Formal Reports

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Understanding Business Proposals

Definition

A proposal is a persuasive document designed to motivate the reader to spend, make, or save money.

Kinds

- Internal – May take the form of justification/recommendation report
- External – Solicited (responding to RFP) or unsolicited (prospecting for business)
- Formal – long, many parts
- Informal – shorter, six main parts

Informal Proposals

❶ Introduction

❷ Background

❸ Proposal

❹ Staffing

❺ Budget

❻ Authorization request

Informal proposals are usually presented in 2- to 4-page letters or memos and have six main parts.

Click icon to see model

Adobe Acrobat Document

Informal Proposals

Introduction should provide "hook" to capture reader's interest.

Background section identifies problems and goals of project.

Proposal discusses plan and schedule for solving existing problem.

Staffing section describes credentials and expertise of project leaders.
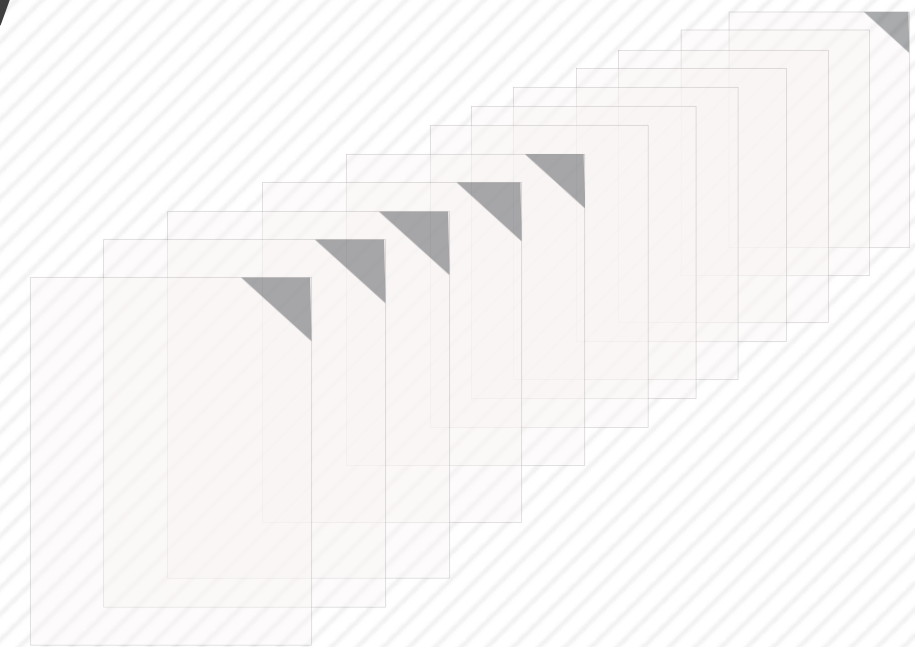
Budget indicates project costs.

Authorization asks for approval to proceed.
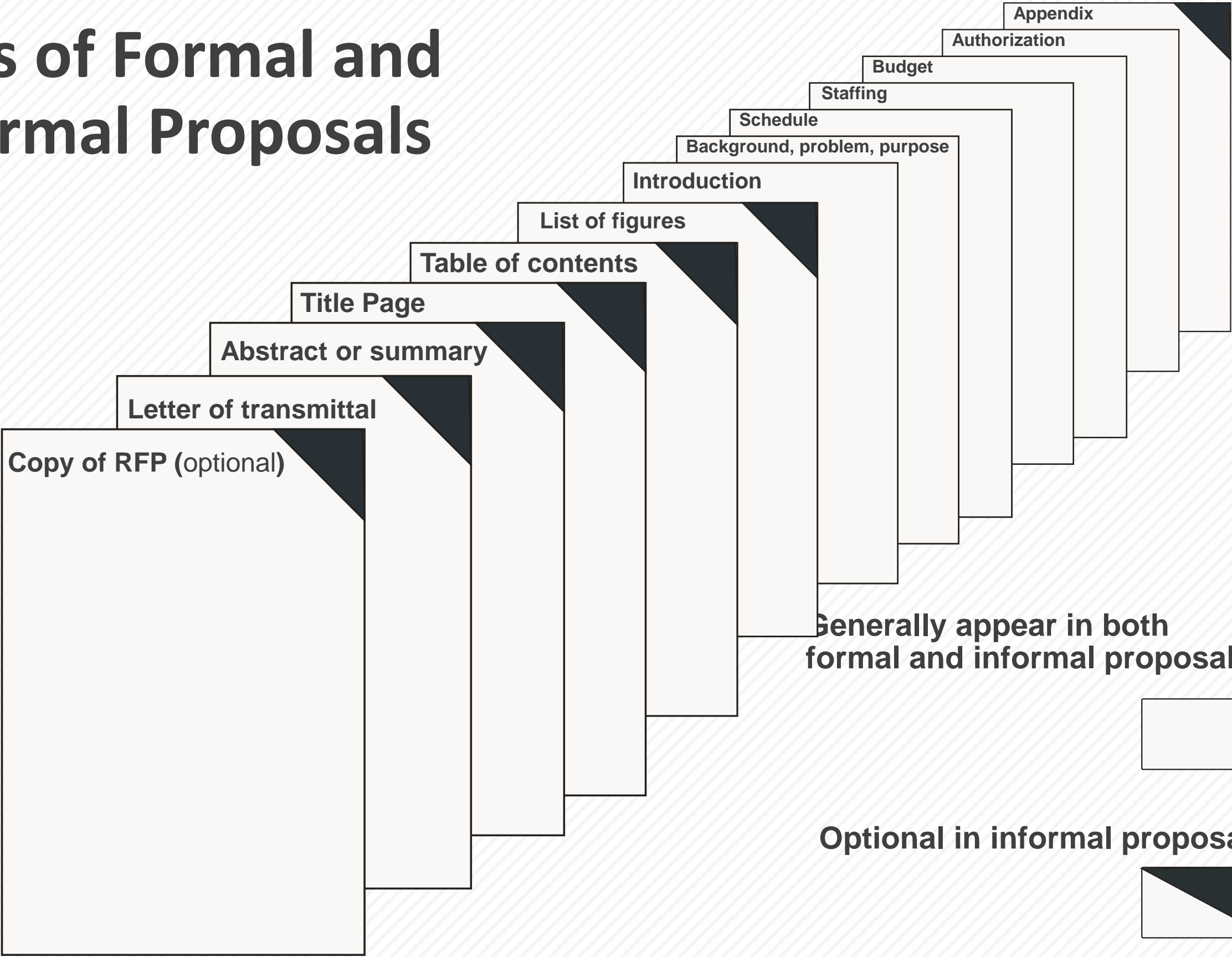
Formal Proposals

Formal proposals include all the basic parts of informal proposals but may have additional parts.
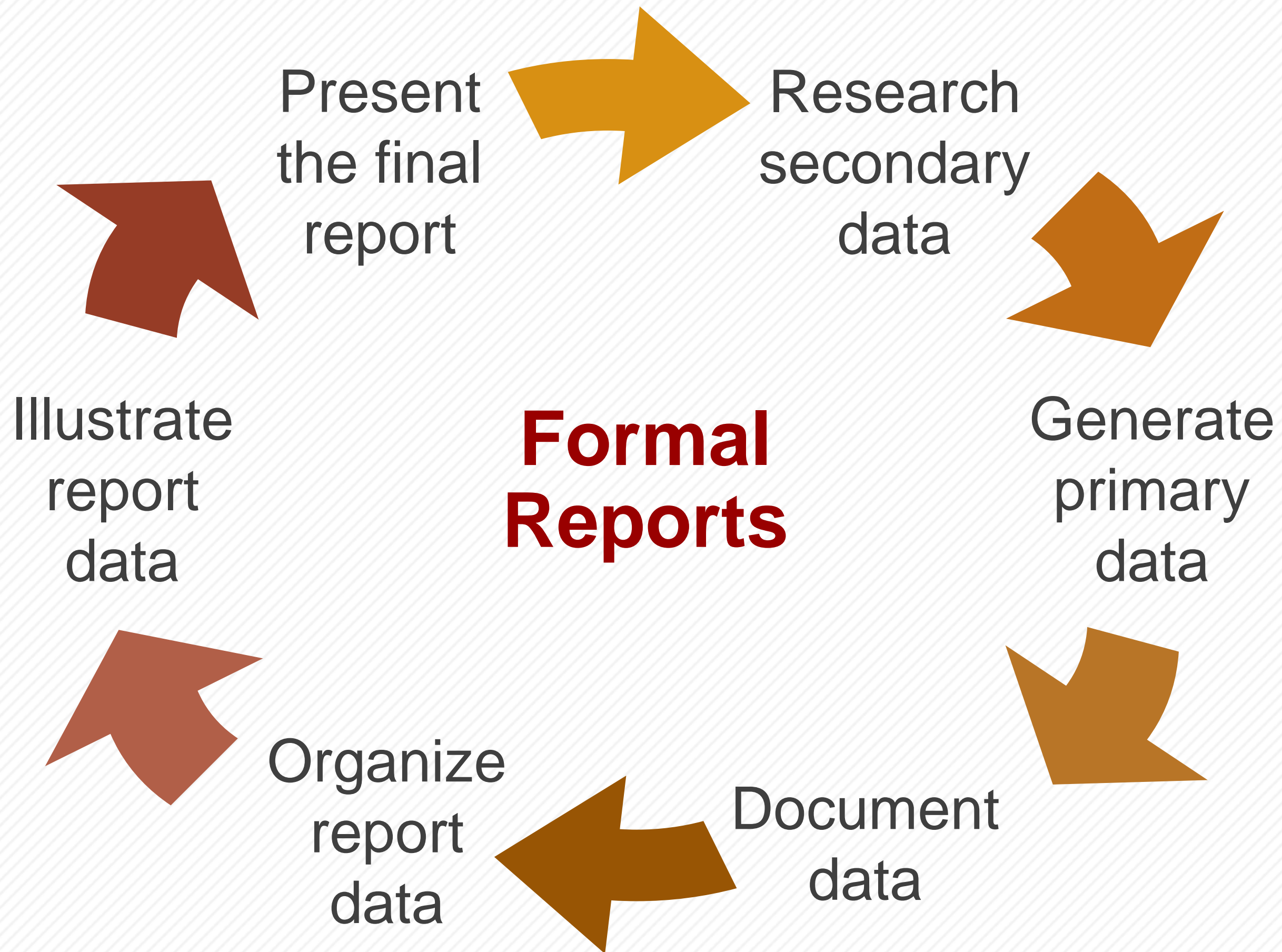
Possible additional parts:

- Copy of RFP
- Letter or memo of transmittal
- Abstract and/or executive summary
- Title page
- Table of contents
- List of figures
- Appendix

Parts of Formal and Informal Proposals

Copy of RFP (optional**)**

Letter of transmittal

Abstract or summary

Title Page

Table of contents

List of figures

Introduction

Background, problem, purpose

Schedule

Staffing

Budget

Authorization

Appendix

Generally appear in both formal and informal proposals:

Optional in informal proposals:

Formal Reports

- Present the final report
- Research secondary data
- Generate primary data
- Document data
- Organize report data
- Illustrate report data

Researching Secondary Data

Print Resources

- Books
- Periodicals
- Bibliographic indexes such as *Reader's Guide*
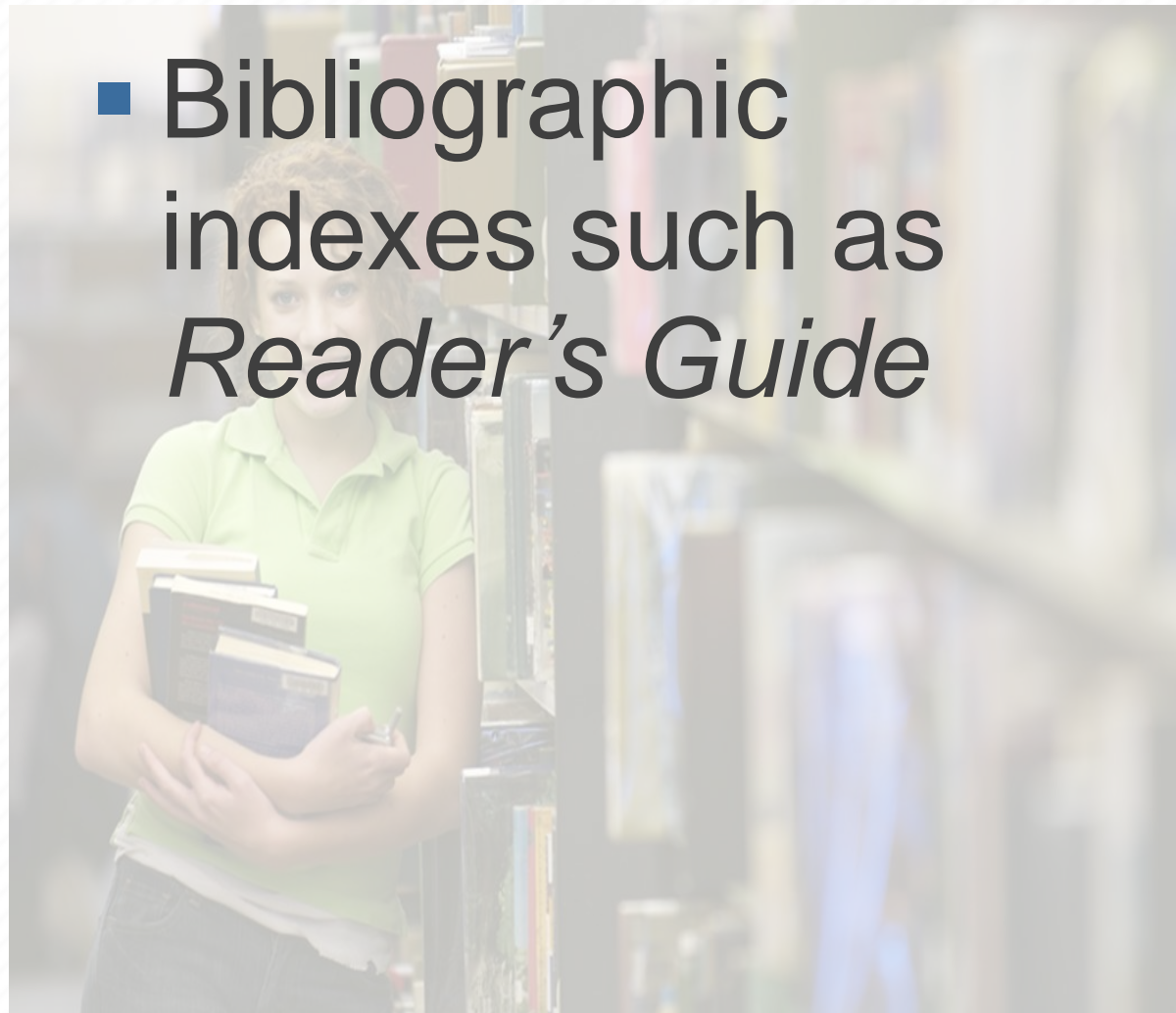
Electronic Databases

Collections of magazine, newspaper, journal articles

Examples

- EBSCO Business Source Premier
- Factiva
- ABI/Inform
- LexisNexis

Researching Secondary Data

The Web
Product data
Mission statements
Staff directories
Press releases
Company news
Article reprints
Employment information
Facts of all kinds
Blogs (weblogs) for consumer reviews and opinions

Web Search Tips
and Techniques
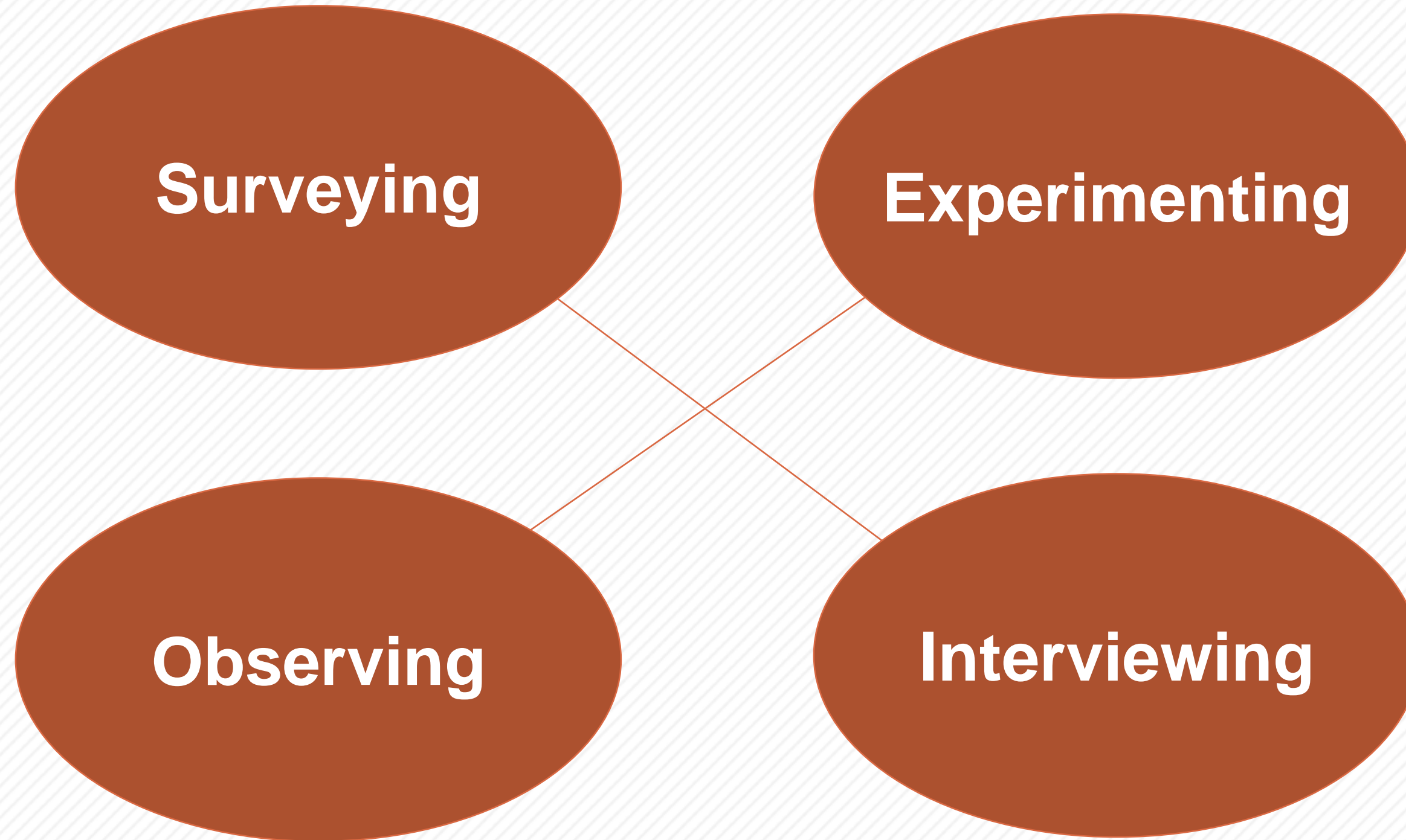
Use two or three search tools.

Know your search tool.

Understand case sensitivity in keyword searches.

Use nouns as search words and as many as eight words in a query.

- Use quotation marks.
- Omit articles and prepositions.
- Proofread your search words.
- Save the best.
- Keep trying.
- Consider searching blogs, wikis, and social networks.

Generating Primary Data

Generating Primary Data

Surveying
- Develop questions, conduct trial.
- Work in person or online.

Interviewing
- Locate an expert.
- Consider posting an inquiry to an Internet newsgroup.
- Prepare for the interview.
- Maintain a professional attitude.
- Prepare objective, friendly questions.
- Watch the time.
- End graciously.

Generating Primary Data

Observing
- Be objective.
- Quantify observations.

Experimenting
- Develop rigorous research design.
- Pay careful attention to matching experimental and control groups.

Documenting Data

What to document

- Another person's ideas, opinions, examples, or theory

- Any facts, statistics, and graphics that are not common knowledge

- Quotations of another person's actual spoken or written words

- Paraphrases of another person's spoken or written words

Organizing Report Data

Pattern	Development	Use
Chronology	Arrange information in a time sequence to show history or development of topic.	Useful in showing time relationships, such as 5-year profit figures or a series or events leading to a problem
Geography/ Space	Organize information by regions or areas.	Appropriate for topics that are easily divided into locations, such as East Coast, West Coast, etc.
Topic/ Function	Arrange by topics or functions.	Works well for topics with established categories, such as a report about categories of company expenses
Compare/ Contrast	Present problem and show alternative solutions. Use consistent criteria. Show how the solutions are similar and different.	Best used for "before and after" scenarios or for problems with clear alternatives

Organizing Report Data

Journalism Pattern	Arrange information in paragraphs devoted to *who, what, when, where, why,* and *how.* May conclude with recommendations.	Useful with audiences that need to be educated or persuaded
Value/Size	Start with the most valuable, biggest, or most important item. Discuss other items in descending order.	Useful for classifying information in, for example, a realtor's report on home values
Importance	Arrange from most important to least importance or build from least to most important.	Appropriate when persuading the audience to take a specific action or change a belief
Simple/ Complex	Begin with simple concept; proceed to more complex idea.	Useful for technical or abstract topics
Best Case/ Worst Case	Describe the best and possibly the worst possible outcomes.	Useful when dramatic effect is needed to achieve results; helpful when audience is uninterested or uninformed
Convention	Organize the report using a prescribed plan that all readers understand.	Useful for many operational and recurring reports such as weekly sales reports

Levels of Headings in Reports

The main points used to outline a report often become the main headings of the written report.

- Major headings are centered and typed in bold font.

- Second-level headings start at the left margin.

- Third-level headings are indented and become part of the paragraph

Click the icon to view a document with headings.

Adobe Acrobat
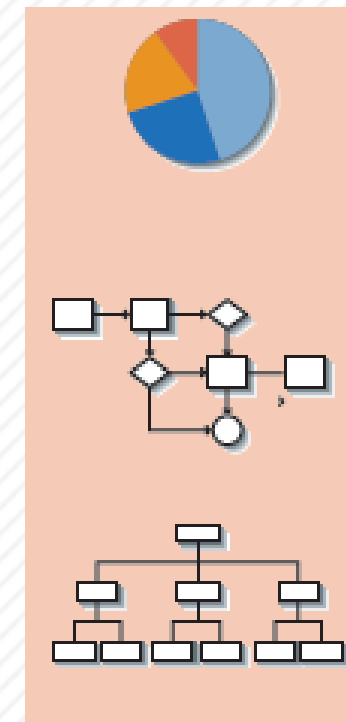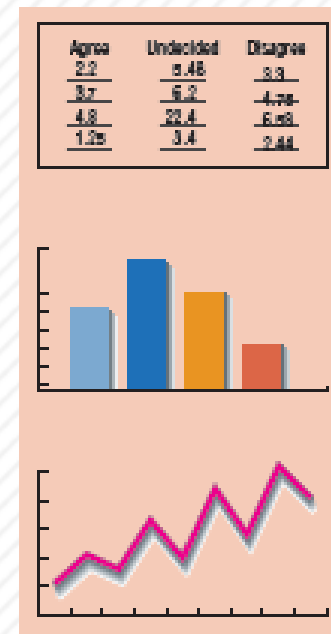7.0 Document

Illustrating Report Data

Reasons to use visual aids

- To clarify data
- To summarize important ideas
- To emphasize facts and provide focus
- To add visual interest

Illustrating Report Data

Most common types of visual aids

- Tables
- Charts
- Graphs
- Photographs

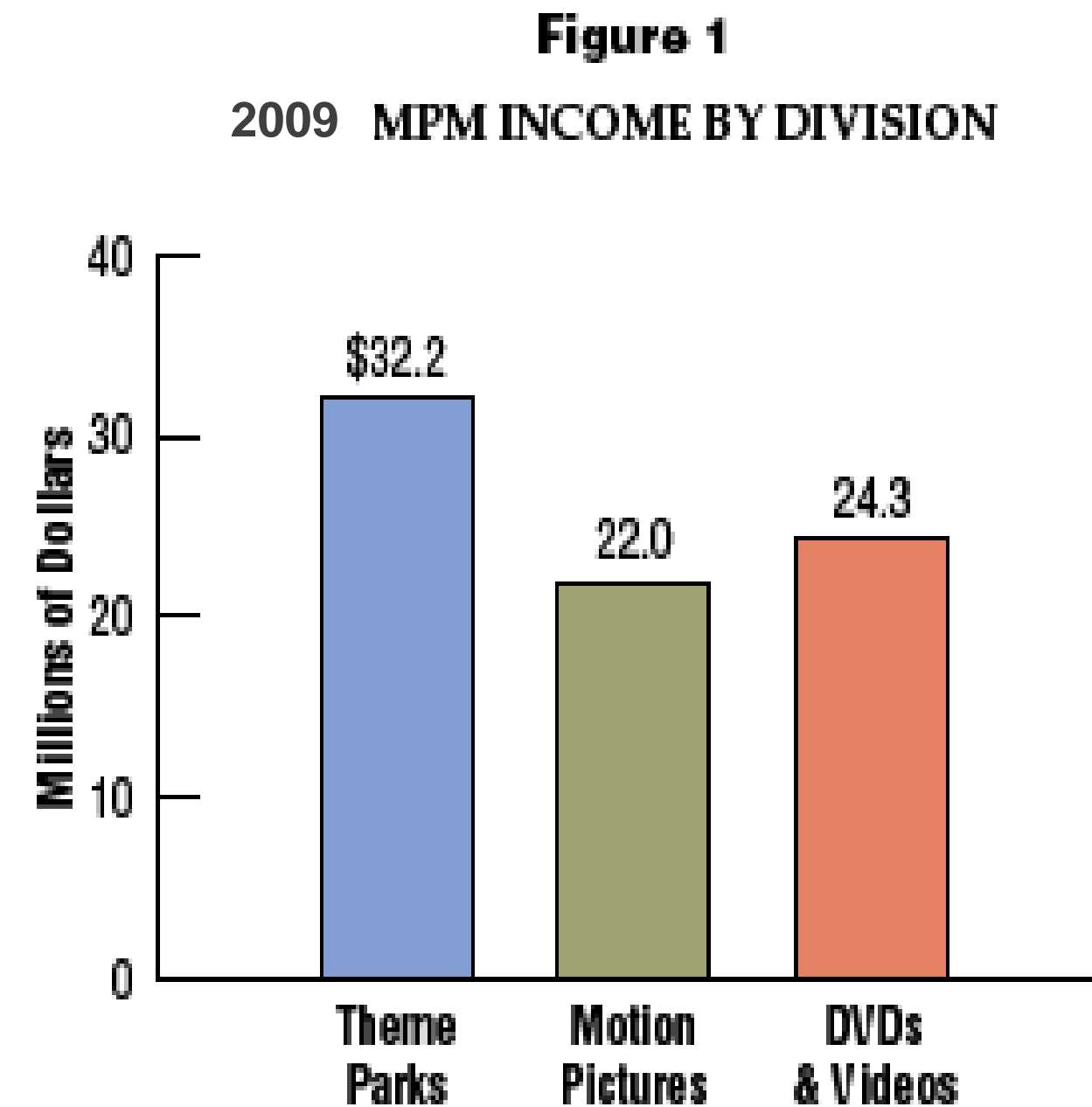# Matching Visual Aids With Objectives

Table

To show exact figures and values

Figure 1 MPM Entertainment Company Income by Division (in millions of dollars)				
	Theme Parks	**Motion Pictures**	**DVDs and Videos**	**Total**
2006	$15.8	$39.3	$11.2	$66.3
2007	18.1	17.5	15.3	50.9
2008	23.8	21.1	22.7	67.6
2009	32.2	22.0	24.3	78.5
2010 (projected)	35.1	21.0	26.1	82.2

Source: *Industry Profiles* (New York: DataPro, 2009), 225.

Matching Visual Aids
With Objectives

Bar Chart

To compare one item
with others
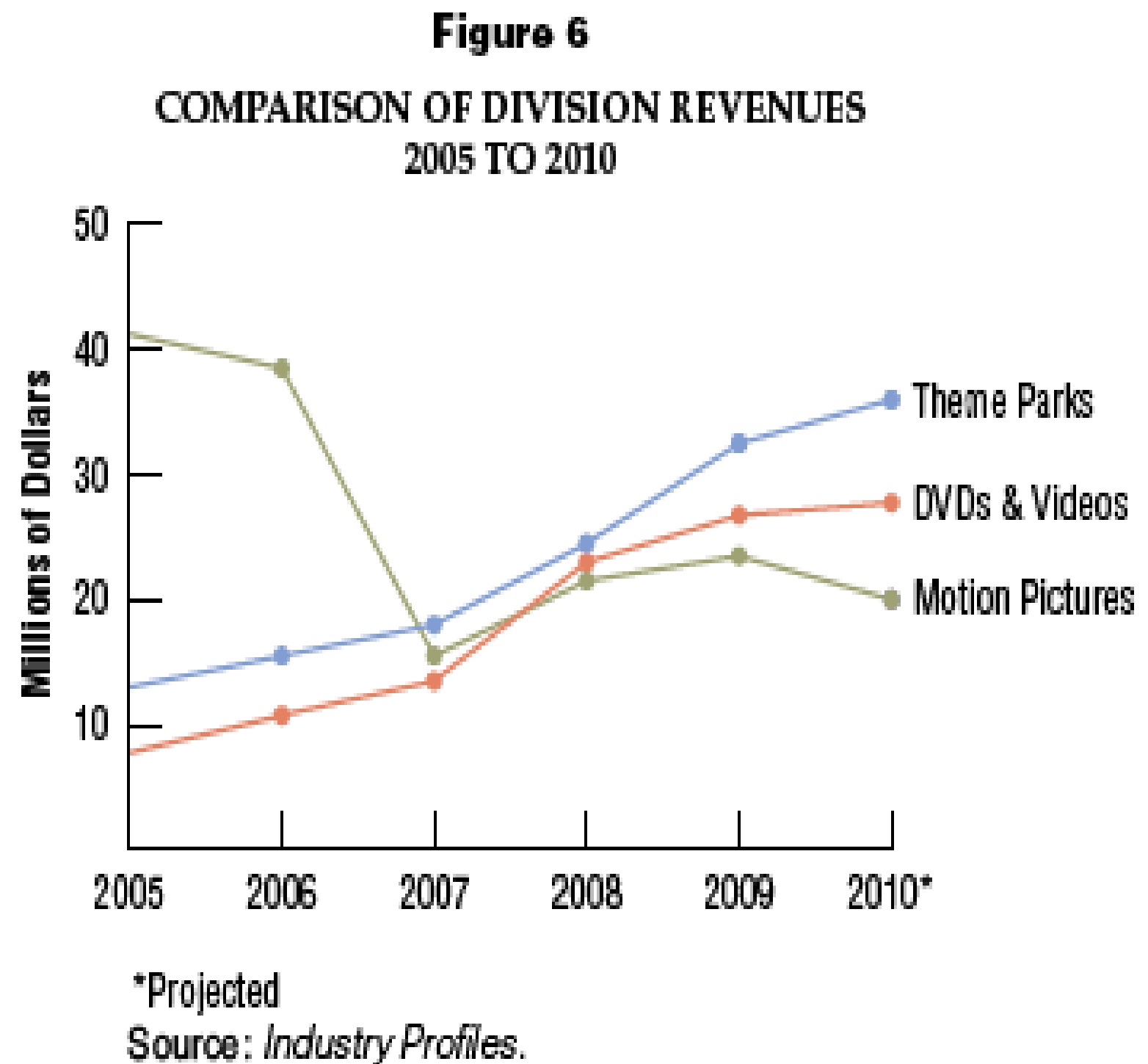

Figure 1

2009   MPM INCOME BY DIVISION

Source: *Industry Profiles* (New York: DataPro, 2009), 225.

Matching Visual Aids
With Objectives

Line Chart

To demonstrate changes in quantitative data over time

Figure 6

COMPARISON OF DIVISION REVENUES
2005 TO 2010

*Projected
Source: *Industry Profiles.*

Matching Visual Aids
With Objectives

Figure 8

2009 MPM INCOME BY DIVISION

Theme Parks
Motion Pictures
DVDs & Videos

DVDs & Videos 31%
Theme Parks 41%
Motion Pictures 28%

Source: *Industry Profiles.*

Pie Chart

To visualize a whole unit and the proportions of its components
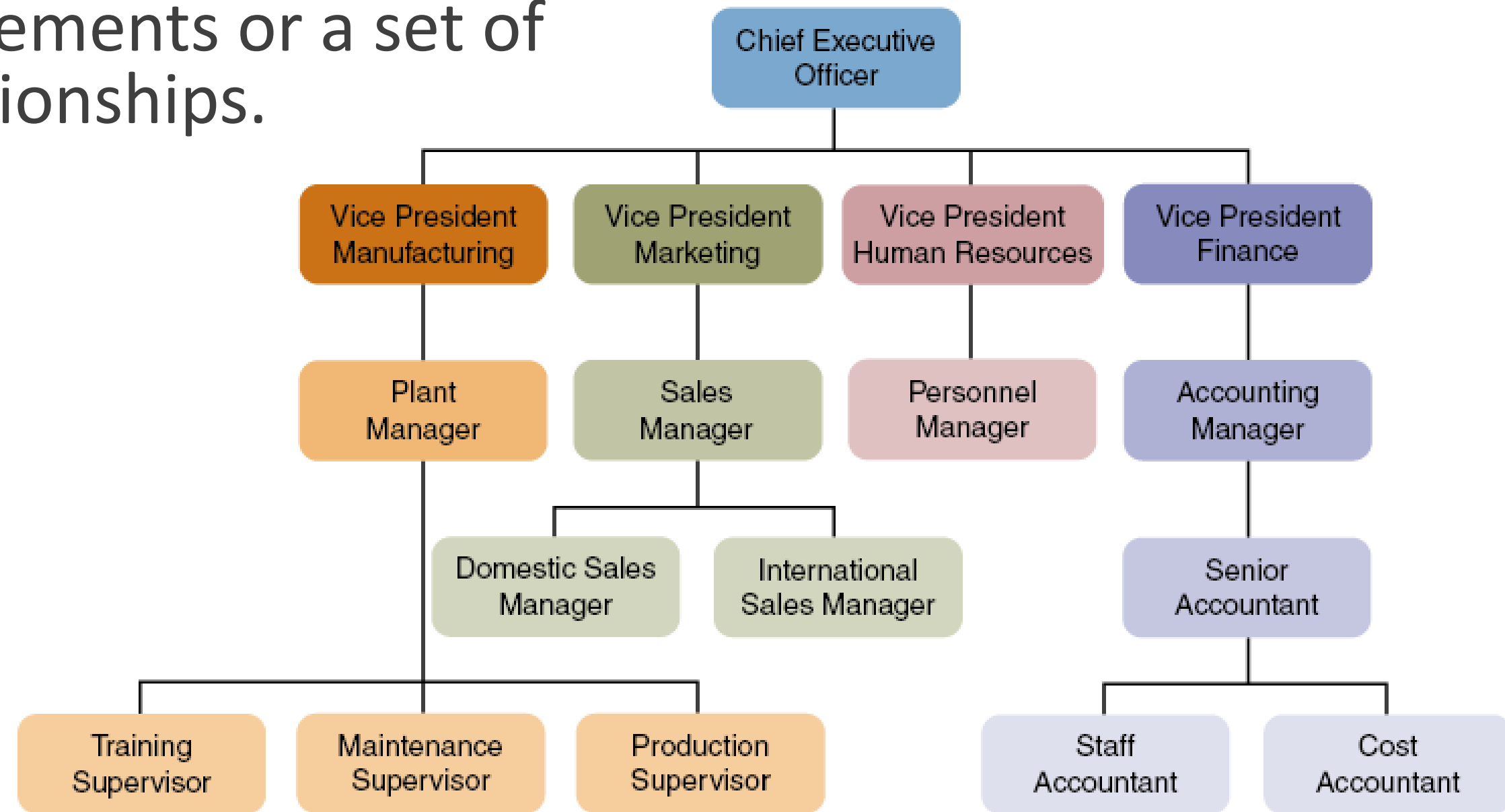
Matching Visual Aids With Objectives

Flow Chart

To display a process or procedure
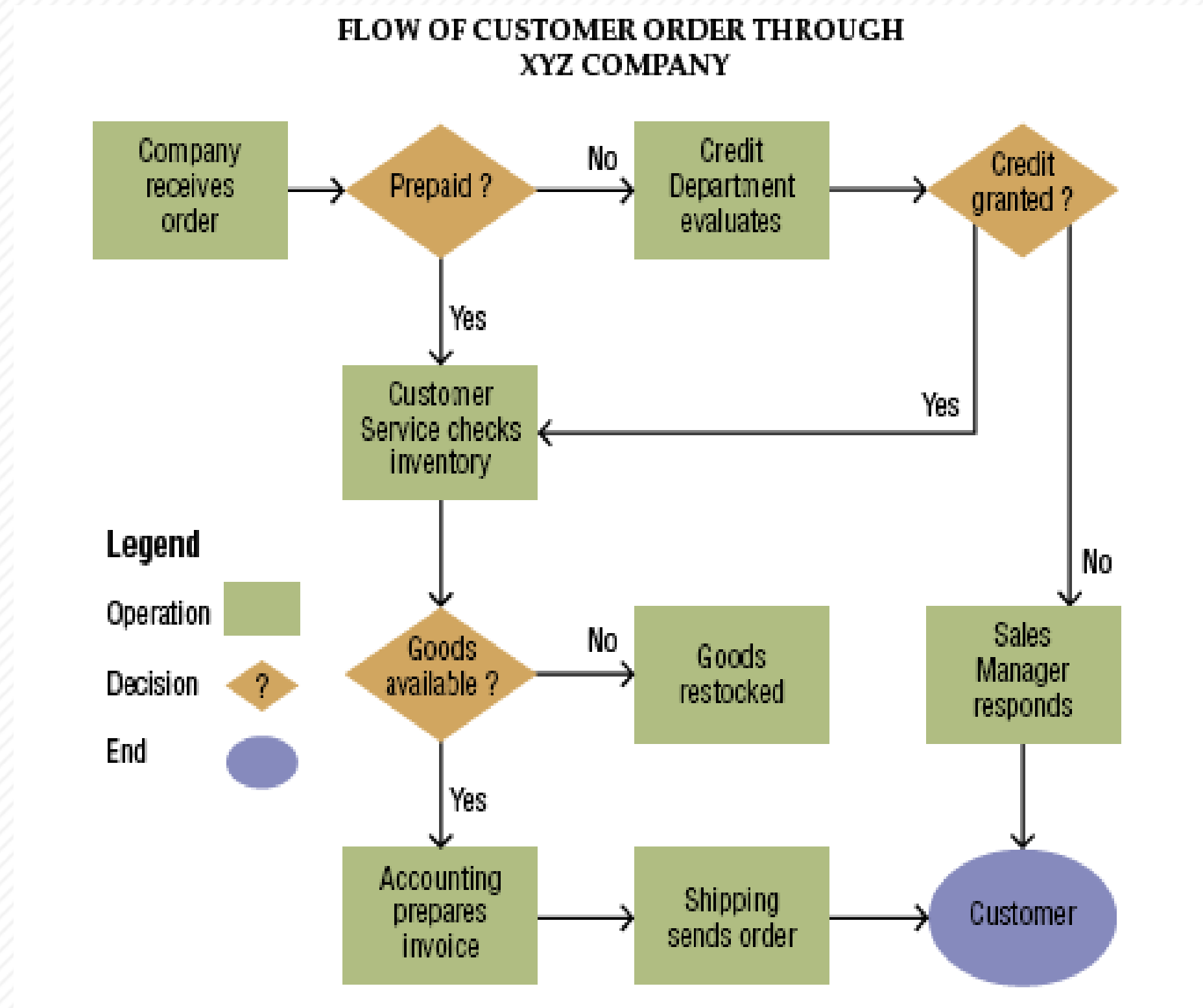
Matching Visual Aids With Objectives
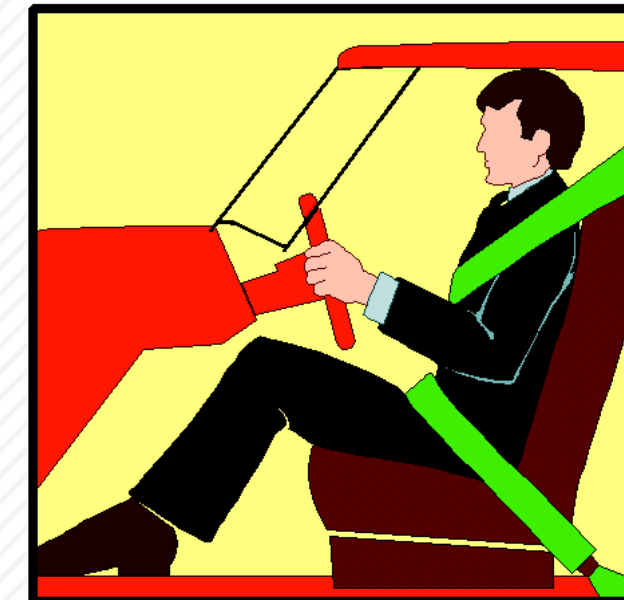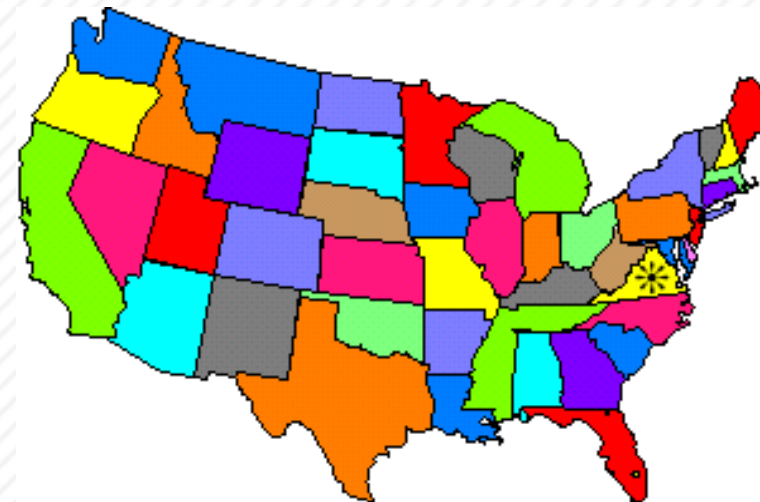
Organization Chart

To define a hierarchy of elements or a set of relationships.

Matching Visual Aids
With Objectives

Photograph, Map, Illustration

To achieve authenticity, to spotlight a location, or to show an item in use.

Tips for Effective Use
of Visual Aids

- Choose an appropriate visual aid to illustrate your objective.

- Clearly identify the contents of the visual aid with a meaningful title and appropriate labels.

- Refer the reader to the visual aid by discussing it in the text and mentioning its location and figure number.

Tips for Effective Use
of Visual Aids

- Locate the visual aid close to its reference in the text.
- Strive for vertical placement of visual aids.
- Give credit to the source if appropriate.

Parts of a Formal Report

Prefatory Parts

- Title page

- Letter of authorization

- Letter of transmittal

- Table of contents

- Executive summary, abstract, synopsis, or epitome.
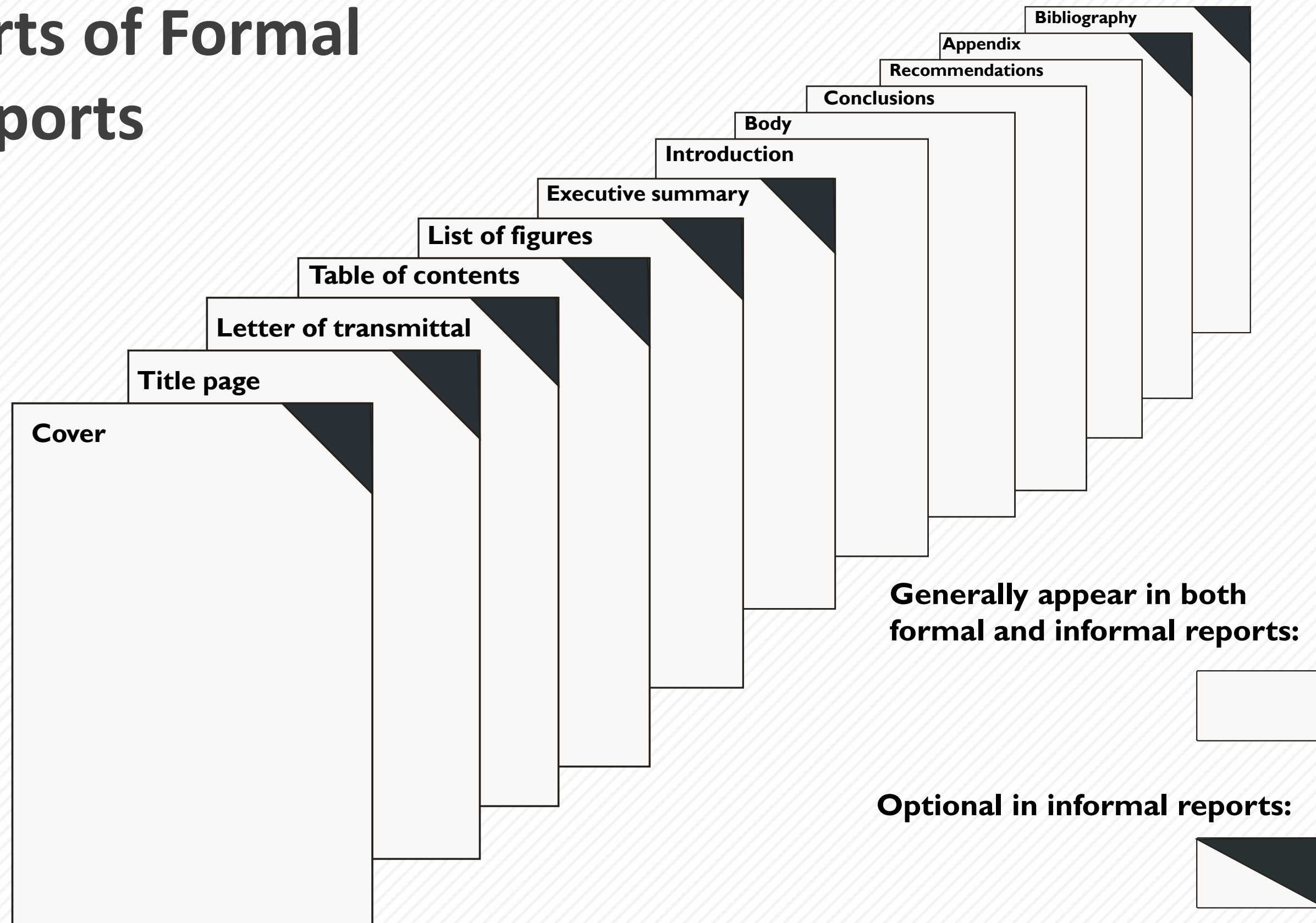
Parts of a Formal Report
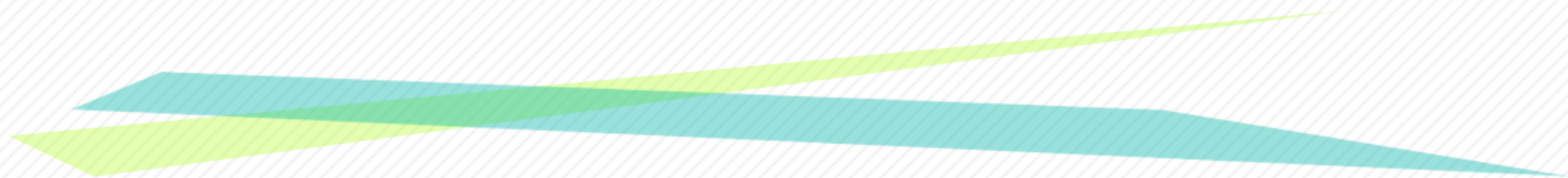
Body of Report

- Introduction or background

- Discussion of findings

- Summary, conclusions, recommendations

Supplementary Parts of a Formal Report

- Footnotes or endnotes
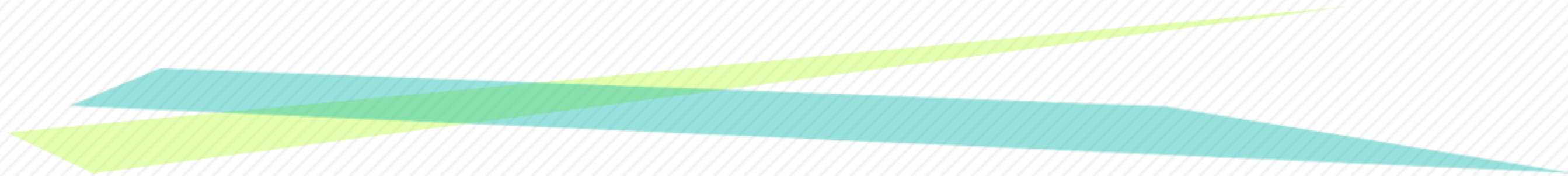
- Bibliography

- Appendix

Parts of Formal Reports

Cover

Title page

Letter of transmittal

Table of contents

List of figures

Executive summary

Introduction

Body

Conclusions

Recommendations

Appendix

Bibliography

Generally appear in both formal and informal reports:

Optional in informal reports:

REFLEKSI

- Informasi penting hari ini

- Manfaat penting dari informasi penting hari ini

- Tindak lanjut yang dapat saudara lakukan

Thank You! ☺

Any Questions?