

Golden rules of writing well



By Gillian Christie

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After discussing document structure in my last two columns, this time I'm developing the theme with a specific focus on report writing.

The New Oxford Dictionary of English (1999) defines a report as: "An account given of a particular matter, especially in the form of an official document, after thorough investigation or consideration."

So a report is usually written after some reasonably thorough preparation or research into a topic or issue. There are many types of reports and many are given different names such as submission, issues paper, business case and the like. But essentially they are all reports and there are general techniques that will relate to them all. Obviously some reports, such as an audit report, will have certain requirements that also need to be taken into account.

Reports can vary widely in length and complexity. There are five stages in preparing and writing a report, but for shorter, simpler reports not all stages will be needed, or two stages may merge.

Think/plan

You can't write a report in a "stream of consciousness" way. Before putting fingers to keyboard, take a few moments to think about your reader(s) and the purpose of your document. Are you aiming to convince a board of directors that a particular course of action is the best? Do you want to dissuade a client from doing something that might get them into trouble with Inland Revenue? Or are you simply presenting the final costings for a project?

Make sure you are clear on what your

reader wants from you. You don't want to spend a lot of time preparing a lengthy report when all that was needed was a list of ideas for discussion. Also think about what your reader already knows about the topic, as this will have a bearing on the level of detail you need to include.

Planning your report may take just a few minutes' thought but it is important to get you on the right track.

Don't fall into the trap of giving your reader every bit of information you've gathered

Research

This is where you gather the information you need for your report. You may not use all of it – some may end up being background information to help you as you write. Source material could be legislation, court cases, client records, and details gathered from websites, interviews or phone calls. Discussions with colleagues can also contribute to your store of information.

Structure/sort

When you have completed your research you need to organise the material you've gathered. Type up a list of the main points arising from your research. You can organise them in a variety of ways. Here are some ways you can sort the information into groups of related points.

- Use the cut and paste function – this gives you a ready-made framework for your report, but some people don't like this method because the screen

size means you can't see all the points at once.

- Have a coding system and assign each point a code, such as A for analysis, B for background, C for costings – depending on the sections of your report (next month's article). A related method is to draw columns headed with the report sections and tick the relevant column for each point.
- Actually cut up the list and physically sort the points into piles. This might sound strange, but it is really effective for people who find that doing something physical helps their brain sort things out.

Rather than starting with a typed list, you could use a mind map – this works particularly well for a team report. For a group discussion, make sure you use a whiteboard that prints!

As you sort your points you might find that some can be left out. Don't fall into the trap of giving your reader every bit of information you've gathered – assess each point critically to see if it suits the purpose of your report. If your report is cluttered with too much detail your reader will find it hard to extract the important points.

It's really important to structure your report in a logical way. I like to think of it as leading the reader in such a way that when they get to the end they should understand exactly how you reached your conclusion or recommendation. They should never get to the end and be surprised!

Next time I'll cover the main sections of a report and the information that might go in each part. ■

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In last month's column I set out the first three steps in preparing a report. Step three was structuring or sorting the information you gathered in the research stage. To help you do this you need to have an idea of how you will split your report into sections and what you'll call each part.

So this month we'll have a look at the main sections of a report. Not all reports will need all the parts listed here, and you might like to use different titles or headings for your sections. The information here is general and you may need to adapt it to suit different circumstances. Many organisations have report templates designed to suit their specific requirements, so the structure is already set up for you.

Header

Start your report by showing who it is for (intended audience), who wrote it, the date and the topic. How you set this out is up to you, as long as it is clear and meets any standards set by your organisation.

Introduction/purpose

This is a short section that tells your reader what the report is about and why you have prepared it. If your reader is required to do something (such as provide feedback, endorse a recommendation), tell them here so they are prepared.

Background

This is where you set the scene, perhaps by recounting events that led up to the situation or issue at hand. Keep it brief and only include relevant information. You may not always need a background section in addition to the introduction.

Discussion/analysis

This is the "body" of your report and is where all the detail goes. You can break this into smaller sections/subsections and use descriptive headings to create a path for your reader. Start with the most important/interesting points first then move down to the finer detail.

Conclusion/recommendation

You could have either or both of these sections. A conclusion wraps up the report, perhaps restating the main findings and explaining why they back up a decision or course of action. This can lead to recommendations for future action or change. A shorter report might go straight into recommendations and not need a conclusion section as well. If there are no recommendations then a short conclusion is enough.

Appendices

To avoid having too much detail in the report itself, you can attach appendices. They are useful because readers who want extra information can find it easily but readers who don't can simply ignore it. Some examples of what can be removed to an appendix are:

- copy of sections of legislation
- long quotes from a case
- printouts of website pages
- copies of information from client records
- comparative costing information
- full details of the methodology used in researching the report
- a list of sources (this could also be called References or Bibliography).

What about a summary?

A summary section is not usually needed

in short reports. For a long report, some writers like to present a summary as the introductory section so the readers know where the report is headed straight away. Other writers prefer to summarise the report in the conclusion. There's no hard and fast rule about this – think about what your reader needs and expects, and what will best suit your topic and writing style.

An executive summary is a stand-alone document that covers the main points of a longer report, including the conclusion and recommendations. It is often prepared for readers who want to know what's going on but don't want all the detail that other readers need. It needs to make sense when read on its own but without the detail of the main report.

Martin Cutts, in *The Plain English Guide* (Oxford, 1995, p116), says this of a report summary:

"This serves up the report's most interesting points in bite-sized chunks. It should briefly set out the report's purpose, main findings, main conclusions and main recommendations. It is designed to give an accurate and rapid understanding of the main issues, enabling busy readers to ignore everything else if they wish."

When you've sorted your research information into the various sections of your report, you're ready to write – step four is next month.

Word mixups

Reticent – not revealing one's thoughts or feelings readily. *She was reticent about her personal life.*

Reluctant – unwilling, hesitant, disinclined. *He was reluctant to discuss his personal life.* 📖

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Having a break from the document allows you to read it with a perspective that is closer to your reader's

In the March 2008 *Journal* (p 62) I covered the first three stages in report preparation:

1. think/plan
2. research
3. structure/sort.

Then in April (p 68) I discussed the division of the report into sections and the information that might go in each section. This month covers the last two steps.

4. Write

Stage 4 is actually writing the report. The sorting or structuring stage will have given you a skeleton or framework for your report, so you will know what points are to be covered in each section. So the writing is really a “fleshing-out” process – turning your lists of points into proper sentences and paragraphs.

In the structuring stage you sorted out the overall order of information for your report. Now, as you write each section, you need to ensure that the points within each section also flow logically and smoothly. It's probably easiest to start with your introduction/purpose and write in the same order as your reader will read – obviously any summary would be done last.

However, you may prefer to work backwards, starting with your recommendation. If you do this you'll need to check extra carefully that your report does make sense when read from the top down!

Writing style

Reports can easily become dry documents that are boring to read. Often that happens because writers focus all their attention on the information and forget about the way it's presented. So reports can end up with a lot of jargon and technical terms, long sentences and an overuse of the passive voice. It's common to read anonymous sentences such as:

- *It is recommended that...*
- *It was found that...*
- *The results were analysed...*

In my July 2006 *Journal* column (p 72) I discussed the active voice: using the pattern “who did what” for the majority of your sentences. In a report, the active voice creates a livelier style that is much more interesting for your reader. Realistically, if your name is on the report header and the reader knows that you did the research and writing, there's no point in trying to remain anonymous by using the passive voice. So take responsibility for your actions and thoughts: *I found that... I analysed the results... I recommend that...* Of course, if you are writing to represent the work and decisions of a team, you'd use the word “we” rather than “I”.

Always keep your reader in mind. Remember that they are likely to be busy, so don't make them wade through long, wordy sentences or wonder about the meaning of technical or complex terminology. Avoid or explain jargon if necessary – and remember that even people within your own organisation may not know all the jargon used in your field of expertise.

Bullet points are an excellent way to chop up



long sentences, and they also make it easier for your reader to see the points.

Also consider whether some information could be presented in a table or graph (bar, pie, etc). This will help your reader quickly and easily interpret figures such as statistics or costings. If you do this, refer to the table/graph in the text, perhaps mentioning a couple of key points, but don't repeat all the information.

5. Revise

This applies to any document you've written – you must check it before it goes to the intended audience. Often it can be hard to spot errors or inconsistencies in a document you've written because you can get too close to it – you end up reading what you thought you wrote rather than what you actually wrote. That's why revision is

always more effective if you can leave the document for a while – preferably overnight or a few days – before reading it again. Having a break from the document allows you to read it with a “fresh eye” and a perspective that is closer to your reader's. If possible, and especially if it's a really important or sensitive document, ask a colleague to read it and provide feedback.

When you review your report, check that the layout is professional, uncluttered and enhances the information you are presenting. Most organisations have report templates that do this job for you. Make sure that your heading “hierarchy” is clear and any numbering system is logical.

Troublesome words

Only – this is called a “determiner” – which means it indicates or determines

what is being referred to. Generally it is placed immediately before the word or phrase it applies to – which means that shifting its placement may change the meaning of your sentence. For example:

- *Only he prepares tax returns* (no one else prepares tax returns).
- *He only prepares tax returns* (he doesn't do anything else with the tax returns).
- *He prepares only tax returns* (he doesn't prepare anything else).

In speech the rule is not so rigid because we can use tone, pausing and inflection to indicate what “only” refers to. But for clarity in writing, aim to put “only” in front of its target word or phrase.

Please feel free to email me with suggestions of any troublesome words you'd like me to explain. 📧