PART 5

Planning, Writing, and Completing Reports and Proposals

CHAPTER 13
Planning Reports and Proposals

CHAPTER 14
Writing Reports and Proposals

CHAPTER 15
Completing Reports and Proposals
LEARNING OBJECTIVES

After studying this chapter, you will be able to:

1. Explain the differences between informational reports and analytical reports.
2. Adapt the three-step writing process to reports and proposals.
3. Explain the value of a work plan in the development of long reports.
4. Describe the four major categories of informational reports and provide examples of each.
5. List the key elements of a business plan.
6. Identify three steps you can take to ensure effective organization of online reports and other website content.
7. Describe the three major categories of analytical reports and provide examples of each.
8. Discuss three major ways to organize analytical reports.
9. Explain how your approach to writing proposals should differ when you are responding to a formal request for proposals (RFP).

COMMUNICATION CLOSE-UP

AT KENWOOD USA

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The last time you shopped for the latest audio or video product, probably the last thing on your mind was market research or communications. However, if a feature or design caught your attention, chances are it was the result of extensive research and effective reports and other business communication efforts. As Keith Lehmann, Senior Vice President at Kenwood USA, explains, “In rapidly changing markets such as consumer electronics, research gives us a road map for the products we need to build for the future, and communication with our customers helps us confirm the results of our research.”

Recently, Lehmann’s research team analyzed the mobile satellite radio market in the United States and determined that although fewer than 2 million drivers had either XM Radio or Sirius Satellite Radio, consumers were enthusiastic about satellite radio. The potential for market growth was tremendous, but despite the enthusiasm of Kenwood’s marketing group, the product planning team was more cautious.

Kenwood relies heavily on reports to communicate market needs from managers and analysts in the United States to product designers in Japan.
LEARNING OBJECTIVE

Explain the differences between informational reports and analytical reports.

The purpose and content of business reports vary widely; in some cases you’ll follow strict guidelines, but in others the organization and format will be up to you.

Balancing risk and reward, they had detailed questions and needed more information about competitive offerings, projected prices, and other key issues before committing resources to a new product category.

Throughout its 50-plus years of worldwide operations, Kenwood has fostered close relationships with its base of dealers. This strategy has allowed the company to learn valuable information about specific customer wants and needs. Lehmann’s team decided to conduct a comprehensive dealer survey that sought answers to the key questions from the product planners.

The survey ultimately validated Lehmann’s convictions that satellite radio was indeed poised for rapid growth. His team was able to convince the product planners that the technology should be prominently featured in Kenwood’s new mobile audio components, which enabled the company to capture the leading edge of a significant market trend. As Lehmann said later, “Solid market research and strong communications with both our dealers and customers provide the tools we need to seize emerging product trends in advance of our competitors.”

CREATING EFFECTIVE REPORTS AND PROPOSALS

As with all business professionals, reports and proposals play a significant role in Keith Lehmann’s success at Kenwood (profiled in the chapter-opening Communication Close-Up). Reports are written accounts that objectively communicate information about some aspect of the business; proposals are a special category of reports that combine information delivery and persuasive communication. You’ll encounter dozens of reports in all shapes and sizes throughout your career, but they all fall into three basic categories:

- **Informational reports** offer data, facts, feedback, and other types of information, without analysis or recommendations.
- **Analytical reports** offer both information and analysis, and they can also include recommendations.
- **Proposals** offer structured persuasion for internal or external audiences.

The nature of these reports can vary widely, depending on the circumstances surrounding them. Some of your reports will be voluntary, written at your own initiative and following the structure you find most effective. Other reports will be in response to a manager’s or customer’s request, and you may or may not receive guidance regarding the organization and content. You’ll also write reports that follow strict, specific guidelines for content and layout, as with most reports that are required by government agencies. You may write some reports only once in your career; others you may write or update annually, monthly, weekly, or even daily.

Your audience will sometimes be internal, which gives you more freedom to discuss sensitive information with less regard for potential misinterpretation. At other times, your audience might include customers, investors, community members, or news media, any of which can create additional demands as you present company information to such external groups.

Finally, your reports will vary widely in length and complexity. You may write one-page, memo-format reports that are simple and straightforward. Or you may write reports that cover complicated subjects, that run into hundreds or even thousands of pages, and that involve multiple writers and an array of technological tools.

No matter what the circumstances, these longer messages require all the skills and knowledge that you’ve gained throughout this course and will continue to gain on the job. Memos, e-mails, and other short messages will constitute most of your daily communication on the job, but writing reports and proposals is your chance to really shine. Try to view every business report as an opportunity to demonstrate your understanding of your audience’s challenges and your ability to contribute to your organization’s success.
APPLYING THE THREE-STEP WRITING PROCESS TO REPORTS AND PROPOSALS

By carefully applying the three-step writing process (see Figure 13.1), you can reduce the time required to write effective reports and still produce documents that make a lasting and positive impression on your audience. The concepts are the same as those you explored in Chapters 4 through 6 and applied to shorter messages in Chapters 7 through 10; however, the emphasis on various substeps can vary considerably. For instance, the planning step alone can take days or weeks for a complex report or proposal.

Part 5 offers in-depth coverage of the three-step writing process for reports and proposals. This chapter discusses planning, Chapter 14 discusses writing, and Chapter 15 covers completing reports and proposals. Because much of the writing process is already covered in Chapters 4 through 6, Chapters 13 through 15 focus on those aspects that are unique to, or that require special attention for, longer messages.

Analyzing the Situation

The complexity of most reports and the magnitude of the work involved heighten the need to analyze the situation carefully. With an e-mail or other short message, you can change direction halfway through the first draft and perhaps lose only a few minutes of work. In contrast, if you change direction halfway through a major report, you could lose days, weeks, or even months. To minimize that chance, pay special attention to your statement of purpose. In addition, for anything beyond the simplest reports, take the time to prepare a work plan before you start writing.

**FIGURE 13.1** Three-Step Writing Process for Reports and Proposals

The three-step writing process becomes even more valuable with reports and proposals. By guiding your work at each step, the process helps you make the most of the time and energy you invest.

**Plan**

- **Analyze the Situation**
  Clarify the problem or opportunity at hand, define your purpose, develop an audience profile, and develop a work plan.
- **Gather Information**
  Determine audience needs and obtain the information necessary to satisfy those needs; conduct a research project if necessary.
- **Select the Right Medium**
  Choose the best medium for delivering your message; consider delivery through multiple media.
- **Organize the Information**
  Define your main idea, limit your scope, select a direct or an indirect approach, and outline your content using an appropriate structure for an informational report, analytical report, or proposal.

**Write**

- **Adapt to Your Audience**
  Be sensitive to audience needs with a you ‘ attitude, politeness, positive emphasis, and bias-free language. Build a strong relationship with your audience by establishing your credibility and projecting your company’s image. Control your style with a tone and voice appropriate to the situation.
- **Compose the Message**
  Choose strong words that will help you create effective sentences and coherent paragraphs throughout the introduction, body, and close of your report or proposal.

**Complete**

- **Revise the Message**
  Evaluate content and review readability, then edit and rewrite for conciseness and clarity.
- **Produce the Message**
  Use effective design elements and suitable layout for a clean, professional appearance; seamlessly combine text and graphical elements.
- **Proofread the Message**
  Review for errors in layout, spelling, and mechanics.
- **Distribute the Message**
  Deliver your report using the chosen medium; make sure all documents and all relevant files are distributed successfully.

2 LEARNING OBJECTIVE

Adapt the three-step writing process to reports and proposals.
Defining Your Purpose

Informational reports often address a predetermined need and must meet specific audience expectations. For example, you may be asked to write reports that verify your company’s compliance with government regulations, that summarize sales, or that monitor a process—all of which have audiences who expect certain information in a certain format. You may also be asked to write other informational reports that require you to examine both audience needs and your own needs before you can define the optimum purpose.

Analytical reports and proposals are almost always written in response to a perceived problem or a perceived opportunity. A clear statement of this problem or opportunity helps frame the communication challenge by identifying what you’re going to write about, but it’s insufficient to guide your writing efforts. To plan effectively, address the problem or opportunity with a clear statement of purpose that defines why you are preparing the report (see Table 13.1).

The most useful way to phrase your purpose statement is to begin with an infinitive phrase (to plus a verb). Using an infinitive phrase encourages you to take control and decide where you’re going before you begin. When you choose an infinitive phrase (such as to inform, to confirm, to analyze, to persuade, or to recommend), you pin down your general goal in preparing the report. Consider these examples for informational reports:

- To update clients on the progress of the research project (progress report)
- To develop goals and objectives for the coming year (strategic plan)
- To submit monthly sales statistics to management (operating report)
- To summarize what occurred at the annual sales conference (personal activity report)
- To explain building access procedures (policy implementation report)
- To submit required information to the Securities and Exchange Commission (compliance report)

Your statement of purpose for an analytical report often needs to be more comprehensive than one for an informational report. Linda Moreno, the cost accounting manager for Electrovision, a high-tech company based in Los Gatos, California, was recently asked to find ways of reducing employee travel and entertainment costs (her complete report appears in Chapter 15). Because Moreno was supposed to suggest specific ways to solve a problem, she phrased her statement of purpose accordingly:

... to analyze the T&E [travel and entertainment] budget, evaluate the impact of recent changes in airfares and hotel costs, and suggest ways to tighten management’s control over T&E expenses.

<table>
<thead>
<tr>
<th>PROBLEM STATEMENT</th>
<th>STATEMENT OF PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our company’s market share is steadily declining.</td>
<td>To explore new ways of promoting and selling our products and to recommend the approaches most likely to stabilize our market share.</td>
</tr>
<tr>
<td>Our current computer network lacks sufficient bandwidth and cannot be upgraded to meet our future needs.</td>
<td>To analyze various networking options and to recommend the system that will best meet our company’s current and future needs.</td>
</tr>
<tr>
<td>We need $2 million to launch our new product.</td>
<td>To convince investors that our new business would be a sound investment so that we can obtain desired financing.</td>
</tr>
<tr>
<td>Our current operations are too decentralized and expensive.</td>
<td>To justify the closing of the Newark plant and the transfer of East Coast operations to a single Midwest location in order to save the company money.</td>
</tr>
</tbody>
</table>
If Moreno had been assigned an informational report instead, she might have stated her purpose differently:

To summarize Electrovision’s spending on travel and entertainment

You can see from these two examples how much influence the purpose statement has on the scope of your report. If Moreno’s manager had expected her to suggest ways to reduce costs but Moreno had collected only cost data, her report would have failed to meet expectations. Because she was assigned an analytical report rather than an informational report, Moreno had to go beyond merely collecting data; she had to draw conclusions and make recommendations.

Proposals must also be guided by a clear statement of purpose to help you focus on crafting a persuasive message. Here are several examples:

- To secure funding in next year’s capital budget for a new conveyor system in the warehouse (funding proposal)
- To get management approval to reorganize the North American salesforce (general project proposal)
- To secure $2 million in venture capital funding to complete design and production of the new line of titanium mountain bikes (investment proposal as part of a business plan)
- To convince CommuniCo to purchase a trial subscription to our latest database offering (sales proposal)

Remember, the more specific your purpose statement, the more useful it will be as a guide to planning your report. Furthermore, always double-check your statement of purpose with the person who authorized the report. After seeing the purpose written down in black and white, the authorizer may decide that the report needs to go in a different direction. Once your statement of purpose is confirmed, you’re ready to prepare your work plan.

Preparing Your Work Plan

You’re already accustomed to some schedule pressure with school reports. This is good practice for your business career, when you’ll be expected to produce quality reports quickly and efficiently. A carefully thought-out work plan is the best way to make sure you produce good work on schedule. By identifying all the tasks that must be performed, you ensure that nothing is overlooked.

If you are preparing the work plan for yourself, it can be relatively informal: a simple list of the steps you plan to take and an estimate of their sequence and timing. However, for more complicated projects, particularly those that involve multiple team members, you’ll want to prepare a formal, detailed work plan that can guide the performance of many tasks over a span of time. For consultants and others whose work output is a formal report, the work plan can also become the basis for a contract if the proposal is accepted. A formal work plan might include the following elements (especially the first two):

- **Statement of the problem or opportunity.** The problem statement clarifies the challenge you face, helps you (and anyone working with you) stay focused on the core issues, and helps everyone avoid the distractions that are likely to arise along the way.
- **Statement of the purpose and scope of your investigation.** The purpose statement describes what you plan to accomplish and therefore also defines the boundaries of your work. Stating which subjects you will cover and which you won’t is especially important for complex, lengthy investigations.
- **Discussion of tasks to be accomplished.** Be sure to indicate your sources of information; the research necessary; and any constraints on time, money, personnel, or data. For simple reports, the list of tasks to be accomplished will be short and probably obvious. However, longer reports and complex investigations require an exhaustive list so that you can reserve time with customers, with executives, or for outside services such as market researchers or print shops.
- **Description of any products that will result from your investigation.** In many cases, the only product of your efforts will be the report itself. In other cases, you’ll need to produce something beyond a report, perhaps a new marketing plan or even a tangible...
product. Make these expectations clear at the outset, and be sure to schedule enough time and resources to get the job done.

- **Review of project assignments, schedules, and resource requirements.** Indicate who will be responsible for what, when tasks will be completed, and how much the investigation will cost. If more than one person will be involved, you may also want to include a brief section on coordinating report writing and production, such as whether you’ll use a wiki to develop the report content. (Collaborative writing is discussed in detail in Chapter 2.)

- **Plans for following up after delivering the report.** Follow-up can be as simple as making sure people received the information they need or as complex as conducting additional research to evaluate the results of proposals included in your report. Even informal follow-up can help you improve your future reports and communicate that you care about your work’s effectiveness and its impact on the organization.

- **Working outline.** Some work plans include a tentative outline of the report, as does the plan in Figure 13.2.

### Gathering Information

As you discovered in Chapter 11, you may need to use a variety of techniques to gather the information required to meet audience needs. For instance, the market researchers at Kenwood USA (see page 393) gather information in numerous ways, from conducting surveys and one-on-one interviews to getting anecdotal feedback from consumers and retailers, combing through industry publications, and checking competitors’ marketing materials.²

The sheer volume of information in most reports and proposals requires careful planning—and may even require a separate research project just to acquire the data and information you need. To stay on schedule and on budget, be sure that you review both your statement of purpose and your audience’s needs so that you collect all the information required—and only the information required. Prioritize your needs before you start, and focus on the most important questions. Experienced writers also try to avoid duplication of effort by using templates and boilerplate material whenever possible (not only for gathering information but also for writing).

### Selecting the Right Medium

In addition to the general media selection criteria discussed in Chapter 4, consider several points for reports and proposals. Start with what you know about audience expectations. In some situations, audiences have specific media requirements, and you might not have a choice. For instance, executives in many corporations now expect to review reports via their in-house intranets, sometimes in conjunction with an executive dashboard, a customized online presentation of key operating variables such as revenue, profits, quality, customer satisfaction, and project progress.

In other situations, your audience might be more flexible but still have preferences. If an audience of several managers is likely to make comments on your report, would the managers rather write on a paper copy or use the revision features in a word-processor file? Will you or someone else be revising or updating the report? Given the multiple benefits of electronic reports (including low distribution costs, searchability, and easy archiving), expect to deliver many or even most of your reports in electronic format in the future.

Consider delivering your report via multiple media, too. For instance, even the best-written reports can often benefit from in-person communication. To ensure effective communication, Kenwood employees in the United States and Japan discuss their reports frequently, via both teleconferences and meetings in both countries. Again, the decision comes down to a balance of what’s best for both you and your audience.

Whatever you decide, bear in mind that your choice of media also sends a message. A proposal that requests a venture capital investment of $5 million would look unimpressive as just a plain, coarsely formatted word-processor document that could have been churned out on a manual typewriter. Conversely, a routine operating report dressed up in expensive multimedia will look like a waste of valuable company resources.
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FIGURE 13.2 Work Plan for a Report
A formal work plan such as this is a vital tool for planning and managing complex writing projects. The preliminary outline here helps guide the research; the report writers may well modify the outline when they begin writing the report.

STATMENT OF THE PROBLEM
The rapid growth of our company over the past five years has reduced the sense of community among our staff. People no longer feel like part of an intimate organization that values teamwork.

PURPOSE AND SCOPE OF WORK
The purpose of this study is to determine whether a company newsletter would help rebuild a sense of community within the workforce. The study will evaluate the impact of newsletters in other companies and will attempt to identify features that may be desirable in our own newsletter. Such variables as length, frequency of distribution, types of articles, and graphic design will be considered. Costs will be estimated for several approaches, including print and electronic versions. In addition, the study will analyze the personnel and procedures required to produce a newsletter.

SOURCES AND METHODS OF DATA COLLECTION
Sample newsletters will be collected from 10 to 20 companies similar to ours in size, growth rate, and types of employees. The editors will be asked to comment on the impact of their publications on employee morale. Our own employees will be surveyed to determine their interest in a newsletter and their preferences for specific features. Production procedures and costs will be analyzed through conversations with newsletter editors, printers, and our website development team.

PRELIMINARY OUTLINE
The preliminary outline for this study is as follows:
I. Do newsletters affect morale?
   A. Do people read them?
   B. How do employees benefit?
   C. How does the company benefit?
II. What are the features of good newsletters?
   A. How long are they?
   B. What do they contain?
   C. How often are they published?
   D. How are they designed?
III. How should a newsletter be produced?
   A. Should it be written and edited internally or externally?
   B. Should it be printed or produced electronically?
   C. If electronic, should it be formatted as e-mail, a blog, or regular web content?
IV. What would a newsletter cost?
   A. What would the personnel cost be?
   B. What would the material cost be?
   C. What would outside services cost?
V. Should we publish a company newsletter?
VI. If so, what approach should we take?

TASK ASSIGNMENTS AND SCHEDULE
Each phase of this study will be completed by the following dates:

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect/analyze newsletters</td>
<td>Hank Waters</td>
<td>September 15, 2008</td>
</tr>
<tr>
<td>Interview editors by phone</td>
<td>Hank Waters</td>
<td>September 22, 2008</td>
</tr>
<tr>
<td>Survey employees</td>
<td>Julienne Cho</td>
<td>September 29, 2008</td>
</tr>
<tr>
<td>Develop sample</td>
<td>Hank Waters</td>
<td>October 6, 2008</td>
</tr>
<tr>
<td>Develop cost estimates</td>
<td>Julienne Cho</td>
<td>October 13, 2008</td>
</tr>
<tr>
<td>Prepare report</td>
<td>Hank Waters</td>
<td>October 20, 2008</td>
</tr>
<tr>
<td>Submit final report</td>
<td>Hank Waters</td>
<td>October 24, 2008</td>
</tr>
</tbody>
</table>

Organizing Your Information
The length and complexity of most reports and proposals require extra emphasis on clear, reader-oriented organization. Your readers might have the patience to struggle through a disorganized e-mail message but not through a poorly organized 200-page report. As discussed in Chapter 4, when an audience is likely to be receptive or at least open-minded, use a direct approach: Lead off with a summary of your key findings, conclusions, recommendations, or proposal, as the case may be. This “up-front” arrangement is by far the most popular and convenient for business reports. It saves time and makes the rest of the report easier to follow. For those who have questions or want more information, later parts of the report provide complete findings and supporting details. A direct approach also produces a more

Most business reports use a direct approach.
forceful report. You sound sure of yourself when you state your conclusions confidently at the outset.

At times, however, confidence may be misconstrued as arrogance. If you're a junior member of a status-conscious organization or if your audience is skeptical or hostile, consider an indirect approach: Introduce your complete findings and discuss all supporting details before presenting your conclusions and recommendations. An indirect approach gives you a chance to prove your points and gradually overcome your audience’s reservations. By deferring the conclusions and recommendations to the end of your report, you imply that you’ve weighed the evidence objectively. You also imply that you’re subordinating your judgment to that of the audience, whose members are capable of drawing their own conclusions when they have access to all the facts.

Although the indirect approach has its advantages, some readers will always be in a hurry to get to the answer and will immediately flip to the recommendations anyway, thus defeating your purpose. Therefore, consider length before choosing the direct or indirect approach. In general, the longer the message, the less effective an indirect approach is likely to be.

Because both direct and indirect approaches have merit, businesspeople often combine them. They reveal their conclusions and recommendations as they go along rather than putting them either first or last. Figure 13.3 presents the introductions from two reports with

FIGURE 13.3 Direct Approach Versus Indirect Approach in an Introduction
In the direct version of this introduction, the writer quickly presents the report’s recommendation, followed by the conclusions that led to that recommendation. In the indirect version, the same topics are introduced in the same order but no conclusions are drawn about them (the conclusions and the ultimate recommendation appear later, in the body of the report).
the same general outline. In the direct version, a series of statements summarizes the conclusion reached in relation to each main topic on the outline. In the indirect version, the same topics are introduced in the same order but without drawing any conclusions about them. Instead, the conclusions appear within the body of the report.

Regardless of the format, length, or order of your report, you must still decide how your ideas will be subdivided and developed. Suppose you’re writing on a controversial topic and know that some of your readers will object to your ideas. You wisely decide to use indirect order, but how do you develop your argument? Your job is to choose the most logical argument structure—the one that suits your topic and goals and that makes the most sense to your audience.

However you structure your argument, keep the following points in mind when organizing your report or proposal:

- **Understand and meet audience expectations.** Certain audiences expect or even require a specific organization, and your report might be rejected if it doesn’t meet those requirements. Other audiences leave you room for some flexibility, as long as your report contains the right categories of information. Whenever possible, study an example of a successful report before writing a similar one. Such models will give you a feel not only for organization but also for content, emphasis, and tone.

- **Select a format that’s appropriate to the task.** For reports of five pages or less, a memo or letter (or an electronic equivalent) is often sufficient. For longer reports, you’ll want to include many of the elements of a formal report, which you’ll read about in Chapter 15.

- **Keep it as short as possible.** Reports place enough burden on busy readers already; don’t make the task harder by including unnecessary information or inconsequential details. Your readers will appreciate your brevity, and you’ll stand a better chance of getting your message across.

- **“Talk” your way through your outline.** When you outline your content, use informative (“talking”) headings rather than simple descriptive (“topical”) headings (see Table 13.2). When in question or summary form, informative headings force you to really think through the content rather than simply identifying the general topic area. Using informative headings also facilitates collaborative writing. A heading such as “Industry characteristics” could mean five different things to the five people on your writing team, so use a heading that conveys a single, unambiguous meaning, such as “Flour milling is a mature industry.”

For a quick review of adapting the three-step process to long reports, refer to “Checklist: Adapting the Three-Step Process to Informational and Analytical Reports.” The following sections provide specific advice on how to plan informational reports, analytical reports, and proposals.

**TABLE 13.2** Types of Outline Headings

<table>
<thead>
<tr>
<th>DESCRIPTIVE (TOPICAL) OUTLINE</th>
<th>INFORMATIVE (TALKING) OUTLINE</th>
<th>SUMMARY FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Industry Characteristics</td>
<td>I. What is the nature of the industry?</td>
<td>I. Flour milling is a mature industry.</td>
</tr>
<tr>
<td>A. Annual sales</td>
<td>A. What are the annual sales?</td>
<td>A. Market is large.</td>
</tr>
<tr>
<td>B. Profitability</td>
<td>B. Is the industry profitable?</td>
<td>B. Profit margins are narrow.</td>
</tr>
<tr>
<td>C. Growth rate</td>
<td>C. What is the pattern of growth?</td>
<td>C. Growth is modest.</td>
</tr>
</tbody>
</table>
LEARNING OBJECTIVE

Describe the four major categories of informational reports and provide examples of each.

Informational reports are used to monitor and control operations, to implement policies and procedures, to demonstrate compliance, and to document progress.

CHECKLIST: Adapting the Three-Step Process to Informational and Analytical Reports

A. Analyze the situation.
   • Clearly define your purpose before you start writing.
   • If you need to accomplish several goals in the report, identify all of them in advance.
   • Prepare a work plan to guide your efforts.

B. Gather information.
   • Determine whether you need to launch a separate research project to collect the necessary information.
   • Reuse or adapt existing material whenever possible.

C. Select the right medium.
   • Base your decision on audience expectations (or requirements, as the case may be).
   • Consider the need for commenting, revising, distributing, and storing.
   • Remember that the medium you choose also sends a message.

D. Organize your information.
   • Use a direct approach if your audience is receptive.
   • Use an indirect approach if your audience is skeptical.
   • Use an indirect approach when you don’t want to risk coming across as arrogant.
   • Combine approaches if that will help build support for your primary message.

PLANNING INFORMATIONAL REPORTS

Informational reports provide the information that employees, managers, and others need in order to make decisions and take action. Although dozens of particular formats exist, they can be grouped into four general categories:

- **Reports to monitor and control operations.** Just as doctors rely on medical reports to see how well the various systems in a patient’s body are functioning, business managers rely on a wide range of reports to see how well the various systems inside their companies are functioning. Plans establish expectations and guidelines to direct future action. Plans can range from narrowly focused tactical plans covering short periods to high-level strategic plans that direct organizational activities over the course of several years (see “Creating Successful Business Plans” on page 404). Operating reports provide feedback on a wide variety of an organization’s functions, including sales, inventories, expenses, shipments, and so on. Personal activity reports provide information regarding an individual’s experiences during sales calls, industry conferences, market research trips, and so on.
- **Reports to implement policies and procedures.** Reports are the most common vehicle for conveying guidelines, approved procedures, and other organizational decisions. In some cases, you may write policy reports that are as short as a page or two, such as to share a new procedure with your colleagues. In other cases, the report might be a handbook or policy manual that run dozens or even hundreds of pages, either in print or online. Position papers are a special type of policy report that outlines an individual executive’s (or the entire organization’s) official position on issues that affect a company’s success.
- **Reports to demonstrate compliance.** Even the smallest businesses are required to show that they are in compliance with government regulations of one sort or another. Some compliance reports, such as quarterly and annual tax reports, affect all businesses. Others concern particular industries, companies using hazardous materials, specific professional functions, or other special factors. Compliance reports are usually created in specific formats that must be followed precisely.
- **Reports to document progress.** Supervisors, investors, and customers frequently expect to be informed of the progress of projects and other activities. Progress reports range from simple updates in memo form to comprehensive reports that include such elements as measured progress toward goals, comparisons of budgeted versus actual expenses, and lists of ongoing concerns and risks.

Figure 13.4 shows the major subcategories within each of the major report categories, along with examples of the more common types. Specific titles may change depending on the company you’re with, but chances are you’ll be called upon to read nearly every one of these report types—and to write many of them, too.
Organizational Strategies for Informational Reports

Informational reports can range from extremely positive (such as a report on great sales results) to neutral (a monitoring report that shows business as usual on the factory floor) to extremely negative (a report on customer satisfaction research that ranks the company poorly). Given the range of possibilities, the choice of direct or indirect approach warrants serious consideration before you start outlining in earnest. Because informational reports focus on the straightforward delivery of data and information, the direct approach is common. However, you will encounter situations in which an indirect approach is more effective, such as when you need to build up a series of facts to help your readers understand the main idea of your report.

In one sense, informational reports are the least complicated reports to write because they don’t require analysis or persuasion. Your job is simply to deliver information in an effective and efficient manner. However, that simplicity doesn’t mean that informational reports are necessarily easy to prepare. You still need to evaluate, process, and organize information—sometimes hundreds or thousands of individual facts and figures—in a way that appeals to your audience members and meets their needs. Moreover, because you’re not expected to analyze or persuade in these reports, you must take care to remain objective throughout.

The messages conveyed by informational reports can range from extremely positive to extremely negative, so the approach you take warrants careful consideration.

### FIGURE 13.4 Common Types of Business Reports and Proposals

You will have the opportunity to read and write many types of reports in your career; here are some of the most common.

<table>
<thead>
<tr>
<th>Informational Reports</th>
<th>Analytical Reports</th>
<th>Proposals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer data, facts, feedback, and other types of information, without analysis or recommendations</td>
<td>Offer information and analysis; can also include recommendations</td>
<td>Feature persuasive requests for decisions or action</td>
</tr>
</tbody>
</table>

- **Reports to Monitor and Control Operations**: Provide feedback and other information for decision making (plans, operating reports, personal activity reports).
- **Reports to Implement Policies and Procedures**: Communicate organizational rules and positions (guidelines, position papers).
- **Reports to Demonstrate Compliance**: Provide information to show regulators or other authorities that the company meets formal requirements.
- **Reports to Document Progress**: Provide managers or customers with information on project status.
- **Reports to Assess Opportunities**: Explain the risks and rewards of choosing a course of action (market analysis reports, due diligence reports).
- **Reports to Solve Problems**: Analyze problems and (optionally) suggest solutions (troubleshooting reports, failure analysis reports).
- **Reports to Support Decisions**: Judge the merits of past or future decisions (feasibility reports, justification reports).
- **Internal Proposals**: Request decisions from managers within the organization (funding proposals, general project proposals).
- **External Proposals**: Request decisions from parties outside the organization (investment proposals, grant proposals, sales proposals).
A topical organization is built around the content itself, using such arrangements as comparison, importance, sequence, chronology, spatial orientation, geography, or category.

When writing an informational report, you can let the nature of whatever you’re describing dictate your structure. Informational reports use a topical organization, arranging material according to one of the following topics:

- **Comparison.** If you need to show similarities and differences (or advantages and disadvantages) between two or more entities, organize your report in a way that helps your readers see those similarities and differences clearly.
- **Importance.** If you’re reviewing five product lines, you might organize your study according to the sales for each product line, beginning with the line that produces the most revenue and proceeding to the one that produces the least.
- **Sequence.** If you’re studying a process, discuss it step by step, in sequence.
- **Chronology.** When investigating a chain of events, organize the study according to what happened in January, what happened in February, and so on.
- **Spatial orientation.** If you’re explaining how a physical object works or a physical space looks, describe it from left to right (or right to left in some cultures), top to bottom, or outside to inside—in whatever order makes the most sense; just be consistent.
- **Geography.** If location is important, organize your study according to geography, such as by country or by state.
- **Category.** If you’re asked to review several distinct aspects of a subject, look at one category at a time, such as sales, profit, cost, or investment.

Whichever pattern you choose, use it consistently so that readers can easily follow your discussion from start to finish. Of course, certain reports (such as compliance or monitor-and-control reports) must follow a prescribed flow.

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### Creating Successful Business Plans

The most important report you may ever get the chance to write is the business plan for a new company. A comprehensive business plan forces you to think about personnel, marketing, facilities, suppliers, distribution, and a host of other issues vital to your success. If you are starting out on a small scale and using your own money, your business plan may be relatively informal. But at a minimum, you should describe the basic concept of the business and outline its specific goals, objectives, and resource requirements. A more formal plan, which is an absolute necessity when you want to persuade other people to invest in or join your organization, should cover these points:

- **Summary.** In one or two pages, summarize your business concept. Describe your product or service and its market potential. Highlight some things about your company and its leaders that will distinguish your firm from the competition. Summarize your financial projections and the amount of money investors can expect to make on their investment. Be sure to indicate how much money you will need and where it will be spent.
- **Mission and objectives.** Explain the purpose of your business and what you hope to accomplish—and before you take another step, make sure this is a mission you can pursue with passion, through thick and thin, with every ounce of commitment and energy you can muster.
- **Company and industry.** Give full background information on the origins and structure of your venture and the characteristics of the industry in which you plan to compete.
- **Products or services.** Give a complete but concise description of your products or services, focusing on their unique attributes. Explain how customers will benefit from using your products or services instead of those of your competitors.
- **Market and competition.** Provide data that will persuade investors that you understand your target market and can achieve your sales goals. Be sure to identify the strengths and weaknesses of your competitors.
- **Management.** Summarize the background and qualifications of the key management personnel in your company. Include résumés in an appendix.
Marketing strategy. Provide projections of sales volume and market share, and outline a strategy for identifying and contacting customers, setting prices, providing customer services, advertising, and so forth. Whenever possible, include evidence of customer acceptance, such as advance product orders.

Design and development plans. If your product requires design or development, describe the nature and extent of what needs to be done, including costs and possible problems. For new or unusual products, you may want to explain how the product will be manufactured.

Operations plan. Provide information on facilities, equipment, and personnel requirements.

Overall schedule. Forecast important milestones in the company’s growth and development, including when you need to be fully staffed and when your products will be ready for the market.

Critical risks and problems. Identify all negative factors and discuss them honestly.

Financial projections and requirements. Include a detailed budget of start-up and operating costs, as well as projections for income, expenses, and cash flow for the first few years of business. Identify the company’s financing needs and potential sources, if appropriate.

Exit strategy. Explain how investors will be able to cash out or sell their investment, such as through a public stock offering, sale of the company, or a buyback of the investors’ interest.

A complete business plan obviously requires a considerable amount of work. However, by thinking your way through all these issues, you’ll enjoy a smoother launch and a greater chance of success in your new adventure.

Organizing Website Content

Many websites, particularly company websites, function as informational reports, offering sections with information about the company, its history, its products and services, its executive team, and so on. While most of what you’ve already learned about informational reports applies to website writing, the online experience requires some special considerations and practices.

As you begin to plan a website, start by recognizing the unique nature of online communication:

Web readers are demanding. If your site can’t meet the audience’s needs quickly, they’ll find another site that can. Most visitors won’t bother to dig for information. They scan navigation buttons, headings, images, and hyperlinks, looking for possibilities. If nothing looks promising, they’re gone.

Reading online can be difficult. For most people, reading on a computer monitor is more difficult than reading from the printed page. In fact, studies show that reading speeds are about 25 percent slower on a monitor than on paper. Reading from computer screens can also be tiring on the eyes, even to the point of causing headaches, double vision, blurred vision, and other physical problems.

The web is a nonlinear, multidimensional medium. Readers of online material move around in any order they please; there often is no beginning, middle, or end. As a web writer, you need to anticipate the various paths your readers will want to follow and make sure you provide the right hyperlinks in the right places to help readers explore successfully.

As you move on to define your purpose, bear in mind that most websites have to perform more than one communication function. Consequently, a single website could have a half-dozen purposes or more. Each of these individual purposes needs to be carefully defined and then integrated into a overall statement of purpose for the entire website. Then as you develop the site, you’ll need to clearly identify the specific purpose of each section of the site so that readers always know where to find the information they need.

Just as you probably will have a number of purposes for a single website, you’re likely to have a number of different audiences as well. The global reach of the web further complicates
the audience analysis issue, because you may get visitors from all parts of the world. After you’ve identified your multiple audiences, you then need to analyze each group’s unique information needs, then find a logical way to organize all that material. Professional website designers often use the term information architecture to describe the structure and navigational flow of all the parts of a website. In a sense, the information architecture is a three-dimensional outline of the site, showing (1) the vertical hierarchy of pages from the homepage down to the lower level; (2) the horizontal division of pages across the various sections of the site; and (3) the links that tie all these pages together, both internally (between various pages on the site) and externally (between your site and other sites).

As you develop the site architecture, you can begin to simulate how various audiences will use the site and refine the plan to meet everyone’s needs (see Figure 13.5). For instance, can potential customers find new product information quickly? In contrast, can existing customers get support or warranty information quickly, without wading through pages of promotion for new products? You can also get a sense of how you’ll need to assist visitors who enter the site at points other than the homepage, as often happens with search engine links. Accommodating these multiple entry points is one of the most difficult tasks in site design.

**FIGURE 13.5 Information Architecture**
Anyone searching online for the “Green Goodness” brand of nutritional drink would likely land on this specific product page on the Bolthouse Farms website, rather than landing on the site’s homepage. However, thanks to careful consideration of information architecture, virtually every site visitor can quickly link to the information in which he or she might be interested.
To organize your site effectively, keep the following advice in mind:

- **Plan your navigation first.** Some novice web writers make the mistake of writing a traditional report, then adding some links to make it a website. Websites don’t work that way because readers don’t read that way. They enter your site from an endless variety of other places on the web, with different needs and expectations. To ensure that readers will be able to navigate your document effectively and efficiently, plan your site structure and navigation before you write.9

- **Let your readers be in control.** Most readers want to navigate using paths they establish themselves, so create links and pathways that let them explore on their own. However, doing so doesn’t mean abandoning them to figure out your site by themselves. Help your readers by starting with a homepage that clearly points the way to various sections of the site, then offer plenty of descriptive labels, subheads, and other devices that let readers figure out where to go next.

- **Break your information into chunks.** Help online readers scan and absorb information by breaking it into self-contained, easily readable “chunks” that are linked together logically. Doing so lets you provide comprehensive coverage in a way that is still easy to consume online. For longer sections, consider offering them as downloadable PDF files.

### Effective Informational Reports: An Example

Effective informational reports are clearly and logically organized, with audience-centered content and generous use of previews and summaries. They are complete, without being unnecessarily long or detailed. One of the tasks your audience expects you to accomplish is to sort out the details and separate major points from minor points. In other words, readers expect you to put in all the thought and effort it takes to make the best use of their time. In addition, effective reports are honest and objective but not unduly harsh whenever negative information must be conveyed. Compare the differences between the report versions shown in Figures 13.6 and 13.7.

### PLANNING ANALYTICAL REPORTS

The purpose of analytical reports is to analyze, to understand, to explain—to think through a problem or an opportunity and figure out how it affects the company and how the company should respond. In many cases, you’ll also be expected to make a recommendation based on your analysis. As you saw in Figure 13.4, analytical reports fall into three basic categories:

- **Reports to assess opportunities.** Every business opportunity carries some degree of risk and also requires a variety of decisions and actions in order to capitalize on the opportunity. For instance, *market analysis reports* are used to judge the likelihood of success for new products or sales initiatives by suggesting potential opportunities in a given market and identifying competitive threats and other risks. *Due diligence reports* examine the financial aspects of a proposed decision, such as acquiring another company.

- **Reports to solve problems.** Managers often assign *troubleshooting reports* when they need to understand why something isn’t working properly, from malfunctioning industrial processes to financial disappointments, and what needs to be done to fix it. A variation, the *failure analysis report*, studies events that happened in the past, with the hope of learning how to avoid similar failures in the future.

- **Reports to support decisions.** *Feasibility reports* are called for when managers need to explore the ramifications of a decision they’re about to make (such as replacing an advertising agency or switching materials used in a manufacturing process). *Justification reports* justify a decision that has already been made.

Writing analytical reports presents a greater challenge than writing informational reports, for three reasons. First, you’re doing more than simply delivering information; you’re also thinking through a problem or opportunity and presenting your conclusions. The best
MEMO

DATE: March 14, 2008
TO: Jeff Black and HR staff
FROM: Carrie Andrews
SUBJECT: Recruiting and hiring seminar

Last week I attended an American Management Association seminar on recruiting, screening, and hiring new employees. I got enough useful information to warrant updating our online personnel handbook and perhaps developing a quick training session for all interviewing teams to avoid some of the stupid mistakes we’ve made in the past. Here’s a quick look at the things I learned.

We should avoid legal mistakes, screen and interview applicants more effectively, and measure applicants more accurately. We need to write recruiting ads that accurately portray job openings and that don’t discriminate. We need to sort through résumés more efficiently while still looking for telltale signs of false information. And we need more information on which types of preemployment tests are most effective.

I learned how best to comply with the Americans with Disabilities Act and how to use an employment agency effectively and safely (without risk of legal entanglements). The conference also covered how to screen and interview applicants more effectively, how to avoid interview questions that could get us into legal trouble, and when and how to check criminal records. In addition, I learned which drug-testing issues and recommendations affect us.

As you can see, the seminar addressed a lot of important information. I attended six sessions in all to gather exactly the information we needed. We covered the basic guidelines for much of this already, but a number of specific recommendations and legal concepts should be emphasized. Also, over the 4 day conference, I attended three workshop lunches that addressed specific applications for much of what was presented during the regular sessions. I was amazed by the valuable information I received in addition to the cruise-ship-style buffet lunches. The food was fantastic.

Updating the personnel handbook will take a couple of weeks, but we don’t have any immediate hiring plans. Contact me if you need any information before then.

Everyone will have a lot to review to get up to speed. Also, we have a lot of new information that may well affect our need to train the interviewing team members. Please don’t hesitate to e-mail me or drop by to discuss this matter.
As you all know, the process of recruiting, screening, and hiring new employees presents a number of legal risks. Because we don’t have an in-house lawyer to help us make every decision, it’s important for all of us to be aware of what is legally acceptable and what isn’t.

Last week I attended an American Management Association seminar on this subject. I received enough useful information to warrant updating our online personnel handbook and perhaps developing a quick training session for all interviewing teams. Here’s a quick look at the things I learned.

**AVOIDING LEGAL MISTAKES**
- How to write recruiting ads that accurately portray job openings and that don’t discriminate
- How best to comply with the Americans with Disabilities Act
- How to use an employment agency effectively and safely (without risk of legal entanglements)

**SCREENING AND INTERVIEWING MORE EFFECTIVELY**
- How to sort through résumés more efficiently (including looking for telltale signs of false information)
- How to avoid interview questions that could get us into legal trouble
- When and how to check criminal records

**MEASURING APPLICANTS**
- Which types of pre-employment tests have been proven most effective
- Which drug-testing issues and recommendations affect us

As you can see, the seminar addressed some important topics. Our handbook addresses basic guidelines for much of this already, but it could be improved with a number of specific recommendations and legal concepts.

Updating the personnel handbook will take a couple of weeks, but we don’t have any immediate hiring plans. I’ll keep the seminar handouts and my notes on my desk, in case you want to read them. After I’ve updated the handbook, we can get together and decide whether we need to train the interviewing team members. Although we have a lot of new information, we can highlight what people need to be aware of and let them read the new sections as their schedules allow.

If you have any questions in the meantime, don’t hesitate to e-mail me or drop by my office.
battery is OK but perhaps you’re out of gas. When you speculate on the cause of a problem, you’re forming a hypothesis, a potential explanation that needs to be tested. By subdividing a problem and forming hypotheses based on available evidence, you can tackle even the most complex situations. With a clear picture of the problem or opportunity in mind, you’re ready to consider the best structure for your report.

**Organizational Strategies for Analytical Reports**

To create powerful analytical reports, consider your audience’s likely reaction before choosing the most effective organizational strategy:

- **Receptive audiences.** When you expect your audience to agree with you, use a structure that focuses attention on conclusions and recommendations (direct approach).
- **Skeptical audiences.** When you expect your audience to disagree with you or to be hostile, use a structure that focuses attention on the rationale behind your conclusions and recommendations (indirect approach).

The three most common structural approaches for analytical reports are focusing on conclusions (direct), focusing on recommendations (direct), and focusing on logical arguments (indirect). See Table 13.3.

**Focusing on Conclusions**

When writing an analytical report for people from your own organization who have asked you to study something, you’re writing for your most receptive readers. They may know from experience that you’ll do a thorough job, and they may trust your judgment. If they’re likely to accept your conclusions—whatever they may be—you can structure your report around those conclusions, using a direct approach.

However, focusing directly on conclusions does have potential drawbacks. If your readers have reservations either about you or about your material, strong statements at the beginning may put an audience on the defensive. Also, focusing on conclusions may make everything you say seem too simple. Your readers could criticize your report as being superficial: “Why didn’t you consider this angle?” or “Where did you get this number?” You’re generally better off taking the direct approach in a report only when your credibility is high—when your readers trust you and are willing to accept your conclusions (see Figure 13.8).

You can use a similar structure whether you’re asked to analyze a problem or an opportunity. Readers who are interested mainly in your conclusions can grasp them quickly, and readers who want to know more about your analysis can look at the data you provide.

**TABLE 13.3 Common Ways to Structure Analytical Reports**

<table>
<thead>
<tr>
<th>ELEMENT</th>
<th>FOCUS ON CONCLUSIONS OR RECOMMENDATIONS</th>
<th>FOCUS ON LOGICAL ARGUMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>USE 2 + 2 = 4 MODEL</td>
<td>USE YARDSTICK MODEL</td>
</tr>
<tr>
<td>Readers</td>
<td>Are likely to accept</td>
<td>Hostile or skeptical</td>
</tr>
<tr>
<td>Approach</td>
<td>Direct</td>
<td>Indirect</td>
</tr>
<tr>
<td>Writer credibility</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Advantages</td>
<td>Readers quickly grasp conclusions or recommendations</td>
<td>Works well when you need to show readers how you built toward an answer by following clear logical steps</td>
</tr>
<tr>
<td>Drawbacks</td>
<td>Structure can make topic seem too simple</td>
<td>Can make report longer</td>
</tr>
</tbody>
</table>
Cynthia Zolonka works on the human resources staff of a bank in Houston, Texas. Her company decided to have an outside firm handle its employee training, and a year after the outsourcing arrangement was established, Zolonka was asked to evaluate the results. Her analysis shows that the outsourcing experiment was a success, and she opens with that conclusion but supports it with clear evidence. Readers who accept the conclusion can stop reading, and those who desire more information can continue.

**FIGURE 13.8 Preliminary Outline of a Research Report Focusing on Conclusions**

Opens with the conclusion that the program is a success
Supports the conclusion with evidence from two key areas
Completes the story by highlighting areas that still need improvement

**MEASURING QUALITY IMPROVEMENTS**

I. Introduction

II. Conclusion: Outsourcing employee training has reduced costs and improved quality

III. Cost reductions
   A. Exceeded 15 percent cost-reduction goal with 22 percent savings in first year
   B. Achieved actual reduction of 22 percent
   C. Reassigned three staffers who used to work on training full-time
   D. Reduced management time needed to oversee training
   E. Sold the computers that used to be reserved for training

IV. Quality improvements
   A. Employees say they are more confident in 7 out of 10 key skill areas
   B. Measurable mistakes have dropped by 12 percent

V. Areas needing improvement
   A. Three skill areas still need improvement
   B. Two trainers received approval ratings below 80 percent
   C. Outside trainers aren’t always aware of internal company issues
   D. We have lost some flexibility for scheduling courses

VI. Summary

When readers want to know what you think they should do, organize your report to focus on recommendations.

Whenever a recommendation carries some element of risk, you owe it to your audience to make this clear.

Two common logical patterns are the 2 approach (adding everything up) and the yardstick approach (comparing solutions against criteria).

**Focusing on Recommendations**

In some situations, you’ll be asked to provide advice on solving a problem or approaching an opportunity, rather than simply analyzing it. You can present your recommendations using a series of five steps:

1. Establish or verify the need for action in the introduction, generally by briefly describing the problem or opportunity.
2. Introduce the benefit that can be achieved, without providing any details.
3. List the steps (recommendations) required to achieve the benefit, using action verbs for emphasis.
4. Explain each step more fully, giving details on procedures, costs, and benefits.
5. Summarize your recommendations.

If your recommendation carries any risks, be sure to clearly address those as well. Doing so not only makes your report more ethical but also offers you some protection in the event that your recommendation is implemented but doesn’t work out as you had hoped. In short, make sure your readers know both the potential disadvantages and the potential benefits.

**Focusing on Logical Arguments**

When readers are skeptical or hostile to the conclusion or recommendation you plan to make, use an indirect approach that logically builds toward your conclusion or recommendation. If you guide audience members along a rational path toward the answer, they are more likely to accept it when they encounter it. The two most common logical approaches are known as the \( 2 + 2 = 4 \) approach and the yardstick approach.
The 2 + 2 = 4 Approach  The 2 + 2 = 4 approach is so named because it convinces readers of your point of view by demonstrating that everything adds up. The main points in your outline are the main reasons behind your conclusions and recommendations. You support each reason with the evidence you collected during your analysis.

Because of its natural feel and versatility, the 2 + 2 = 4 approach is generally the most persuasive and efficient way to develop an analytical report for skeptical readers. When organizing your own reports, try this structure first. You’ll find that many business situations lend themselves nicely to this pattern of logical argumentation.

The Yardstick Approach  The yardstick approach is useful when you need to use a number of criteria to evaluate one or more possible solutions. These criteria become the “yardstick” by which you measure the various alternatives. With this approach, you begin by discussing the problem or opportunity, then list the criteria that will guide the decision. The body of the report then evaluates the alternatives against those criteria. The main points of the outline are either the criteria themselves or the alternatives (see Figure 13.9).

The yardstick approach is particularly useful for proposals when the audience has provided a list of criteria the solution must meet. Say that your company has been asked to bid on a contract to design and install a factory-floor distribution system for a large corpora-

**FIGURE 13.9 Outline of an Analytical Report Using the Yardstick Approach**

This outline was prepared by J. C. Hartley, a market analyst for a large Sacramento company that makes irrigation equipment for farms and ranches. “We’ve been so successful in the agricultural market that we’re starting to run out of customers to sell to,” says Hartley. “To keep the company growing, we needed to find another market. Two obvious choices to consider were commercial buildings and residences,” so she structured her report to compare these two opportunities.

Main Idea: We should move into the commercial irrigation equipment market but not into the residential market.

I. Introduction

II. Criteria for entering new markets
   A. Size and growth
   B. Profit potential
   C. Ability to compete
   D. Distribution costs and opportunities
   E. Fit with current capabilities

III. Irrigation equipment trends
   A. Water shortages leading to demand for more efficient irrigation
   B. Labor costs encouraging automation
   C. More homeowners attempting do-it-yourself projects

IV. Comparison of new market opportunities
   A. Commercial landscapers and building owners
      1. Size and growth
      2. Profit potential
      3. Ability to compete
      4. Distribution costs and opportunities
      5. Fit with current capabilities
   B. Residential landscapers and homeowners
      1. Size and growth
      2. Profit potential
      3. Ability to compete
      4. Distribution costs and opportunities
      5. Fit with current capabilities

V. Recommendations
   A. Enter the commercial segment
      1. Select a test market
      2. Learn from the test and refine our approach
      3. Roll out product marketing nationwide
   B. Do not attempt to enter the residential market at this point
The client has listed the requirements (criteria) for the system, and you’ve developed a preliminary design to meet them. In the body of your proposal, you could use the client’s list of requirements as the main headings and under each one explain how your preliminary design meets the requirement.

The yardstick approach has two potential drawbacks. First, your audience members need to agree with the criteria you’re using in your analysis. If they don’t, they won’t agree with the results of the evaluation. If you have any doubt about their agreement, build consensus before you start your report, if possible, or take extra care to explain why the criteria you’re using are the best ones in this particular case. Second, the yardstick approach can get a little boring when you have many options to consider or many criteria to compare them against. One way to minimize the repetition is to compare the options in tables and then highlight the more unusual or important aspects of each alternative in the text so that you get the best of both worlds. This approach allows you to compare all the alternatives against the same yardstick while calling attention to the most significant differences among them.

Effective Analytical Reports: An Example

As national sales manager of a New Hampshire sporting goods company, Binh Phan was concerned about his company’s ability to sell to its largest customers. His boss, the vice president of marketing, shared these concerns and asked Phan to analyze the situation and recommend a solution. As Phan says, “We sell sporting goods to retail chains across the country. Large nationwide chains of superstores have been revolutionizing the industry, but we haven’t had as much success with these big customers as we’ve had with smaller companies that operate strictly on a local or regional basis. With more and more of the industry in the hands of the large chains, we knew we had to fix the situation.”

Phan’s troubleshooting report appears in Figure 13.10. The main idea is that the company should establish separate sales teams for these major accounts, rather than continuing to service them through the company’s four regional divisions. However, Phan knew his plan would be controversial because it required a big change in the company’s organization and in the way sales reps are paid. His thinking had to be clear and easy to follow, so he used the $2 + 2 = 4$ approach to focus on his reasons.

PLANNING PROPOSALS

The specific formats for proposals are innumerable, but they can be grouped into two general categories. Internal proposals request decisions from managers within the organization, such as proposals to buy new equipment or launch new research projects. External proposals request decisions from parties outside the organization. Examples include investment proposals, which request funding from external investors; grant proposals, which request funds from government agencies and other sponsoring organizations; and sales proposals, which suggest individualized solutions for potential customers and request purchase decisions.

Regardless of the audience, the most significant factor in planning a proposal is whether the recipient has asked you to submit a proposal. Solicited proposals are generally prepared at the request of external parties that require a product or a service, but they may also be requested by such internal sources as management or the board of directors. When organizations require complex products, services, or systems, they often prepare a formal invitation to bid on the contract, called a request for proposal (RFP), which includes instructions that specify the exact type of work to be performed or products to be delivered, along with budgets, deadlines, and other requirements. For example, when the National Aeronautics and Space Administration (NASA) wants to develop a new satellite, it prepares an RFP that specifies exactly what the satellite should accomplish and sends the RFP to several aerospace companies, inviting them to bid on the job. You respond to RFPs by preparing a proposal that shows how you would meet the potential customer’s needs. Responding to RFPs can be a significant task; fortunately, new software products are available to lighten the load considerably (see “Connecting with Technology: Proposals Get a Software Assist”).

Buyers often solicit proposals by publishing a request for proposals (RFP).
To attract a large pool of qualified bidders, organizations send RFPs to firms with good performance records in the field, print them in trade publications, or post them on the web. Federal government RFPs, for instance, can be found through Commerce Business Daily at www.cbd-net.com. Regardless of how you obtain an RFP, you and your company must decide whether you’re interested in the contract and whether you have a reasonable chance of winning it (because responding to each RFP can take weeks or months of work). When the proposal effort actually begins, you review the requirements; define the scope of the deliverables; determine the methods and procedures to be used; and estimate time requirements, personnel requirements, and costs. Then you put it all in writing—exactly as specified in the RFP, following the exact format it requires and responding meticulously to every point it raises. Unsolicited proposals can seem surprisingly picky, even to the point of specifying the paper size to use and the number of copies to send, but you must follow every detail.

Unsolicited proposals are created by organizations attempting to obtain business or funding without a specific invitation from a potential client. Such proposals may also be initiated by employees or managers who want to convince company insiders to adopt a program, policy, or idea. In other words, with an unsolicited proposal, the writer makes the first
For example, having retail outlets across the lower tier of the country, AmeriSport received pitches from reps out of our West, South, and East regions. Because our regional offices have a lot of negotiating freedom, the three were offering different prices. But all AmeriSport buying decisions were made at the Tampa headquarters, so all we did was confuse the customer. The irony of the current organization is that we’re often giving our weakest selling and support efforts to the largest customers in the country.

COMMISSION PROBLEMS

The regional organization problems are compounded by the way we assign commissions and quota credit. Salespeople in one region can invest a lot of time in pursuing a sale, only to have the customer place the order in another region. So some sales rep in the second region ends up with the commission on a sale that was partly or even entirely earned by someone in the first region. Therefore, sales reps sometimes don’t pursue leads in their regions, thinking that a rep in another region will get the commission.

For example, Athletic Express, with outlets in 35 states spread across all four regions, finally got so frustrated with us that the company president called our headquarters. Athletic Express has been trying to place a large order for tennis and golf accessories, but none of our local reps seem interested in paying attention. I spoke with the rep responsible for Nashville, where the company is headquartered, and asked her why she wasn’t working the account more actively. Her explanation was that last time she got involved with Athletic Express, the order was actually placed from their L.A. regional office, and she didn’t get any commission after more than two weeks of selling time.

RECOMMENDATIONS

Our sales organization should reflect the nature of our customer base. To accomplish that goal, we need a group of reps who are free to pursue accounts across regional borders—and who are compensated fairly for their work. The most sensible answer is to establish a national account group. Any customers whose operations place them in more than one region would automatically be assigned to the national group.

In addition to solving the problem of competing sales efforts, the new structure will also largely eliminate the commission-splitting problem because regional reps will no longer invest time in prospects assigned to the national accounts team. However, we will need to find a fair way to compensate regional reps who are losing long-term customers to the national team. Some of these reps have invested years in developing customer relationships that will continue to yield sales well into the future, and everyone I talked to agrees that reps in these cases should receive some sort of compensation. Such a “transition commission” would also motivate the regional reps to help ensure a smooth transition from one sales group to the other. The exact nature of this compensation would need to be worked out with the various sales managers.

SUMMARY

The regional sales organization is effective at the regional and local levels but not at the national level. We should establish a national accounts group to handle sales that cross regional boundaries. Then we’ll have one set of reps who are focused on the local and regional levels and another set who are pursuing national accounts.

To compensate regional reps who lose accounts to the national team, we will need to devise some sort of payment to reward them for the years of work invested in such accounts. This can be discussed with the sales managers once the new structure is in place.
Proposals Get a Software Assist

Writing a new-business proposal should be an exciting time: a new opportunity is waiting for you, just out of reach. All you have to do is craft a document that explains how your company can meet customer needs better than anyone else, and the business is yours.

However, most businesspeople find proposal writing to be less than a wonderful opportunity and more of a chore. First of all, complicated proposals can involve dozens or even hundreds of detailed discussion points. In addition, the need to write a proposal is often unexpected, which means that you have to make room in your already-busy schedule. Also, deadlines are usually inflexible, which creates frequent last-minute rushes. To top it off, many proposals require similar information, so you end up writing the same thing, or nearly the same thing, over and over again.

Yet many companies live and die by proposals, so the chore of writing them is an ongoing part of doing business. Fortunately, a number of software companies have jumped in with promises to help beleaguered proposal writers. At the simplest level, you can use templates and cut-and-paste boilerplate text in your word processor. This method reduces the typing, but doing all this insertion manually is still tedious. Also, the possibility of errors is quite high (such as when you reuse an existing proposal and forget to change the name of the customer). Moreover, every time you need a new piece of information, you still need to track down the right expert in your company, draft the new material, then weave it into the proposal document.

Automated proposal solutions promise to solve all of these problems to one degree or another. Basic features include the ability to automatically personalize the proposal, ensure proper structure (making sure you don’t forget any sections, for instance), and organize storage of all your boilerplate text. At a more advanced level, products such as Pragmatech’s RFP Machine and Sant’s RFPMaster can scan RFPs to identify questions and requirements, and then fill in potential answers from a centralized knowledge base that contains input from all the relevant experts in your company. Ideally, your job is then reduced to verifying the answers, modifying or replacing any that aren’t quite right, and adding any personalized touches that are beyond the system’s abilities. With these tools at hand, you can spend a little more time profiting from that new business and less time struggling to get it.

CAREER APPLICATIONS

1. Research three commercially available software products that assist with proposal writing, then explain which one you think would be best for a small consulting firm.
2. Can you envision any disadvantages to using proposal-writing software? If so, how might you overcome them?

Organizational Strategies for Proposals

Your choice of structure for proposals depends on whether your audience members expect the proposal and, if they do, whether you expect them to be receptive. In general,
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your audience may be more receptive with solicited proposals, because the problem and the solution have already been identified. Submit your proposal for the solution specified in the RFP, and structure the proposal using a direct approach that focuses on your recommendation.

Depending on the circumstances and your relationship with the recipient, the indirect approach may be a better choice for unsolicited proposals. When writing unsolicited proposals, you must first convince the audience that a problem exists and establish your credibility if you are unknown to the reader. To convince the reader that your recommendations are solid and logical, you unfold your solution to the problem using the $2 + 2 = 4$ approach or the yardstick approach. As you unfold your solution, you have two goals: to persuade readers to accept your idea and award you a contract, and to spell out the terms of your proposal.

Effective Proposals: An Example

A good proposal explains why a project or course of action is needed, what it will involve, how much it will cost, and how the recipient will benefit. You can see all of these elements in Shandel Cohen’s internal proposal for an automatic mail-response system (see Figure 13.11, on pages 418–419).

Cohen manages the customer-response section of the marketing department at a Midwest personal computer manufacturer. Her section sends out product information requested by customers and the field salesforce. Cohen has observed that the demand for information increases when a new product is released and that it diminishes as a product matures. This fluctuating demand causes drastic changes in her section’s workload.

“Either we have more work than we can possibly handle,” says Cohen, “or we don’t have enough to keep us busy. But I don’t want to get into a hiring-and-firing cycle.” Cohen is also concerned about the amount of printed material that’s discarded when products are upgraded or replaced. Her report describes the problem, her proposed solutions, the benefits to the company, and the projected costs, giving her audience all the information needed to make a decision.

COMMUNICATION CHALLENGES AT KENWOOD USA

You’ve joined Keith Lehmann’s team at Kenwood as a consumer electronics business and marketing analyst. Kenwood’s product portfolio in mobile electronics now includes not only satellite radio but also conventional cassette and CD players, video players, and navigation systems. Use your knowledge of business communication and report writing to address these challenges.

Individual Challenge: One of the latest mobile electronics innovations is onboard, high-speed Internet access for cars and trucks. KVH Industries (www.kvh.com) is an early leader in this segment. Its products provide Internet access on any television displays in the vehicle and even include a wireless hub that allows anyone in the vehicle to connect a laptop PC, PDA, or other wireless device to the Internet. In addition to commercial drivers (particularly long-distance truck drivers), families who like to take long road trips are an obvious target audience for such a system. You plan to ask the product design team in Japan to explore the feasibility of creating a system for Kenwood, but you want to make sure the designers have a clear picture of the U.S. consumer market. Draft a one- or two-page informational report that describes typical vacation scenarios involving families who might be interested in purchasing a mobile Internet system from Kenwood. Be sure to give the designers a clear and vivid picture of what family road trips are like in the United States, from the types of vehicles used to the wide variety of vacation destinations. You want them to accurately visualize what such a vacation would be like, even if they’ve never spent much time in the United States.

Team Challenge: You would also like the design team to have a solid assessment of strengths and potential weaknesses of the systems offered by KVH Industries. With your team, review the material on the KVH website and look for product reviews elsewhere online. Draft a short analytical report that summarizes what you’ve learned about the KVH product line, what its strengths and weaknesses appear to be, and what sort of product Kenwood might want to develop in order to compete with KVH. Feel free to use your imagination to create any information you might need to describe the future KVH product.
DATE: July 8, 2008
TO: Jamie Engle
FROM: Shandel Cohen
SUBJECT: Saving $145k/year with an automated e-mail response system

THE PROBLEM:
Expensive and Slow Response to Customer Information Requests

Our new product line has been very well received, and orders have surpassed our projections. This very success, however, has created a shortage of printed brochures, as well as considerable overtime for people in the customer response center. As we introduce upgrades and new options, our printed materials quickly become outdated. If we continue to rely on printed materials for customer information, we have two choices: Distribute existing materials (even though they are incomplete or inaccurate) or discard existing materials and print new ones.

THE SOLUTION:
Automated E-Mail Response System

With minor additions and modifications to our current e-mail system, we can set up an automated system to respond to customer requests for information. This system can save us time and money and can keep our distributed information current.

Automated e-mail response systems have been tested and proven effective. Many companies already use this method to respond to customer information requests, so we won’t have to worry about relying on untested technology. Using the system is easy, too: Customers simply send a blank e-mail message to a specific address, and the system responds by sending an electronic copy of the requested brochure.

Benefit #1: Always-Current Information
Rather than discard and print new materials, we would only need to keep the electronic files up to date on the server. We could be able to provide customers and our field sales organization with up-to-date, correct information as soon as the upgrades or options are available.

Benefit #2: Instantaneous Delivery
Almost immediately after requesting information, customers would have that information in hand. Electronic delivery would be especially advantageous for our international customers. Regular mail to remote locations sometimes takes weeks to arrive, by which time the information may already be out of date. Both customers and field salespeople will appreciate the automatic e-mail-response system.

Benefit #3: Minimized Waste
With our current method of printing every marketing piece in large quantities, we discard thousands of pages of obsolete catalogs, data sheets, and other materials every year. By maintaining and distributing the information electronically, we would eliminate this waste. We would also free up a considerable amount of expensive floor space and shelving that is required for storing printed materials.

(continued)
Of course, some of our customers may still prefer to receive printed materials, or they may not have access to electronic mail. For these customers, we could simply print copies of the files when we receive such requests. The new Xerox DocuColor printer just installed in the Central Services building would be ideal for printing high-quality materials in small quantities.

**Benefit #4: Lower Overtime Costs**

In addition to saving both paper and space, we would also realize considerable savings in wages. Because of the increased interest in our new products, we must continue to work overtime or hire new people to meet the demand. An automatic mail-response system would eliminate this need, allowing us to deal with fluctuating interest without a fluctuating workforce.

**Cost Analysis**

The necessary equipment and software costs approximately $15,000. System maintenance and upgrades are estimated at $5,000 per year. However, those costs are offset many times over by the predicted annual savings:

- **Printing**: $100,000
- **Storage**: $25,000
- **Postage**: $5,000
- **Wages**: $20,000

**Total**: $150,000

Based on these figures, the system would save $130,000 the first year and $145,000 every year after that.

**CONCLUSION**

An automated e-mail response system would yield considerable benefits in both customer satisfaction and operating costs. If you approve, we can have it installed and running in 6 weeks. Please give me a call if you have any questions.
defining what you’re going to investigate; (2) a statement of purpose defining why you are preparing the report; (3) the tasks to be accomplished and the sequence in which they should be performed; (4) a description of any product that will result from your study; (5) a review of responsibilities, assignments, schedules, and resource requirements; (6) plans for following up after delivering the report; and (7) a working outline.

4 Describe the four major categories of informational reports and provide examples of each. Informational reports include reports for monitoring and controlling operations, such as plans, operating reports, and personal activity reports; reports for implementing policies and procedures, such as policy reports and position papers; reports to demonstrate compliance, such as quarterly and annual income tax reports; and reports to document progress, such as status reports and lists of project risks and concerns.

5 List the key elements of a business plan. Formal business plans, those that are shown to outside audiences such as investors and bankers, typically contain the following elements: a summary of the business concept, the company’s mission and objectives, background on the company and the industry in which it competes, descriptions of its products and services, an analysis of target markets and key competitors, a discussion of the management team, a summary of the marketing strategy, descriptions of the company’s products and services, an analysis of its markets and key competitors, a discussion of the management team, a summary of the marketing strategy, and a description of the proposed exit strategy.

6 Identify three steps you can take to ensure effective organization of online reports and other website content. To help ensure effective organization of both online reports and websites in general, start by planning the structure and navigation paths before writing the content. Next, make sure you let readers be in control. Give them plenty of navigational flexibility so they can create their own paths according to the information they find interesting and useful. Don’t force them to follow a rigid page-by-page scheme. Last, break your information into chunks that can be scanned and absorbed quickly.

7 Describe the three major categories of analytical reports and provide examples of each. The most common analytical reports are those written to assess opportunities, such as market analysis and due diligence reports; reports written to solve problems, including troubleshooting and failure analysis reports; and reports to support decisions, including feasibility and justification reports.

8 Discuss three major ways to organize analytical reports. The three most common ways to organize analytical reports are by focusing on conclusions, focusing on recommendations, and focusing on logical arguments.

9 Explain how your approach to writing proposals should differ when you are responding to a formal request for proposals (RFP). The most important point to consider when responding to an RFP is to follow the RFP’s instructions down to the tiniest detail, because any deviation could be grounds for rejecting your proposal. With unsolicited proposals, you can have a considerable degree of freedom in deciding what information to include and how to organize it. However, when responding to an RFP, you must provide all the information requested and follow the organizational scheme dictated by the RFP.

Test Your Knowledge

1. How can your written reports influence your professional success?
2. What is the major difference between informational and analytical reports?
3. What does a statement of purpose convey?
4. What should you include in the work plan for a complex report or proposal?
5. How can you determine the best medium to use for a report?
6. How are reports for monitoring and controlling operations used?
7. What are the seven major ways to organize an informational report?
8. How does a feasibility report differ from a justification report?
9. What is problem factoring?
10. What is an RFP and how does it relate to proposal writing?
13.2 Understanding Business Reports and Proposals: Report Classification

Using the information presented in this chapter, identify the report type represented by each of the following examples. In addition, write a brief paragraph about each, explaining who the audience is likely to be, what type of data would be used, and whether conclusions and recommendations would be appropriate.

a. A statistical study of the pattern of violent crime in a large city during the last five years
b. A report prepared by a seed company demonstrating the benefits of its seed corn for farmers
c. A report prepared by an independent testing agency evaluating various types of nonprescription cold remedies
d. A trip report submitted at the end of a week by a traveling salesperson
e. A report indicating how 45 acres of undeveloped land could be converted into an industrial park
f. An annual report to be sent to the shareholders of a large corporation
g. A report from a U.S. National Park wildlife officer to Washington, D.C., headquarters showing the status of the California condor (an endangered species)
h. A report outlining the risks of closing a chain of retail stores and moving the entire business online

13.3 Internet

Follow the step-by-step hints and examples for writing a funding proposal at www.learnerassociates.com/proposal. Review the writing hints and the entire sample proposal online. What details did the author decide to include in appendixes? Why was this material placed in the appendixes and not the main body of the report? According to the author’s tips, when is the best time to prepare a project overview?


You’re the vice president of operations for a Florida fast-food chain. In the aftermath of a major hurricane, you’re drafting a report on the emergency procedures to be followed by personnel in each restaurant when storm warnings are in effect. Answer who, what, where, when, why, and how, and then prepare a one-page outline of your report. Make up any details you need.

13.5 Unsolicited Proposal

You’re getting ready to launch a new lawn-care business that offers mowing, fertilizing, weeding, and other services. The lawn surrounding a nearby shopping center looks as if it could use better care, so you target that business for your first unsolicited proposal. To help prepare this proposal, write your answers to these questions:

a. What questions will you need to answer before you can write a proposal to solve the reader’s problem? Be as specific as possible.

b. What customer benefits will you include in your proposal?

c. Will you use a letter or memo format for your proposal? Explain your answer.

13.6 Teamwork: Unsolicited Proposal

Break into small groups and identify an operational problem occurring at your campus involving one of the following: registration, university housing, food services, parking, or library services. Then develop a workable solution to that problem. Finally, develop a list of pertinent facts that your team will need to gather to convince the reader that the problem exists and that your solution will work.

13.7 Analyzing the Situation: Statement of Purpose

Sales at The Style Shop, a clothing store for men, have declined for the third month in a row. Your boss is not sure whether this decline is because of a weak economy or if it’s because of another unknown reason. She has asked you to investigate the situation and to submit a report to her highlighting some possible reasons for the decline. Develop a statement of purpose for your report.

13.8 Preparing the Work Plan

Using the situation described in Exercise 13.5, assume that you’re the shopping center’s facilities manager. You report to the general manager, who must approve any new contracts for lawn service. Before you contract for lawn care, you want to prepare a formal study of the current state of your lawn’s health. The report will include conclusions and recommendations for your boss’s consideration. Draft a work plan, including the problem statement, the statement of purpose and scope, a description of what will result from your investigation, the sources and methods of data collection, and a preliminary outline.
13.9 Organizing Reports: Choosing the Direct or Indirect Approach

For each of the following scenarios, explain why a direct or indirect approach would be advisable.

a. The monthly financial report, prepared by the accounting department for upper management

b. An accountant fresh out of college who wants to propose a new way to present those monthly financial results to upper management

c. An unsolicited proposal to provide payroll processing services

d. An analytical report, requested by the CEO, explaining why the company has been losing money in the eastern sales region for the past two years

e. An unsolicited proposal to the board of directors, outlining why it makes strategic sense for your company to expand into international markets; the board rejected a similar—but poorly presented—idea last year

13.10 Choosing the Direct or Indirect Approach

Look through recent issues (print or online) of *BusinessWeek*, *Fortune*, or other business publications for an article that describes how an executive’s conclusions about his or her company’s current situation or future opportunities led to changes in policy, plans, or products. Construct an outline of the material, first using a direct approach then using an indirect approach. Which approach do you think the executive would use when reporting these conclusions to stockholders? When reporting to other senior managers? Explain your answers.

13.11 Organizing Reports: Deciding on Format

Go to the library or visit the Internet site [www.annualreportservice.com](http://www.annualreportservice.com) and review the annual reports recently released by two corporations in the same industry. Analyze each report and be prepared to discuss the following questions in class:

a. What organizational differences, if any, do you see in the way each corporation discusses its annual performance? Are the data presented clearly so that shareholders can draw conclusions about how well the company performed?

b. What goals, challenges, and plans do top managers emphasize in their discussion of results?

c. How do the format and organization of each report enhance or detract from the information being presented?

13.12 Organizing Reports: Structuring Informational Reports

Assume that your college president has received many student complaints about campus parking problems. You are appointed the chair of a student committee organized to investigate the problems and recommend solutions. The president gives you the file labeled “Parking: Complaints from Students,” and you jot down the essence of the complaints as you inspect the contents. Your notes look like this:

- Inadequate student spaces at critical hours
- Poor night lighting near the computer center

Prepare an outline for an informational report to be submitted to committee members. Use a topical organization that categorizes this information.

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**Portfolio BUILDER**

13.13 Organizing Reports: Structuring Analytical Reports

Three years ago, your company (a carpet manufacturer) modernized its Georgia plant in anticipation of increasing demand for carpets. Because of the depressed housing market, the increase in demand for new carpets has been slow to materialize. As a result, the company has excess capacity at both its Georgia and California plants. On the basis of your research, you have recommended that the company close the California plant. The company president, J. P. Lawrence, has asked you to prepare a justification report to support your recommendation. Here are the facts you gathered by interviewing the respective plant managers:

**Operational Statistics**

- Georgia plant: This plant has newer equipment, has higher productivity, employs 100 nonunion production workers, and ships $12 million in carpets a year. Hourly base wage is $16.
- California plant: California plant employs 80 union production workers and ships $8 million in carpets a year. Hourly base wage is $20.

**Financial Implications**

- Savings by closing California plant: (1) Increase productivity by 17 percent; (2) reduce labor costs by 20 percent (total labor savings would be $1 million per year; see assumptions); (3) annual local tax savings of $120,000 (Georgia has a more favorable tax climate).
- Sale of Pomona, California, land: Purchased in 1952 for $200,000. Current market value $2.5 million. Net profit (after capital gains tax) over $1 million.
- Sale of plant and equipment: Fully depreciated. Any proceeds a windfall.
- Costs of closing California plant: One-time deductible charge of $250,000 (relocation costs of $100,000 and severance payments totaling $150,000).
Assumptions

- Transfer five workers from California to Georgia.
- Hire 45 new workers in Georgia.
- Lay off 75 workers in California.
- Georgia plant would require a total of 150 workers to produce the combined volume of both plants.

a. Which approach (focus on conclusions, recommendations, or logical arguments) will you use to structure your report to the president? Why?

b. Suppose this report were to be circulated to plant managers and supervisors instead. What changes, if any, might you make in your approach?

c. List some conclusions that you might draw from the preceding information to use in your report.

d. Using the structure you selected for your report to the president, draft a final report outline with first- and second-level informative headings.

Surfing Your Way to Career Success

Bovée and Thill’s Business Communication Resources offers links to hundreds of online resources that can help you with this course, your other college courses, and your career. Visit www.buscommresources.com, then click on “Business Communication Web Directory.” The “Reports, Proposals, and Business Plans” section connects you to a variety of websites and articles on these important topics, as well as sites on designing and producing visual material to supplement your reports. Identify three websites from this section that could be useful in your business career. For each site, write a two-sentence summary of what the site offers and how it could help you launch and build your career.

Learn Interactively

Interactive Study Guide

Visit www.prenhall.com/bovee, then locate your book and click on its “Companion Website” link. Select Chapter 13 to take advantage of the interactive “Chapter Quiz” to test your knowledge of chapter concepts. Receive instant feedback on whether you need additional studying. Also, visit the “Study Hall,” where you’ll find an abundance of valuable resources that will help you succeed in this course.

Peak Performance Grammar and Mechanics

If your instructor has required the use of “Peak Performance Grammar and Mechanics,” either in your online course or on CD, you can continue to improve your skill with apostrophes, quotation marks, parentheses and brackets, question marks and exclamation points, dashes, hyphens, and ellipses by using the “Peak Performance Grammar and Mechanics” module. Click “Punctuation,” and then click “Punctuation II.” Take the Pretest to determine whether you have any weak areas. Then review those areas in the Refresher Course. Take the Follow-Up Test to check your grasp of these elements. For an extra challenge or advanced practice, take the Advanced Test. Finally, for additional reinforcement in commas, visit the Companion Website, click on any chapter, then click on “Improve Your Grammar, Mechanics, and Usage.”