

Quick Learning Guide

Excellence in Business Communication, 9th Edition

Chapter 11

Planning Reports and Proposals

SUMMARY OF LEARNING OBJECTIVES

- 1 Adapt the three-step writing process to reports and proposals.** The comprehensive nature of the three-step process is ideal for the work involved in most reports and proposals. Use all the advice you learned in Chapters 4 through 6, with added emphasis on a few specific points for longer documents: (1) identify your purpose clearly to avoid rework, (2) prepare a work plan to guide the research and writing tasks, (3) determine whether a separate research project might be needed to gather the necessary information, (4) choose the appropriate medium (or media, in some cases) for your audience, and (5) organize your information by selecting the best approach for an informational or analytical report.
- 2 Describe an effective process for conducting business research, and explain the difference between primary and secondary research.** Begin the research process with careful planning to make sure you focus on the most important questions and identify the best place to find answers. Then locate the data and information, using primary and secondary research as needed. Process the results of your research, analyzing both textual and numeric information to extract averages, trends, and other insights. Apply your findings by summarizing information for someone else's benefit, drawing conclusions based on what you've learned, or developing recommendations. Finally, manage information effectively so that you and others can retrieve it later and reuse it in other projects. Primary research is research that is being conducted for the first time, whereas secondary research involves information that was originally gathered for another research project or another effort.
- 3 Provide five guidelines for conducting an effective online search.** First and foremost, you need to read and understand the instructions for using each online research tool because they vary widely and may not search for or display results in the manner you expect. Second, pay attention to the details because even minor aspects of searching can influence results dramatically. Third, review search and display options carefully to optimize results. Fourth, try variations on your search terms if you can't find what you're looking for. Fifth, try narrower or broader searches to adjust the scope of what you're looking for.
- 4 Describe the major tasks involved in processing and applying your research results.** In most cases, you need to process your research results in some fashion before applying them in reports and presentations. The three basic ways to process verbal information are quoting (using someone else's word directly, with appropriate attribution), paraphrasing (restating someone else's words in your own language), and summarizing (creating a shorter version of an original piece of writing). Processing numeric data can involve a variety of statistical analysis techniques. Three basic computations are the mean (what people mean when they say "average"), the median (the midpoint in a series, indicating an equal number of lower and greater values), and the mode (the most frequently occurring value in a series). Processing results can also involve looking for trends and distinguishing causal relationships from correlations and mere coincidences. Research results can be applied in several ways, depending on the purpose of the report or presentation. A summary is a shortened version of one or more documents, research results, or other information; it filters out details and presents only the most important ideas. A conclusion is your analysis of what the findings mean (an interpretation of the facts). A recommendation is your opinion (based on reason and logic) about the course of action that should be taken.
- 5 Explain how to organize informational reports and website content.** Most informational reports use a topical organization, arranging material by comparison, importance, sequence, chronology, spatial orientation, geography, or category. To help ensure effective organization of websites, 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. Finally, break your information into chunks that can be scanned and absorbed quickly.
- 6 Discuss three major ways to organize analytical reports, and explain how to plan proposals.** The three most common ways to organize analytical reports are by focusing on conclusions (using the direct approach to present your conclusions immediately), focusing on recommendations (also using the direct approach), and focusing on logical arguments (using the indirect approach to build up to your conclusions or recommendations). The single most important factor to consider when organizing a proposal is whether the proposal is solicited or unsolicited. For a solicited proposal, the direct approach is nearly always better because the audience expects and wants to read your proposed solution. For an unsolicited proposal, the indirect approach is usually better because the reader isn't expecting the proposal and may not agree with you that a problem or an opportunity even exists.

THE BIG IDEAS

- Most business reports use the direct approach; use the indirect approach when you need to build support for your main idea.
- Researching without a plan wastes time and usually produces unsatisfactory results.
- Evaluate your sources carefully to avoid embarrassing mistakes.
- Start your research by conducting secondary research first.
- Much of the information online has not been subjected to rigorous quality controls, so try to confirm your findings with multiple sources.
- Specialized search engines can help reach the *hidden internet*.
- Proper documentation of the sources you use is an ethical responsibility.
- For a survey to produce valid results, it must be based on a representative sample of the population of interest.
- Quoting a source means reproducing the content exactly and indicating who created the information originally.
- Paraphrasing is expressing someone else's ideas in your own words.
- Summarizing paraphrases and distills the content into fewer words.
- A conclusion is a logical interpretation of research results.
- A recommendation is a suggested course of action.
- Informational reports are used to monitor and control operations, to implement policies and procedures, to demonstrate compliance, and to document progress.
- In planning and writing website content, the unique nature of online communication requires special consideration.
- Analytical reports are used to assess opportunities, to solve problems, and to support decisions.
- Proposals always compete for something—money, time, attention, resources, or other considerations.

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Ying-Ying Zheng



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