



Writing Reports



AIMS

To learn how to: structure reports; separate facts and opinions; give findings, recommendations and examples; use connectors

To practise: writing a report on online trade finance

Lead in




- Do you have to read reports or long documents? Are they usually well written?
- What kind of reports or long documents do you have to write?
- Who do you write them for? How does this affect their content and the style?



Discussion



In which order would the following parts normally come in a long report?

- ☐ Appendix or appendices: for tables, figures, etc.
 - ☐ Conclusions: based on the facts and alternatives
 - ☐ Contents list: including headings and sub-headings with page numbers
 - ☐ Introduction: stating the report's aims or objectives, or its terms of reference (why it was written and who it was written for)
 - ☐ Recommendations: the action the writer thinks should be taken based on the facts, discussion and conclusions
 - ☐ Summary: giving the main points, such as important conclusions
 - ☐ The main part of the report: giving and discussing the facts and findings, and perhaps considering alternative courses of action
 - ☐ Title page: giving the subject, the writer's name, the date and (if necessary) a reference number
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Reading: Facts and opinions

- 1 Read the extract from a report written by the Head of Retail Operations of MGS Bank about the future of their branches [see Unit 3] and decide whether the statements (1–11) on page 68 are facts or opinions.



A market research survey of over 2,700 customers conducted for one of our competitors showed that 52% of them prefer using a bank branch to using the telephone or the internet. It also showed that 45% of customers in the richer AB social group – the customers I feel we should be particularly interested in – also preferred to use bank branches. I believe this is also true of younger customers, the ones you'd expect to use the internet.

I have the feeling that younger



customers are also more likely to be responsive to the design of the branches, so I think we should test sample designs with younger customers.

Research has demonstrated that well-designed branches attract more customers, who then buy more banking products, but location and staffing are also important. It seems to me that opening new branches in shopping centres would soon become profitable, despite the high rents.

Some of our competitors now have

coffee shops in the bank; this is something we should copy, in my view. Having friendly staff behind the counter is also extremely important, and I'm inclined to think that a small percentage of our staff need some training in this respect.

We also have a lot of data revealing that our customers – though not our staff – want us to open longer hours, until 6 pm from Monday to Friday, and on Saturday mornings. We will have to start negotiating with the staff about this.

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- 1 A majority of retail bank customers prefer to use a bank branch.
 - 2 Forty-five per cent of more wealthy customers prefer to use bank branches.
 - 3 MGS Bank should be more interested in customers in the AB social group.
 - 4 Younger customers also prefer going to branches to using the internet.
 - 5 Younger customers are more responsive to bank design.
 - 6 MGS Bank should test sample designs with younger customers.
 - 7 Well-designed branches attract more customers, who buy more products.
 - 8 It could be profitable to open branches in shopping centres.
 - 9 MGS Bank should open small coffee shops in its branches.
 - 10 Some of MGS Bank's staff require training in being friendly to customers.
 - 11 Customers want MGS Bank to extend its opening hours.



2 Now read the text again and underline the words used to give opinions.





Useful phrases

To give recommendations, rather than opinions, we use phrases introducing actions.

We should ...

We ought to ...

We must ...

(stronger than *should* or *ought to*)

I strongly recommend ...


It would be advisable to ...

(impersonal; it's not you advising it)





Linking words



When writing a report it is important to connect your ideas logically and effectively, but without always using the same words and phrases. Match the groups of conjunctions and connectors (1–8) to their uses (a–f). Some uses can be matched to more than one group.

1 for example, for instance, such as

We need to find out what new facilities the back office staff would like, *such as* computer upgrades, on-site parking facilities.



2 also, furthermore, moreover

When writing a report you should separate facts and opinions. *Furthermore*, you should make sure your opinions are supported by your findings.


3 in other words, i.e.




This applies to a lot of customers in the AB social group, *i.e.* customers with higher incomes who the bank is particularly interested in.



- 4 **because, since, as** (followed by a clause with a subject and a verb)
Some customers don't bank online *as* they are worried about security.
 - 5 **because of, due to, owing to** (followed by a noun or noun phrase)
Our profits fell *due to* increased competition.
 - 6 **consequently, therefore, thus, as a result**
Some customers are worried about internet security. *Consequently*, they don't want to do online banking.
 - 7 **though, although, even though, while**
(used in either the first or second clause of a contrast)
Even though rents are high, branches in shopping centres are profitable.
Branches in shopping centres are profitable *even though* rents are high.
 - 8 **however, on the other hand, yet, on the contrary**
(used in the second clause or sentence of a contrast)
Branches in shopping centres are expensive. *Yet* they attract a lot of customers.
Renting property in shopping centres isn't cheap. *On the contrary*, it's extremely expensive.
- a To clarify (to express something already said or written in different words)
 - b To express consequences
 - c To express contrast
 - d To express reasons and causes
 - e To give a second or third argument or example
 - f To give an example of something that has just been mentioned



Reading: Head office relocation



Metropolis Bank is a large American full service bank, formed from the merger of a commercial bank with an investment bank, a private bank and an insurance company. It is moving all its departments, which are currently in a number of different locations in New York City, to a new corporate headquarters in the financial district in downtown Manhattan.

Eight thousand staff will be relocated to a new, 40-storey high-rise building, which is currently being designed. The bank has circulated a questionnaire asking staff about what facilities they would like in the new building (without, of course, guaranteeing that all choices and requests can be accommodated).



The questionnaire included the following questions:



STAFF
Questionnaire

Eating

- Do you prefer to eat out at lunchtime or stay in?
- Do you normally eat lunch with colleagues or alone?
- If eating in, what style of facility would you prefer in the new building – cafeteria, restaurant, snack bar, sandwich shop, coffee shops?
- Would you bring your own lunch? Hot or cold? What kind of facilities would you require in the new building for storing and consuming food?

▶ ***Exercise***

- Would you use on-site leisure facilities, such as a gym, an exercise class, and squash or basketball courts?

▶ ***Health care***

- Would you use an on-site doctor or dentist?
- Would you need travel advice and inoculations?


▶ ***Travel to work***

- Do you need motorbike or cycle parking, and changing facilities? (Car parking is unfortunately not an option.)



There was also space for raising concerns, making requests and expressing other preferences.



Discussion

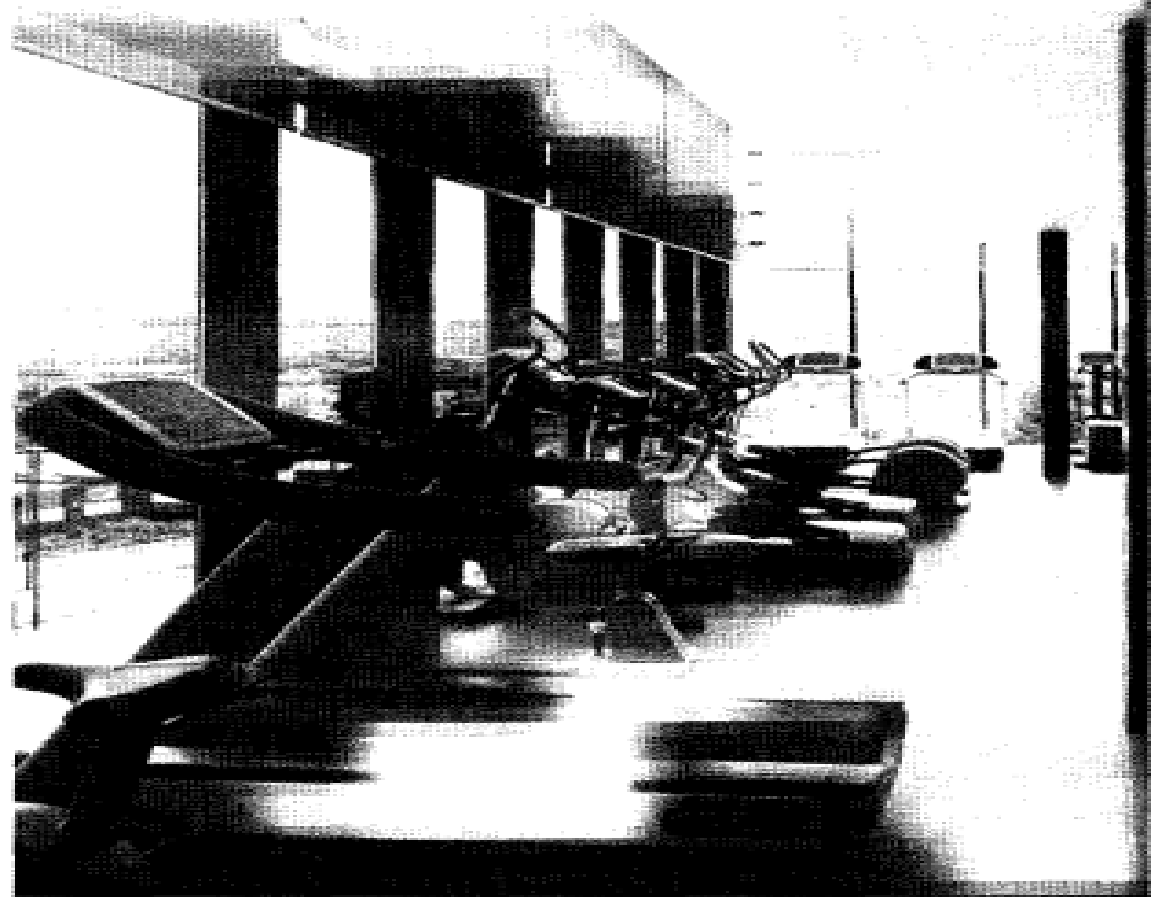
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- If you worked for this bank, how would you answer the questionnaire?
 - How do the proposed facilities compare with the ones you have where you work or study?
 - Is there anything else you would expect the bank to propose?
 - Do you, or would you like to, work in a large or a small organization? In a large headquarters or a small department? What are the advantages and disadvantages of each?

Look at the following two documents and answer the questions:

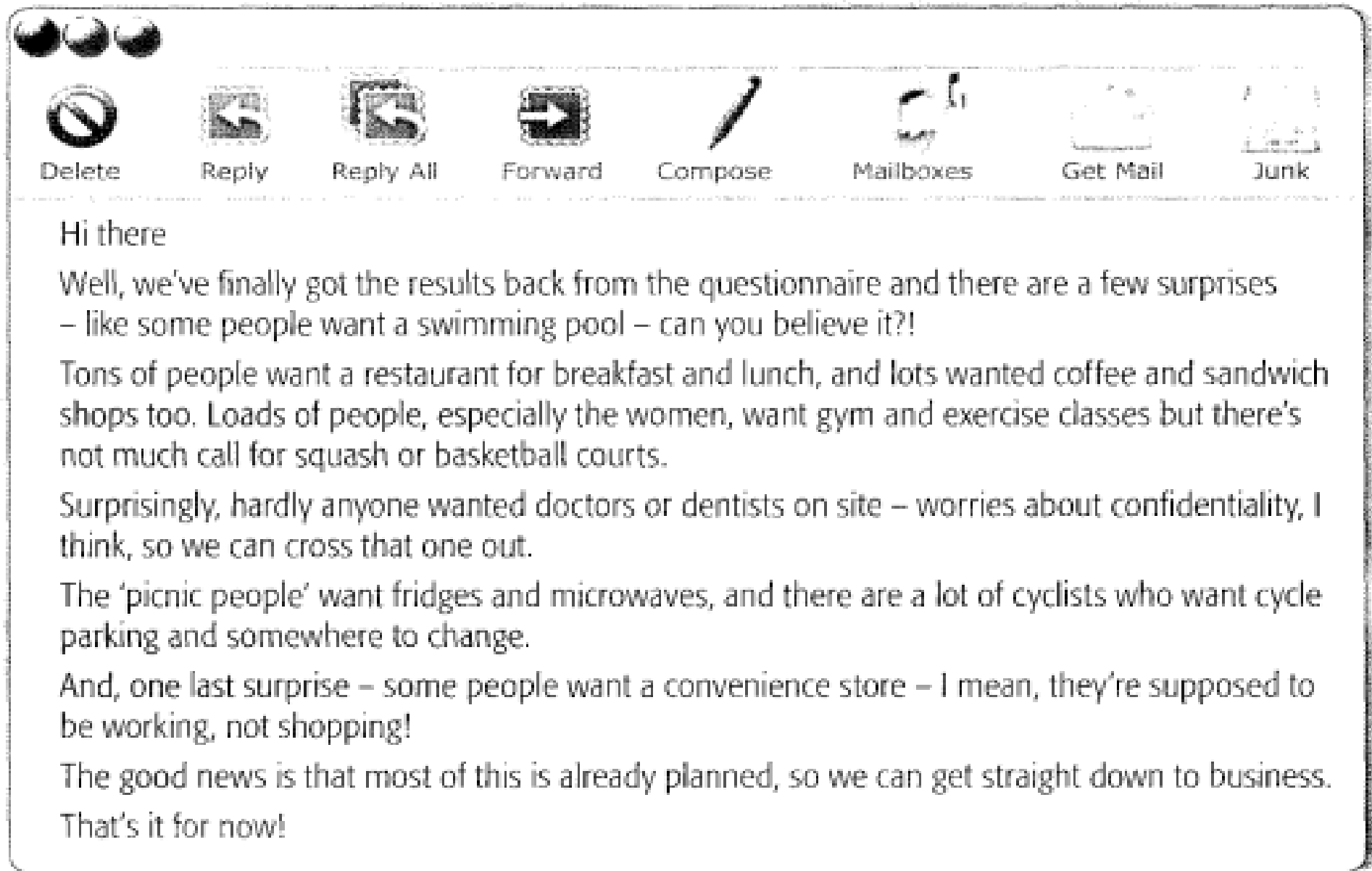
- 1 Who do you think they were written for?
 - 2 What kind of language are they written in?
 - 3 What elements do they contain that you would not use in a report for senior management?
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Next summer Metropolis Bank is moving to a new 40-storey headquarters building in the Financial District, designed by award-winning architects Godwin-Malone.

The breathtaking 700-foot tower, built with all the latest cutting-edge technology, has four basement levels and 40 floors providing over a million square feet of office space. The building consists of 13,500 tons of steel, 175,000 tons of concrete, and 450,900 square feet of glass. It will provide a state-of-the-art working environment for 8,000 employees. Facilities for staff will include an 850-seat staff restaurant – one of the largest of its kind in the world – that will serve over 2,500 meals a day. The basement levels will include a fully equipped multi-purpose gymnasium with high-tech cardio and weight-training machines, and rooms for a full range of exercise classes (aerobics, yoga and Pilates). Staff will be offered personal training programs according to their individual needs, designed by top-notch qualified trainers.



b



Writing 3

Write a complete report, to be submitted to the Board of Directors, containing a summary of the questionnaire responses (but also taking into account what has already been planned), as well as recommendations as to which facilities to provide in the new building.

The list of questions in the Reading activity (or a copy of the actual questionnaire) would usually be included as an Appendix.

Remember that even a well-written report will look bad if it has a bad layout.

Some basic recommendations:

- Use clear headings and sub-headings.
- Use the same spacing throughout the document.
- Use only one font, or two at the most, with bold font for emphasis.
- Write in short and focused sections.

As examples, look at the documents included in companies' published Annual Reports.