

15

Informal Reports



LEARNING OBJECTIVES FOR THIS CHAPTER

- Define and understand the role of informal reports
- Identify the difference between informational and analytical reports
- Plan and write effective informational reports
- Plan and write effective analytical reports

CHAPTER OUTLINE

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LET'S GET STARTED

Informal Reports

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You have probably written a short informal report at one time or another (at school, for an internship, or on the job). Make some notes about that situation, and then think about a different real-life situation for which you might need to write a short informal report. For instance, you may need to write a short progress report for your employer about what you accomplished this week. Or you may want to write a feasibility report addressed to your instructor, explaining and justifying the final project you propose to do for class. Use a memo format to write your short report.

Questions to ask about the short report you wrote as you review the material in this chapter:

- ▶ Is the purpose of the report clear (status update, recommendation, other)?
- ▶ Have I used headings and bullets, and, if so, are these used appropriately?
- ▶ Is the tone of my short report personal enough yet professional?
- ▶ Is the report's length appropriate?
- ▶ Is the subject line clear?

At the end of this chapter, review your initial Let's Get Started report with your instructor or with a group of students to see how much you might change or modify the report based on what you have learned from the chapter.

Definition of informal reports

When you think of reports, you probably picture long, formal documents that contain many pages of research, information, charts and graphs, footnotes, and other details. Yet in the workplace, for every long, formal report dozens of shorter reports are written, reports focused on only one or two very specific issues. These *informal reports* help people make informed decisions on matters such as the most comfortable office chairs to buy or the best recruit to hire for management training. Unlike long formal reports (discussed in Chapter 16), most informal reports require no extended planning, are prepared quickly, contain little or no background information, and have no *front* or *end matter* (title page, table of contents, glossary, works cited, index).

Despite being so focused and concise, informal reports do provide the information and analysis that readers need every day on the job. Although various formats can be used, informal reports, especially those intended for internal audiences, most often take the form of a memo. (Depending on the company or organization, the words “memo” or “memorandum” may or may not be used, but a general memo format is followed.) Because informal reports are typically longer than what would be suitable for the body of an email message, these reports are usually sent as attachments. Informal reports are typically written using a word processing program (like Microsoft Word, Apple Pages, or Google Docs), but the final version should be saved as a PDF file to retain formatting and page breaks. PDF files can be read on a computer or mobile device or printed and read on paper.

Format of informal reports

TWO CATEGORIES OF REPORTS: INFORMATIONAL AND ANALYTICAL

In the professional world, decision makers rely on two types of informal reports: Some reports focus primarily on information (“what we’re doing now,” “what we did last month,” “what our customer survey found,” “what went on at the department meeting”), while others may also include analysis (“what this information means for us,” “what courses of action should be considered,” “what we recommend, and why”).

Informational versus analytical reports

The purpose of an *informational report* is to inform; that is, to provide data and other information to answer basic questions, such as how much progress has been made on a project (progress reports), what activity has taken place over the course of a certain period of time (activity reports), what activity occurred during a business trip (trip reports), or what discussions took place in a meeting (meeting minutes). These reports help keep an organization running from day to day by providing short, timely updates on important activities.

Purpose of informational reports

Unlike informational reports, *analytical reports* offer both information and conclusions based on the information. Analysis is the heart of technical communication. Analysis involves evaluating information, interpreting it accurately, drawing valid conclusions, and making persuasive recommendations. Although gathering and reporting information are essential workplace skills, analysis is ultimately what professionals do to earn their pay. Analytical reports analyze and evaluate whether a project or situation is feasible (feasibility reports), make recommendations on how to proceed (recommendation reports), or constructively critique the work of others (peer review reports).

Purpose of analytical reports

PROGRESS REPORTS (INFORMATIONAL)

Organizations depend on *progress reports* (also called status reports) to monitor progress and problems on various projects. Progress reports may be written either for internal personnel or outside clients. In the case of internal audiences,

Purpose, audience, and frequency of progress reports

managers use progress reports to evaluate projects, monitor employees, decide how to allocate funds, and keep track of delays or expense overages that could dramatically affect outcomes and project costs. In the case of external audiences, progress reports explain to clients how time and money are being spent and how difficulties have been overcome. The reports can therefore be used to assure the client that the project will be completed on schedule and on budget.

Many contracts stipulate the dates and stages when progress will be reported. Failing to report on time may invoke contractual penalties. Some organizations require regular progress reports (daily, weekly, monthly), while others use such reports only as needed, such as when a project milestone has been reached.

Elements of progress reports

Figure 15.1 shows a progress report from a training manager to a company vice president. Because the audience is internal, the writer has chosen memo format. A report like this to an external client might be written in letter format and on company letterhead as a legal record. Notice also how the report provides only those details essential to the reader. In addition, it follows a timeline structure, beginning with a summary of progress on the project (or since the last progress report) and concluding with the next steps to be completed. The text of this report (without the heading guide, company logo, and copy notation) also appears on pages 88–89.



STRATEGIES for Progress Reports

- ▶ **Choose an appropriate format.** Routine, regular reports may be delivered in email format, whereas more infrequent reports might be better delivered via a signed memo (or a letter, when the report is for an external client).
- ▶ **Provide a clear subject line.** All progress reports should clearly identify their purpose in the subject line of a memo or email or in the introduction to a letter.
- ▶ **Present information efficiently.** Because readers of progress reports are managers or clients who want the bottom-line information as quickly as possible, chunk the information into logically headed sections and use bulleted or numbered lists. Leave out information readers will already know, but do not omit new information.
- ▶ **Make sure your report answers the anticipated questions.** First identify what has been accomplished since the last report; then discuss any important details such as outcomes of meetings, problems encountered and solutions implemented or proposed, deadlines met or missed, resources/materials needed, and so on. Conclude with steps to be completed in time for the next report, with specific dates, if available.

FIGURE 15.1
A progress report

BETA National

To: P. J. Stone, Senior Vice President
 From: B. Poret, Group Training Manager *B.P.*
 Date: June 6, 20XX
 Subject: *Progress Report: Equipment for New Operations Building*

Work Completed

Our training group has met twice since our May 12 report. In our first meeting, we identified the types of training we anticipate.

Types of Training Anticipated

- Loan Officer Work Experience
- Divisional Systems Training
- Divisional Clerical Training (Continuing)
- Divisional Clerical Training (New Employees)
- Divisional Management Training (Seminars)
- Special/New Equipment Training

In our second meeting, we considered various areas for the training room.

Training Room Assignment and Equipment

The frequency of training necessitates having a training room available daily. The large training room in the Corporate Education area (10th floor) would be ideal. Please confirm that this room can be assigned to us on a full-time basis.

To support the training programs, we purchased this equipment:

- Audioviewer
- Large flat screen monitor
- Digital video camera and tripod
- Software for computer-assisted instruction

This equipment will allow us to administer training in varied modes, ranging from programmed and learner-controlled instruction to seminars and workshops.

Work Remaining

To support the training, we need to furnish the room appropriately. Because the types of training will vary, the furniture should provide a flexible environment. Outlined here are our anticipated furnishing needs.

- Tables and chairs that can be set up in many configurations. These would allow for individual or group training and large seminars.
- Portable room dividers. These would provide study space for training with programmed instruction, and allow for simultaneous training.
- Built-in storage space for audiovisual equipment as well as training supplies. This storage space should be multipurpose, providing work or display surfaces.
- A flexible lighting system, for audiovisual presentations and individualized study.

The project is on schedule. As soon as we receive your approval of these specifications, we will send out bids for room dividers and have plans drawn for built-in storage.

← Subject line identifies exact purpose of the report

← Summarizes first achievement

← Summarizes second achievement

← Describes work remaining

← Bulleted list breaks up dense information

← Concludes with request for approval of next phase

The next example (Figure 15.2) is a progress report written by a student. As you work on a longer report or term project, your instructor might require a progress report. In this example, the student writer documents the progress she has made on her term project: a causal analysis examining the impact of a recently formed town committee.

<u>PROGRESS REPORT</u>	
TO:	Dr. J. Lannon
FROM:	T. Fitzgerald, Student <i>T.F.</i>
DATE:	April 27, 20XX
SUBJECT:	Analytical Report
	A STUDY OF THE IMPACT OF THE SANDWICH HISTORIC DISTRICT COMMITTEE ON THE TOWN'S ARCHITECTURAL CHARACTER
WORK COMPLETED TO DATE	
March 22:	Completed report on Sandwich Historic District Committee.
April 11:	Obtained maps of Sandwich, legislation, certificates of appropriateness, exemption, and appeals from Town Hall.
April 12, 14, 15:	Investigated district area by car, noted differences in historic and nonhistoric areas.
April 18:	Photographed sampling of areas in district. Twenty photos taken, fifteen returned by developer.
April 19:	Divided master map into sections, redefining district.
April 20:	Completed tentative outline.
April 22:	Interviewed chairman of Committee, Donald Bourne. Received new set of rules and regulations for district.
WORK IN PROGRESS: Drawing maps of present district and redefined area.	
WORK TO BE COMPLETED	
April 28:	Interview Edward Cain, committee member.
May 2:	Interview Gary Sosa committee member.
DATE FOR COMPLETION: May 11, 20XX	

FIGURE 15.2 Progress report on a term project

PERIODIC ACTIVITY REPORTS (INFORMATIONAL)

Periodic activity reports resemble progress reports in that they summarize activities over a specified period. But unlike progress reports, which summarize specific accomplishments on a particular project, periodic activity reports summarize general activities during a particular period. Periodic activity reports are almost always internal, written by employees to keep their supervisors up to date on their activities as a whole in order to help managers monitor workload. In many companies, these reports, usually written weekly or monthly, are called “status reports.”

Figure 15.3 shows a periodic activity report, in the form of a weekly status report. Notice how Laura Hardin presents the most vital information first (the ongoing user manuals project) and ends with necessary but less pressing details (vacation time and “other”). The report contains only the information and level of detail her supervisor needs.

Purpose, audience, and frequency of periodic activity reports

Elements of periodic activity reports



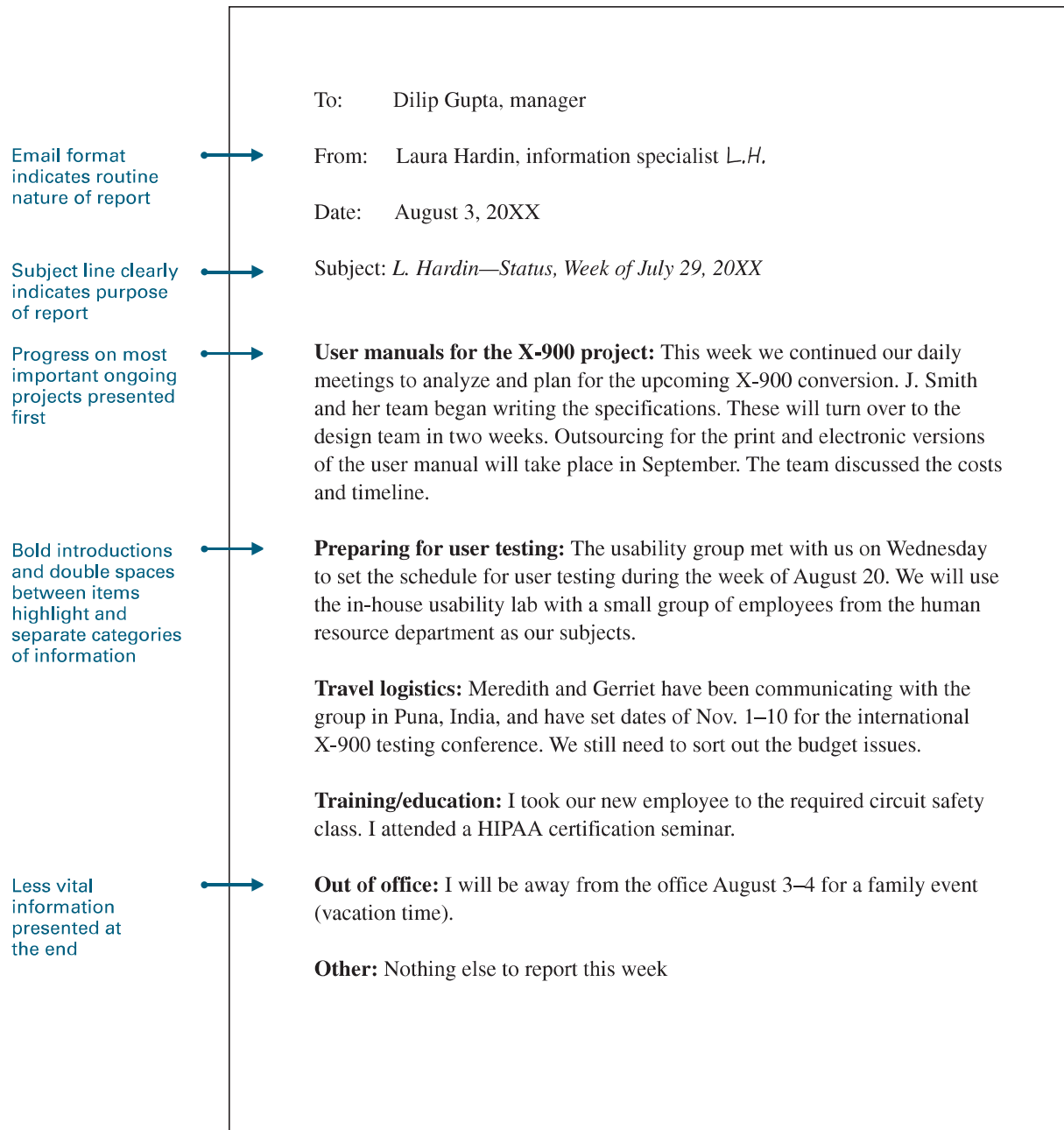
STRATEGIES for Periodic Activity Reports

- ▶ **Choose an appropriate format.** Periodic activity reports are usually written in email or memo format to a supervisor. However, some organizations may require a predesigned form.
- ▶ **Provide a clear subject line.** As with any report, identify the exact purpose of a periodic activity report by providing a subject line, such as “Monthly activity report for August.”
- ▶ **Present information efficiently.** All report readers want the bottom line. Omit minor details but include all the essentials. Use headers to chunk information and bulleted and numbered lists to break up dense prose for easier reading.
- ▶ **Make sure your report answers the expected questions.** Begin by describing your most important accomplishments during the period (such as progress on an ongoing project). Then describe any other relevant activity since the last report (such as completion of one-time projects, attendance at meetings, supplies needed, conflicts or problems encountered, schedule changes, vacation time taken or upcoming, and so forth).

TRIP REPORTS (INFORMATIONAL)

Trip reports resemble periodic activity reports in that they detail activities during a given period, but they focus specifically on business-related travel rather than a variety of workplace activities. These reports, like periodic activity reports,

Purpose and audience of trip reports

**FIGURE 15.3** A periodic activity report

are written to help a supervisor monitor employee activities. In the case of trip reports, when employers pay for employee travel, managers need to know that the company is getting its money's worth. Managers also need to know what employees learn through their travels.

Figure 15.4 shows a trip report written by an employee who has traveled to a branch office to inspect the site and interview those employees about absenteeism and hiring problems at that branch. Because the report is informational, not analytical, it sticks only to the facts. Note also that Bill Moskowicz begins the report with a purpose statement, accounts for how he spent his time, identifies the people with whom he met, offers a summary of what he learned, and provides a conclusion.

For more on trip reports, see the Strategies below.

Elements of
trip reports



STRATEGIES for Trip Reports

- ▶ **Take good notes and make accurate transcriptions of interviews.** If you must interview people, either ask their permission to record the conversation or take careful notes. Transcribe interviews immediately, while the discussion is still fresh in your mind. If you investigate a location or site, take careful notes of what you observe.
- ▶ **Write down the names of people and places.** Make sure you are able to indicate whom you spoke with (spelling their names correctly and getting their job titles right) and the names of places visited.
- ▶ **Account for times and locations.** Demonstrate a good use of your time by accounting for it (but not exhaustively). If you visit more than one location, be clear about what occurred at each.
- ▶ **Provide a clear title and purpose statement.** A clear title indicates exactly which trip you are referring to, including date(s), while a purpose statement at the beginning of the report prevents any possible confusion as to your reasons for taking the trip.
- ▶ **Use a format that is easy to navigate.** As you would in any report, provide clear headings to break up chunks of information and use bulleted/numbered lists, double spacing, and so on, for ease of readability.
- ▶ **Describe findings completely and objectively.** Don't omit vital information or include irrelevant information, and don't insert personal impressions—stick to the facts.
- ▶ **Offer to follow up.** Because trip reports may lead to further questions from a supervisor, indicate that you are available to help answer those questions. Unless you have been asked to do so, do not make recommendations.

FIGURE 15.4
A trip report

Subject line identifies trip and date

Starts with a purpose statement

Provides an accounting of how time was spent

Includes discussion of what was learned

Uses bulleted list (and headings) to break up text and identify key points

To: Monica Herrera, Director of Human Resources, Boston office
From: Bill Moskowitz, Human Resources Specialist *B. M.*
Date: March 30, 20XX
Subject: *Visit to the Eastfield Office*

PURPOSE

On March 20, I visited the Eastfield office to explore these two issues:

- Higher-than-average rate of employee absenteeism at that office
- Difficulties hiring qualified employees to work and live in or near the Eastfield Fort Channel area

To pinpoint the causes of these problems, I decided to interview three individuals face to face in hopes of getting more candid and detailed responses than I would via phone or email, particularly regarding the sensitive absenteeism problem.

SCHEDULE

I spoke with the following people individually: Susan Sheehan, Director of HR (9:00 a.m.–10:00 a.m.); Sammy Lee, Marketing Manager for the gourmet desserts division (10:00 a.m.–11:00 a.m.); and Megan Fields, an Administrative Assistant in the distribution division (11:00 a.m.–12:00 p.m.). Then we all had lunch and continued the discussion between noon and 2:00 p.m., at which time I transcribed my recordings and headed back to Boston.

INTERVIEWS

The interviews were illuminating. Essentially all three pointed out how the absenteeism and hiring problems are not entirely separate issues; in fact, they are closely linked. While once a thriving, safe, and low-crime city (including the branch's Fort Channel area), Eastfield has now fallen upon difficult economic times, particularly in the last year. All three employees identified the following problems:

- Increased gang activity and vagrancy in the Fort Channel area
- Lack of safe public transportation to and from the office or a secure, on-site parking facility

FIGURE 15.4
(Continued)

- An increasing decline in amenities, especially lunch venues or safe public areas nearby
- Decreased security resulting from a busy police force and high security guard turnover

While Susan and Sammy can both afford to occasionally take cabs and leave the Fort Channel area for lunch, Megan pointed out her limitations due to salary and an insufficient reimbursement program.

The Fort Channel area's problems have all had a direct impact on employee hiring in recent months. Both Susan and Sammy reported losing promising potential employees following interviews. According to Susan, while United Foods manufactures and distributes gourmet products, attracting those who wish to work in an upscale environment, potential employees are often frightened away, preferring employment at either the Boston office or with competitors located elsewhere in the state. At the same time, very few have opted to relocate from the Boston to Eastfield offices to help account for imbalances.

CONCLUSION

While the goal of this trip was not for me to make recommendations, I have some specific ideas. I would be glad to speak with you further to answer any questions and to share those ideas with you.

← Provides an offer to follow up

Purpose, audience,
and distribution of
meeting minutes

MEETING MINUTES (INFORMATIONAL)

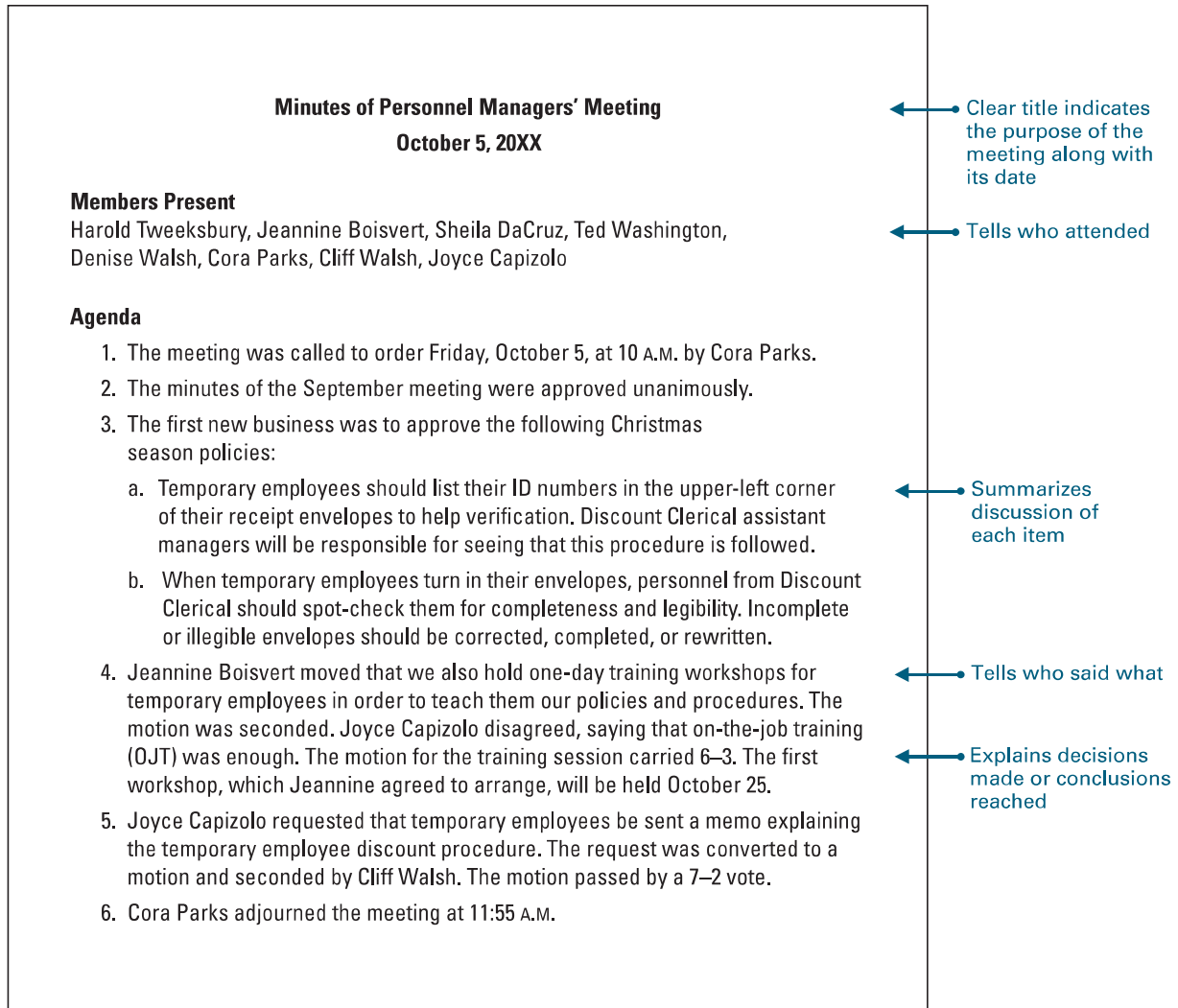
Many team or project meetings require someone to record the proceedings. *Meeting minutes* are the records of such meetings. Copies of minutes usually are distributed (often via email) to all members and interested parties to track the proceedings and to remind members about their responsibilities. Usually one person is appointed to record the minutes. Often, the person assigned will type minutes on a laptop computer and email them out as soon as the meeting is completed. Be sure to proofread the minutes, check the spelling of the attendees' names, and consider how you have described any politically sensitive or confidential issues before sending. Remember, email can travel widely.

Figure 15.5 shows minutes from a personnel manager's meeting.



STRATEGIES for Meeting Minutes

- ▶ **Take good notes during the meeting.** Don't rely on your memory, even if you write up the minutes immediately after the meeting. Write down who said what, especially if a particularly important point was raised.
- ▶ **Complete the minutes immediately after the meeting.** Even if you take good notes, you may forget the context of a particular point if you wait too long. Write up the minutes immediately.
- ▶ **Include a clear title with the meeting date.** A clear title should indicate the meeting's exact purpose ("sales conference planning meeting"), and always include the meeting date to prevent confusion with similar meetings.
- ▶ **List attendees.** List everyone who attended. If the meeting was chaired or moderated, indicate by whom.
- ▶ **Describe all agenda items.** Make sure all topics discussed are recorded. Your own memory of meeting topics and those of other meeting attendees are usually fleeting.
- ▶ **Record all decisions or conclusions.** If everyone agreed on a point or if a vote was taken, be sure to include those results in your minutes.
- ▶ **Make sure the minutes are easy to navigate.** Use headings, lists, and other helpful design features.
- ▶ **Make sure the minutes are precise and clear.** Describe each topic fully yet concisely. Don't leave out important nuances, but stick to the facts.
- ▶ **Keep personal commentary, humor, and "sidebar" comments out of meeting minutes.** Comments ("As usual, Ms. Jones disagreed with the committee") or judgmental words ("good," "poor," "irrelevant") are not appropriate.

**FIGURE 15.5** Meeting minutes

FEASIBILITY REPORTS (ANALYTICAL)

Feasibility reports are used when decision makers need to assess whether an idea, plan, or course of action is realistic and practical. Sometimes an idea may make perfect sense from one perspective, but may not be feasible at the moment for one reason or another, usually because of timing. For example, a manufacturing company may want to switch to a more automated process, which would greatly reduce costs over the long term. But in the short term, the resulting layoffs would have a negative impact on morale.

Purpose of feasibility reports

Typical questions about feasibility

A feasibility report provides answers to questions such as these:

- What is the problem or situation, and what is the best approach to solving or dealing with it?
- Is this course of action likely to succeed?
- Do the benefits outweigh the drawbacks or risks?
- What are the pros and cons, and what are the alternatives?
- Should anything be done at all? Should it wait? Is the timing right?

Audience for feasibility reports

The answers are based on the writer's careful research.

Managers and other decision makers are the primary audience for feasibility reports. These busy people want to see the recommendation or answer at or near the beginning of the document, followed by supporting evidence and reasoning. In other words, a feasibility report should use the “bottom line first” organizational pattern: here is the situation; here is our recommendation; and here is why this approach is feasible at this time.

Elements of feasibility reports

Figure 15.6 shows a feasibility report in which a securities analyst for a state pension fund reports to the fund's manager on the feasibility of investing in a rapidly growing computer maker. Notice how it starts with background, provides a direct recommendation, provides information that supports the recommendation, and ends with a call to action.



STRATEGIES for Feasibility Reports

- ▶ **Make sure the subject line is clear.** Always use the word “feasibility” (or a synonym) in the title (“Subject: Feasibility of ...”).
- ▶ **Provide background information.** Your readers may not always need background information, but if they do, make it short.
- ▶ **Offer the recommendation near the beginning of the report.** Because readers of feasibility reports are interested primarily in the “bottom line,” state it explicitly at the very beginning of the report or just after the background information.
- ▶ **Provide the details, data, and criteria after the recommendation section.** Include supporting data, such as costs, equipment needed, results expected, and so on. Don't overdo the supporting data, but include everything directly relevant that will persuade readers to support your recommendation.
- ▶ **Explain why your recommendation is the most feasible of all the possible choices.** Your readers may prefer other choices. Persuade them that yours is the best choice.
- ▶ **End with a call to action.**

State Pension Fund

MEMORANDUM

To: Mary K. White, Fund Manager

From: Martha Mooney MM

Date: April 1, 20XX

Subject: ***The Feasibility of Investing in WBM Computers, Inc.***

Our Treasury bonds, composing 3.5 percent of the Fund's investment portfolio, mature on April 15. Current inflationary pressures make fixed-income investments less attractive than equities. As you requested, I have researched and compared investment alternatives based on these criteria: market share, earnings, and dividends.

Recommendation

Given its established market share, solid earnings, and generous dividends, WBM Computers, Inc., is a sound and promising company. I recommend that we invest our maturing bond proceeds in WBM's Class A stock.

Market Share

Though only ten years old, WBM competes strongly with established computer makers. Its market share has grown steadily for the past five years. This past year, services and sales ranked 367th in the industrial United States, with orders increasing from \$750 million to \$1.25 billion. Net income places WBM 237th nationally and 13th on return to investors.

Earnings

WBM's net profit on sales is 9 percent, a roughly steady figure for the past three years. Whereas 2006 earnings were only \$.09 per share, this year's are \$1.36 per share. Included in these ten-year earnings is a two-for-one stock split issued November 2, 2010. Barring a global sales downturn WBM's outlook for continued strong earnings is promising.

Dividends

Investors are offered two types of common stock. The assigned par value of both classes is \$.50 per share. Class A stock pays an additional \$.25 per share dividend but restricts voting privileges to one vote for every ten shares held by the investor. Class B stock does not pay the extra dividend but carries full voting rights. The additional dividend from Class A shares would enhance income flow into our portfolio.

WBM shares now trade at 14 times earnings and current share price of \$56.00, a bargain in my estimation. An immediate investment would add strength and diversity to our portfolio.

← Clear subject line leaves no doubt as to purpose of report

← Gives brief background

← Makes a direct recommendation

← Explains the criteria supporting the recommendation

← Encourages reader action

FIGURE 15.6 A feasibility report

Purpose and audience of recommendation reports

Elements of recommendation reports

RECOMMENDATION REPORTS (ANALYTICAL)

While a feasibility report sets out to prove that a particular course of action is the right one to take, a *recommendation report* shortens or even skips the feasibility analysis (since it has already taken place or been discussed) and gets right to the point of making a recommendation. Recommendation reports, like feasibility reports, may include supporting data, but they also state an affirmative position (“Here’s what we should do and why”) rather than examining whether the approach will work (“Should we do it?”). Like feasibility reports, recommendation reports are for the eyes of decision makers, and these documents take a direct stance.

Figure 15.7 shows a recommendation report from a health and safety officer at an airline company to a vice president regarding the workstation comfort of the company’s reservation and booking agents. Notice that it is organized similarly to a feasibility report but takes a more authoritative stance based on previous analysis, emphasizing expected rather than possible benefits. Also, a description of the problem and its causes precedes the recommendations.

This is just one example of countless short reports used to examine a workplace problem and recommend a solution.



STRATEGIES for Recommendation Reports

- ▶ **Provide a clear subject line.** As always, make sure the subject of the report is brief and directly to the point.
- ▶ **Keep background information short.** Keep the background history brief, but do discuss how feasibility has already been determined.
- ▶ **Discuss the problem or situation prior to making recommendations.** In addition to the brief background information, outline the problem or situation that the recommended actions will resolve. Then discuss the recommendations in as much detail as necessary.
- ▶ **Use an authoritative tone.** Take a strong stance and write with confidence, knowing that the recommendation has already been determined to be feasible.
- ▶ **Use headings and make them as informative as possible.** Instead of using the vague heading “Problem,” be specific (“Causes of Agents’ Discomfort”). Don’t forget that you are writing to a “bottom line” audience.
- ▶ **End with a list of benefits for taking action.** Rather than appealing for action, assume that it will be taken by reemphasizing the benefits.



MEMORANDUM

To: R. Ames, Vice President, Personnel

From: B. Doakes, Health and Safety *B.D.*

Date: August 15, 20XX

Subject: **Recommendations for Reducing Agents' Discomfort**

In our July 20 staff meeting, we discussed physical discomfort among reservation and booking agents, who spend eight hours daily at workstations. They complain of headaches, eyestrain, blurred or double vision, backaches, and stiff joints. This report outlines the apparent causes and recommends ways of reducing discomfort.

Causes of Agents' Discomfort

Last year, we replaced all older CRT monitors with LCD screens. Ergonomics consultants have adjusted the brightness and contrast settings for each user and have advised us that the monitors themselves are not causing headaches and eyestrain. Instead, these problems seem to be caused by excessive glare from background lighting. Other concerns, such as backaches and stiffness, result from agents who are sitting in one position for up to two hours between breaks.

Recommended Changes

We can eliminate much discomfort by improving background lighting, workstation conditions, and work routines and habits.

Background Lighting. To reduce the glare on display screens, I recommend these changes in background lighting:

1. Decrease all overhead lighting by installing lower-wattage LED bulbs.
2. Keep all curtains and adjustable blinds on the south and west windows at least half-drawn to block direct sunlight.
3. Install shades to direct the overhead lighting straight downward, so that it is not reflected on the screens.

Workstation Conditions. I recommend the following changes in the workstations:

1. Reposition all screens so light sources are neither at front nor back.
2. Clean the surface of each screen weekly.
3. Adjust each screen so the top is slightly below the operator's eye level.
4. Adjust all keyboards so they are 27 inches from the floor.
5. Replace all fixed chairs with pneumatic, multi-task chairs.

<continued>

FIGURE 15.7
A recommen-
dation report

- ← Subject line directly states exact purpose of report
- ← Provides immediate orientation by giving brief background and main point
- ← Statement of problem or situation precedes recommendations
- ← Makes general recommendations
- ← Expands on each recommendation

FIGURE 15.7
(Continued)

Discusses benefits
of following the
recommendations

Work Routines and Habits. These are recommended changes in agents' work routines and habits:

1. Allow frequent rest periods (10 minutes hourly instead of 30 minutes twice daily).
2. Provide yearly eye exams for agents as part of our routine healthcare program.
3. Train agents to adjust screen contrast and brightness whenever the background lighting changes.
4. Offer workshops on improving posture.

These changes will give us time to consider more complex options such as installing hoods and antiglare filters on display screens, replacing fluorescent lighting with LED or other options, covering surfaces with nonglare paint, or other disruptive procedures.

cc: J. Bush, Medical Director
M. White, Manager of Physical Plant

PEER REVIEW REPORTS (ANALYTICAL)

Purpose and
audience of peer
review reports

Peer review reports are written between employees, providing a way for people (peers) to give each other constructive criticism and feedback. Because peer review reports are shared by colleagues wishing to preserve good workplace relationships, they must be written with tact.

Figure 15.8 illustrates the use of constructive criticism in peer review and can serve as a model for reviewing the work of other students in the classroom.



STRATEGIES for Peer Review Reports

- ▶ **Start with the positives.** Briefly state the good points of the reviewed document as a way of leading into and balancing against the criticisms.
- ▶ **Organize by topic area.** Provide separate sections for suggestions about the reviewed document's writing style, design, use of visuals, and other areas.
- ▶ **Always provide constructive criticism.** Remember that you are reviewing the work of a colleague or colleagues. Review their work tactfully, as you would want them to review your work. However, don't ignore problem areas.
- ▶ **Support your criticisms with examples and advice.** Point to particular examples in the reviewed document as you discuss them. Suggest alternatives, if possible. Point to helpful resources, if applicable.
- ▶ **Close positively.** End with a friendly, encouraging tone. If the reviewed document is particularly problematic, state as much—but diplomatically.

TO: Catie Noll, Advertising Associate
FROM: David Summer, Advertising Supervisor D.S.
DATE: May 1, 20XX
SUBJECT: Review of Your Feasibility Report for the Garvey Account

I have reviewed the first draft of your report for the Garvey account. Thank you for your good work! You have done a great job organizing the material and getting started. I would like to offer the following suggestions:

Voice: You use passive voice in a number of places where active voice would be more appropriate. For instance, at the bottom of page 7, you might want to change “A mistake was made” to “We made a mistake.” I would recommend that you review the entire draft for this usage.

Organization: As a reader, I did not know what you were recommending in this report until I reached the very end. I would suggest that you move your recommendation up to the beginning of the report, then follow it with the supporting data. Our supervisors will want to know the bottom line right away.

Research: I noticed that most of your research was based on commercial Web sites. You should probably look at more reliable peer-reviewed sources, such as well-respected business newspapers, journal articles, and online publications of professional organizations.

Visuals/font: Great use of images, especially the maps on page 9. You might want to increase the font size of the base text.

I hope my recommendations are helpful as you complete this project. Your report is well on the way, offering solid reasons that should persuade the managers to try winning the Garvey account from our competitors. Please let me know if you have any questions.

FIGURE 15.8
A peer review report

Report starts with a friendly tone and says something positive before offering suggested changes

Suggested changes are clear and organized by area

Writer provides rationale behind suggestions

Writer provides specific advice to help the writer improve the reviewed document

Report uses a polite closing



CHECKLIST for Informal Reports

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- ☐ Have I determined the right report type (status report, recommendation report, etc.) for this situation?
- ☐ When preparing a progress or status report, have I determined how much detail is necessary to include?
- ☐ When taking minutes for a meeting, have I included all the key decisions and discussion items and left out unnecessary detail?
- ☐ If I have decided to write a recommendation report, has the feasibility of the project or idea already been determined, or is a feasibility study and report more appropriate at this time?
- ☐ For all forms of informal reports, have I used a memo format?
- ☐ Is the subject line clear?
- ☐ Is the tone professional and polite but direct?
- ☐ For any report, have I done enough research so that my position is credible?
- ☐ Have I reviewed the Strategies box for my specific report type?



APPLICATIONS

GENERAL APPLICATIONS

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1. For this or another class, write a progress report to your instructor, describing the progress you've made on a project you are working on (your final project, for instance). Use the strategies suggested in this chapter. Or write a peer review report of a classmate's draft of an upcoming assignment.
2. For a current or past job or internship, write a periodic activity report in which you report on the past week's activities (actual or typical). Be sure to follow the strategies for periodic activity reports in this chapter.
3. Take notes at the next group event or meeting that you attend. Write up minutes for the meeting, thinking about how much detail to include and what kinds of information will be useful to the other members of the team.

TEAM APPLICATIONS

1. With two or three other classmates, identify a dangerous or inconvenient area or situation on campus or in your community (endless cafeteria lines,

an unsafe walkway, slippery stairs, a bad campus intersection). Observe the problem for several hours during a peak use period. Write a recommendation report to a specifically identified decision maker (the head of campus security, for example) describing the problem, listing your observations, and making a recommendation.

2. Convert the same report into a feasibility report by discussing several different approaches that might be taken and then recommending the feasibility of the approach you prefer.

GLOBAL APPLICATION

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Assume that you are a team leader of a company that is based in the United States but has offices worldwide. You have been assigned a new manager who is a citizen of another country. This week you need to write a report recommending that all the staff on your team receive bonuses. You know the tone you would take if your manager were from the United States, but you are uncertain about what tone or level of politeness is appropriate for this new manager. Pick a country and do some research on the Internet about tone, style, and politeness in different cultures, remembering that not everyone in a country or culture is exactly alike. Write a short memo to your instructor explaining what you have learned and how you would shape your recommendation report in this situation.

DIGITAL AND SOCIAL MEDIA APPLICATION

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As the examples in this chapter illustrate, most informal reports are written for internal audiences. Yet with the rise of social media, organizations are making some informal reports available to the public. Look at the Twitter feed for agencies like the Environmental Protection Agency (EPA) or the U.S. Department of Agriculture (USDA) and find links to one to two short, informal reports. Compare these reports to the examples in this chapter. What are the differences in formatting, tone, and style when these reports are written for external audiences?

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Visit Chapter 15, *Informal Reports*, in MyWritingLab to complete this chapter's applications, to explore this chapter's overview, checklist, and flashcards, and to test your understanding of the chapter objectives.