Informal Reports

- When to Use Informal Reports
- General Guidelines for Informal Reports
- Specific Guidelines for Five Informal Reports

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

- 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

- 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

- 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

- 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

- 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
  - 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
  - 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

- Periodic Reports
  - Summarizes your work on diverse tasks over a specific period of time
  - Use ABC Format for Progress/Periodic Reports
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