Informal Reports

- Informal Reports
  - Contain about two to five pages of text, not including attachments
  - Contain more substance than a simple letter or memo but less than a formal report
  - Directed to readers outside (letter report) or inside your organization (memo report)

Letter Reports at M-Global

Memo Reports at M-Global
General Guidelines for Informal Reports

- Plan Well Before You Write
- Use Letter or Memo Format
- Make Text Visually Appealing
- Use the ABC Format for Organization
- Call the Abstract an Introductory Summary

General Guidelines for Informal Reports

- Put Important Details in the Body
  - Separate Fact from Opinion
  - Focus Attention in Your Conclusion
  - Use Attachments for Less Important Details
  - Edit Carefully

General Guidelines for Informal Reports

- Make Text Visually Appealing
  - Use bulleted points
  - Use numbered points for ordered steps
  - Use frequent headings and subheadings
  - Use the ABC Format for Organization
  - Abstract
  - Body
  - Conclusion

General Guidelines for Informal Reports

- Plan Well Before You Write
  - Use the Planning Form to record specific information about these points...
    - Document's purpose
    - Variety of readers who will receive document
    - Needs and expectations of readers
    - Outline of main points
  - Use Letter or Memo Format

General Guidelines for Informal Reports

- Call the Abstract an Introductory Summary
  - Include three essential pieces of information
    - Purpose for the report
    - Scope statement
    - Summary of essentials
General Guidelines for Informal Reports

- Put Important Details in the Body
- Use headings generously
- Precede subheadings with a lead-in passage
- Move from general to specific in paragraphs

General Guidelines for Informal Reports

- Separate Fact From Opinion
- Report facts you uncover
- Provide ideas or beliefs you develop from your findings
- Recommend or suggest action items based on your conclusions

General Guidelines for Informal Reports

- Focus Attention in Your Conclusions
  - Briefly restate your conclusion or recommendation to reinforce importance
  - Give more detail if not covered earlier
- Use Attachments for Less Important Details

General Guidelines for Informal Reports

- Edit Carefully
  - Keep most sentences short and simple
  - Proofread several times
  - Triple-check all cost figures for accuracy
  - Make sure all attachments are included
  - Check the format and wording of all headings and subheadings
  - Ask a colleague to check over the report

Specific Guidelines for Five Informal Reports

- Problem Analyses
- Recommendation Reports
- Equipment Evaluations
- Progress/Periodic Reports
- Lab Reports

Specific Guidelines for Five Informal Reports

- Problem Analyses
  - Presents readers with a detailed description of problems
    - Follow ABC Format for Problem Analyses
Specific Guidelines for Five Informal Reports

- **Problem Analyses**
  - Abstract
    - Purpose/Summary of problems
  - Body
    - Background/Description of problems/Data
  - Conclusion
    - Brief restatement/Degree of urgency/Suggested next step

- **Recommendation Reports**
  - Presents readers with specific suggestions that affect personnel, equipment, procedures, products, services, etc.
  - Use ABC Format for Recommendation Reports
  - Abstract
    - Purpose/Brief reference to problem/Capsule summary of recommendations
  - Body
    - Details about problem/Recommendations/Data that support recommendations/Benefits/Drawbacks
  - Conclusion
    - Brief restatement/Main benefit/Your offer to help with next step

- **Equipment Evaluations**
  - Provides objective data about how equipment has, or has not, functioned
  - Use ABC Format for Equipment Evaluations
  - Abstract
    - Purpose/Capsule summary
  - Body
    - Thorough description of equipment/Well-organized critique/Additional supporting data, with reference to any attachments
  - Conclusion
    - Brief restatement of major findings, conclusions, or recommendations

- **Progress Reports**
  - Provides your manager with details about work on a specific project
  - Use ABC Format for Progress/Periodic Reports
  - Abstract
    - Purpose/Capsule summary
  - Body
    - Thorough description of progress/Well-organized critique/Additional supporting data, with reference to any attachments
  - Conclusion
    - Brief restatement of major findings, conclusions, or recommendations
Specific Guidelines for Five Informal Reports

- **Progress/Periodic Reports**
  - Abstract
    - Purpose/Capsule summary/Main progress to date
  - Body
    - Description of work completed/Clear reference to any dead ends/Explanation of delays/Description of work remaining/Reference to attachments
  - Conclusion
    - Brief restatement of work/Expression of confidence or concern/Willingness to make suggested adjustments

- **Lab Reports**
  - Describes work done in any laboratory - with emphasis on topics such as purpose of work, procedures, equipment, problems, results, and implications
  - Use ABC Format for Lab Reports

Specific Guidelines for Five Informal Reports

- **Lab Reports**
  - Abstract
    - Purpose/Capsule summary
  - Body
    - Purpose or hypothesis of lab work/Equipment needed/Procedures or methods used in lab test/Unusual occurrences/Results of test
  - Conclusion
    - Statement or restatement of main results/Implications of lab test for further work

Letters, Memos, and Electronic Correspondence

- **General Guidelines for Correspondence**
  - Letters
  - Memoranda
  - Email
  - Memoranda versus Email

General Guidelines for Correspondence

- Know Your Purpose
- Know Your Readers
- Follow Correct Format
- Follow the ABC Format for All Correspondence
- Use the 3Cs Strategy for Persuasive Messages

General Guidelines for Correspondence

- Stress the "You" Attitude
- Use Attachments for Details
- Be Diplomatic
- Edit Carefully
- Respond Quickly
Letters

- Positive Letters
- Negative Letters
- Neutral Letters
- Sales Letters
- Memoranda

Specific Guidelines for Letters

- Positive Letters
  - State good news immediately!
  - Follow ABC Format
    - Abstract
      - bridge between this letter and last communication with person
      - clear statement of good news

- Negative Letters
  - Buffer the bad news, but still be clear
  - Follow ABC Format
  - Abstract
    - bridge between your letter and previous communication
    - general statement of purpose or appreciation
Specific Guidelines for Letters

Negative Letters
- Follow ABC Format
- Conclusion
  - closing remarks that express interest in continued association
  - statement, if appropriate, of what will happen next

Neutral Letters
- Be absolutely clear about your inquiry or response
- Follow ABC Format
  - Abstract
    - bridge or transition between letter and previous communication, if any
    - precise purpose of letter

Neutral Letters
- Follow ABC Format
  - Body
    - details that support the purpose statement
    - description of item requested
    - requirements related to invitation
    - description of item being sent
  - Conclusion
    - statement of appreciation
    - description of actions that should occur next

Sales Letters
- Help readers solve their problems
- Follow ABC Format
  - Abstract
    - cite a surprising fact
    - announce a new product or service
    - ask a question
    - show understanding of client’s problem
    - show potential for solving client’s problem
    - present a testimonial
    - make a challenging claim
- Follow ABC Format
  - Body
    - stress one main problem reader has concern about
    - stress one main selling point of your solution
    - emphasize what is unique about your solution
    - focus on value and quality, rather than price
    - put details in enclosures
    - briefly explain the value of any enclosures
Specific Guidelines for Letters

- Sales Letters
  - Follow ABC Format
  - Conclusion
    - Leave the reader with one crucial point to remember
    - Offer to call, or ask reader to call

Specific Guidelines for Memos

- Memoranda
  - Be clear, brief, and tactful
  - Follow ABC Format
    - Abstract
      - Clear statement of memo’s purpose
      - Outline of main parts of memo

Specific Guidelines for Memos

- Memoranda
  - Follow ABC Format
  - Body
    - Supporting points, with strong points at beginning and/or end
    - Frequent use of short paragraphs or listed items
    - Absolute clarity about how memo relates to reader
    - Tactful presentation of any negative news
    - Reference to attachments, when additional detail is required
  - Conclusion
    - Clear statement of what step should occur next
    - Another effort to retain goodwill and cooperation of readers

Email

- Guidelines for Email
- ABC Format for Email
- Appropriate Use and Style of Email

Email

- Guidelines for Email
  - Use Style Appropriate to the Reader and Subject
  - Be Sure Your Message Indicates the Context to Which It Applies
  - Choose the Most Appropriate Method for Replying to a Message
  - Format Your Message Carefully
Email
- Guidelines for Email
  - Chunk Information for Easy Scanning
  - Give Readers a Method to Abstain from Receiving Future Notices
  - Suppress the Email Addresses of Recipients
  - When Composing an Important Message, Consider Composing on Your Word Processor

Email
- Follow ABC Format
  - Abstract
    - casual, friendly greeting
    - short, clear statement of purpose
    - list of main topics

Email
- Follow ABC Format
  - Body
    - supporting information for points mentioned in abstract
    - use of short paragraphs
    - use of headings and lists
    - Use of abbreviations and jargon only when understood by reader

Email
- Follow ABC Format
  - Conclusion
    - summary of main point
    - clarity about action that comes next

Appropriate Use and Style of Email
- Email Is Not Private
- Email Should Be Written Carefully
- Email Style May Be Informal
- Don't Send It Too Quickly!

Memoranda Versus Email
- Send a memo if
  - The document is longer than can be viewed on a computer screen
  - The document includes special characters
  - The document includes graphics
  - The document will be posted in print form
  - The document contains sensitive information