocating at least 5% of its budget for CSR and customer loyalty programmes”.
- The whole purpose should demonstrate that genuine effort was put into preparing the report with valuable outcomes.

## 5. Reports at the Work Place: External

- External reports are consumed by both internal and external audience, but designed to meet the expectations of the external audience.
- Key thing to remember is that the meaning intended may be misunderstood or misinterpreted to the detriment of the organization.
- For this reason, external reports must get approval of an authority in the organization which can take responsibility for a possible negative outcome and work to remedy it.

## **6. Reports at the Work Place: External-Cont'd**

- **External report should take a standard format which reflects the desired image of the organization. For example, such small things as the type and size of the font adopted by the organization matter, issues about spellings and overall grammar, etc.**
- **It helps to share your draft with a colleague, particularly when a sensitive matter or potentially controversial one is being addressed before submission for release.**



## 7. Periodic Reports

- Among periodic reports found at the work place are:
- Quarterly financial reports. Part of operational reports but tend to stand out on its own as a key report to the Governing Authority.
- Implementation reports which may be arising from the Strategic Plan or operational reports, eg quarterly.
- Various academic reports, in the case of Universities.
- Annual performance contracts, etc.
- These may be annual, semi-annual, quarterly, monthly, weekly, or any agreed regular interval.

## 8. Periodic Reports-Cont'd

- Some of these periodic reports could be structured around agreed templates. This ensures that information considered as key is not missed in the report.
- However, use templates carefully. Sometimes people forget to change the date or some figures used in a previous report when they use such previous reports to update the current one.
- People charged with preparation of such reports must not handle them casually. They require as much commitment and attention as a fresh report.

## 9. Interpretative Report

- It is a report which helps the user to understand the meaning in the facts included in the report. For example, if a report states that “ten students have not satisfied the examiner for the award of a degree”, interpretative report will help the user to understand what this means.
- The report provides information along with an explanation of the meaning and its implications. Eg. “The introduction of a duplex printer will help save printing costs”. One should add an explanation on what a duplex printer is or what it does, ie enables printing on both sides of a paper simultaneously.

## 10. Analytical Report

- This report starts from, say undertaking collection of data to produce information, the data is analyzed leading to one or more recommendations. For example, if the Organization wants to open a branch in one of the neighbouring towns, information about location, population, existence of similar businesses etc must first be collected and analyzed to support the decision.
- The report lays down the justification for recommending action in a particular direction.

# 11. Proposal Report

- This is basically a problem-solving report. For example, when people write a proposal to obtain funding, say for research, they would eventually be trying to demonstrate that they can get a solution to a problem.
- It is also used to secure an assignment when one responds to “Requests for Proposal” (RFP). For example, a RFP will try to specify a need to which the potential service provider will prepare proposal report showing how they can meet that need.
- The key in this report is to demonstrate that you understand the issue and how to develop a solution.

## 12. Use of Diagrams in Reports

- Diagrams, graphs or charts help the user to understand complex data.
- They are useful for Board presentation because of the diversity of skills of members. For example, some of them may have dealt with anything “mathematical” when they were last in high school.
- It also helps to cement a “picture” of the issue being reported in the mind of the user.
- However, avoid over-decorating the diagrams, charts or graphs.

## 13. Functional Reports

- A large variety of reports can actually be classified as functional. They give information related to a particular function in the organization, eg HR, finance, marketing, academic, etc.
- Indeed, whether these reports be technical, analytical, periodic or interpretative; they can still be classified under functional because the function results in a need for a report.

## 14. The Length of a Report

- The length of report may help or hinder the applicability of the report.
- Remember this: Users may not have the same amount of time nor the resources to read the report as the author would have to prepare the report. For example, a member of the Board may also be a CEO or Manager somewhere else or serves in other boards.
- If you are dealing with a long report, help the Board to focus on the key issues by giving them a summary in a separate write-up. Take them to what you want and get back with a brief explanation.
- There are probably no such challenges with short reports.



## 15. Main Elements of a Standard Report

- **Title.** Usually on the cover page. Includes date and author.
- **Summary.** For a long report. Summarizes the key findings and conclusions.
- **Introduction.** An explanation of the issue/problem at hand/main purpose of the report.
- **Body.** The largest section of the report. Carries the message of the report. Broken into paragraphs, sub-paragraphs, numberings, etc.
- **Conclusion.** An expression of final thoughts on the matter. Connects everything together.
- **Recommendations.** So what next after all these? The author's opinion comes in here.

## **16. Finally.....**

- **There ought to be someone to coordinate the collection of reports for timely submission to the user.**
- **The people involved in the preparation of the reports should be alive to the key dates, ie when such reports must be ready for submission to the coordinator and user.**
- **What is required here is co-operation and co-operation.**

**Thank You**

