

STEPHEN YORK EDITORIAL SERVICES

Factsheet 1: Writing reports

This article on writing reports appeared on my website blog in 2016 in three parts under Tips for writers. The parts are reproduced here as they appeared.

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PART 1: HOW TO IMPROVE VISUAL APPEARANCE

In their headlong rush to communicate as much information and data as possible to their readers, many authors of reports often neglect to pay sufficient attention to *how* they communicate the facts and figures to their audience.

Some of the factors that lead to poor-quality output include:

- cluttered and fussy visual appearance
- inconsistencies of style
- poor presentation of data.

In this first part I will concentrate on visual appearance.

Visual appearance

An easily readable document is vital – it gives the impression of good organization and that you have set out your points and arguments clearly, that you are professional, clear thinking, and authoritative. This can be achieved through:

Margins

Leave wide margins so there is plenty of ‘white space’. This will focus attention on the text. Use an unjustified (unaligned) right-hand margin, which makes the text look friendlier and approachable, and avoids the problems of wide word spacing and end-of-line word divisions that can occur with justified (aligned) text.

Spacing

Consider using one-and-a-half or two-line spacing – the less text there is on a page the easier the reader can concentrate on it.

Headings

Use these to break up the page into smaller chunks for reading. If the reader is short of time they can skim the document to get the gist, or just concentrate on

those sections they are interested in. They also help the reader refer back to a previous section to clarify a point. Also use subheadings whenever it would be useful.

Sections

In a long and complicated document, it is often useful to summarize each section rather than have one gigantic summary at the end of the document. Sections can be numbered if the sequence is simple and logical, but using too many numbers can cause confusion.

Paragraphs

Use a fresh paragraph for each new point or thought and try to limit the length of each paragraph to three or four sentences. Rather than indenting a new paragraph on the next text line it is more visually appealing to have a line space between paragraphs.

Lists

These are a useful way to set out a collection of facts or points rather than them being lost in the main text. They can be of various styles such as round or square bullets, numbers (either roman or Arabic), dashes, or icons. However, do not get carried away using several styles where two would suffice – for main levels and sublevels.

Fonts

Stick to one main font or typeface for text and headings, although using a second font for headings and other special features can add to visual appeal. For instance, a sans serif font such as Arial could be used for text and a serif font such as Times New Roman could be used for headings. Others might suggest the other way round. Just because your word-processing program has numerous features and options does not mean you have to use them all in the same document!

In part 2 I will look at using a consistent style, and part 3 will consider the presentation of data.

PART 2: HOW TO ACHIEVE CONSISTENCY OF STYLE

In [part 1 of Writing reports](#) I discussed the importance of creating a simple and appealing visual appearance using several techniques, and in part 2 I discuss consistency of style.

It is important to maintain a consistent style so as not to confuse or annoy the reader. By 'style' I mean the following factors:

Spelling

The pattern of spelling should be either British (UK) English or US English. However, if say you are writing in UK English it is only permissible to use US spellings in quoted material.

Also, be consistent in the use of -ise or -ize spellings, such as in recognise or recognize, and organise or organize. It is a mistake to assume that -ise spellings are used in UK English and -ize spellings are used only in US English. While US English uses -ize spellings (with a few exceptions for certain words such as advertise, improvise, and televise), UK English can use either style of spelling and some publishers have a preference – such as Oxford University Press favouring -ize spellings. If using UK English be consistent in your choice of spelling, using either the -ise or the -ize patterns, but not both.

Certain words can be spelt in different ways, such as adviser or advisor, focused or focussed, and judgement or judgment. Be sure to select the appropriate version and stick to it.

Punctuation

Whether you use UK or US English will determine which punctuation style you use. The main difference is in the use of the comma or full stop – generally, they will be placed outside of closing quotation marks in UK English for partial sentences quoted, and inside for US English. There are other differences that can be checked using [New Hart's Rules](#) for UK English and [The Chicago Manual of Style](#) for US English.

Capitalization

Current writing style favours the use of minimum capital letters – overuse of capital or upper case letters can give text a cluttered appearance and make it more difficult to read. I have already covered this in a previous blog on [overcapitalization](#). There might be exceptions to the trend for minimum capital letters – for instance, a company's house style might call for initial capital letters for titles of personnel and special terms in a company's annual report, such as:

- Annual General Meeting
- Board
- Chairman (and if capitalized, should it be Chair or Chairperson to avoid sexist language?)
- Company
- Director
- Non-Executive Director
- Ordinary Shares
- Preference Shares

Whatever is the preferred style its use should be consistent.

Numbers and dates

Be consistent in their use, such as:

- How should dates be presented? 30 September 20XX, 30th September 20XX, 30 Sept 20XX, 30/09/20XX? There are several more possible versions.
- Should you use full or contracted years in ranges, such as 2009–2010, 2009–10, or 2009/10?
- Do you use words for numbers one to ten and numerals for numbers 11 upwards?
- Should % or per cent be used?
- Should p or pence be used?
- Should it be million or mn or m, billion or bn or b?

In part 3 I will consider presentation of data.

PART 3: HOW TO PRESENT DATA

In [part 1 of Writing reports](#) I discussed the importance of creating a simple and appealing visual appearance using several techniques, and in [part 2](#) I discussed consistency of style.

In this final part I will discuss how to present data. Lack of space prevents a full analysis of the ways to present textual and numerical data, so the following is just a brief summary.

Tables

The use of tables can avoid repeating the same phrases or units of measurement as column headings can be used for this purpose – for instance a table of numerical values can have m² (for square metres) and % (for per cent) in the headings to avoid them being repeated on each line of text within the table, or within ordinary text. Separate lines can be used for different categories, such as departments or regions.

Graphs, charts and diagrams

A wealth of material can be presented in pictorial form, which is often easier and quicker to take in, and more easily understood and remembered than a mass of text.

- Graphs can be in the form of bar charts – horizontal or vertical bars to plot values to show changes over a period, geographical distribution, etc., or line charts to plot similar data.
- Dot charts can be used to plot correlations with or variances from a plotted line.
- Pie charts can be used to show proportions of a round, two-dimensional, segmented circle, or as a slice being lifted from a 'pie' three-dimensionally.
- Flow charts can be used to demonstrate the stages in a process and organization charts to document the various personnel and departments and how they interact in a business or organization.

Microsoft Word and Excel programs have facilities to insert graphs, charts, and diagrams (GCDs) into text and should be used to add colour and depth to reports as much as possible.

Boxes

These are useful for specialized data or text such as case studies and can be formatted differently than the main text.

Appendices

It is important to include hard facts and figures within your report. However, you may not wish to include all the supporting data and research backing up your proposals or arguments as this could unnecessarily clutter up the main report. The solution is for statistics, equations and calculations, technical specifications, and other peripheral data to be included separately in appendices that can be numbered and referred to in the main text. However, appendices should not be used for the sake of it in order to bulk out the report – the reader appreciates quality over quantity.

Final note

If you want to emphasize data, or even text, do not be tempted to use all the features that your computer program possesses. The judicious use of underling, bold, or italics is sufficient in text, tables, and some GCDs, with colour also a useful tool for emphasis in GCDs. Remember, as with all things in life – moderation in all things.