

## *Look at the Records*

WHEN you are in a business position with a future, the subject of records and reports becomes very real and very important.

What did you do a year ago today? What plans do you have for a month from today? Records of work accomplished, plans for work to come, hunches, ideas, quotes, and appointments — these are the basis of constructive, progressive plans for accomplishment in the business world. In school, you took notes on lectures and reference readings to summarize and crystallize the points you wanted to remember. In business, your notes and records are even more important and should be more inclusive. In fact, they should be so complete and usable that one of your co-workers could understand them and carry on any project you have started.

Good records make for continuance of work. It has been said that the real test of an efficient worker is that she records her work and outlines her plans so exactly that another person could pick up this work and go ahead with it without loss to the company. Cooperation and teamwork are keynotes to success. The lone worker or prima donna doesn't belong in most business positions. If you are ill or called away from work, your work must go on. You can't afford to be careless about good, clear, accurate records.

The type of records required by your work may be suggested

by your immediate superior or left to your discretion. But you'll be wise to keep a record for your own protection against forgetfulness; to help you analyze your work; to make plans for improvement; and to make reports.

### ***The Daily Journal***

Some positions call for a record of each activity of the day, with the amount of time devoted to each one. This may be essential for the office manager to make charges to departments or projects, or it may be required as a check on the effectiveness of your use of time.

Other positions do not require a time-action record, but do require records of data, sales, contacts, programs, and major activities.

You may be bored with this detail work at first. You may spend too much time in writing records. But it is well worthwhile to form the habit of jotting down plans for daily work, names of people, titles of books and magazine articles, quotable sayings, facts, hunches, and pertinent data and happenings. Your daily journal can become an important tool for your work.

A desk calendar for appointments and extra duties may be used as a reminder for the records in your journal. Each notation on your calendar probably deserves a record of *what? why? who?* and, perhaps, *what of it?* Ten minutes at the end of the day may be enough for your day's record or you can keep a running account directly in your journal. Keep your record book handy and use it.

### ***Work Sheets***

Some positions require work sheets or forms to record specific information. If these are separate sheets, plan a systematic filing system to use until you compile the data and important facts in a permanent record. Loose record sheets are lost easily and may spoil a long project.

### ***Research Records***

Research work requires definite, accurate records, with nothing left to chance memory. Anyone who is trained to do research work



Loose record sheets are lost easily . . .

appreciates the importance of keeping a permanent record of each fact and figure as it occurs. It must be kept in such an organized form that each notation is incorporated into the over-all plan for the project. Dates, details of method, techniques, observations, results, and references are not only essential for progressive work but may prove invaluable in establishing patent rights and claims of monetary value.

*Records* are the basis on which reports are made.

*Reports* are evidence of accomplishment.

### ***The Purpose of a Report***

The purpose of a report is to present facts, plans, and suggestions in such a way that future action may be taken wisely. The purpose may be:

To assemble facts for a review of the problem.

To state facts to show the need for a program or project.

To present the progress made on a program or project.

To report on contracts and activities which have a significance to someone in the business.

To condense in logical, classified form the work of a designated period (day, week, month, or year).

The purpose of different reports will vary, but every report should be clear, concise, and correct.

**WHEN:** Be prompt in sending a report. The time element in business is so important that a delay may make the report worthless. Few people enjoy writing a report, but procrastination doesn't make it easier!

**WHO:** A report is made to a definite person or group of persons. Keep that person or group in mind as you write, so that your report has meaning.

**WHY:** Before you start to write, review the subject and decide why the report is important.

**WHAT:** Think through what you want to say, what facts are essential, and what details may be omitted.

**How:** Organize your report so that the reader gets the purpose and impact of your report at once and can follow the organization of your presentation.

Test the organization of your report. Be sure the person to whom it is written will get a clear and concise picture of the

subject. Make your statements give the correct meaning and proper emphasis.

The length of the report is important. If you visualize the purpose of the report, the persons who will read it, and the importance of this report in terms of company business, you can judge whether this subject deserves a half-page memo or a 20-page detailed report. Try to answer the question, "What of it?" This may help you give proper emphasis and balance.

*Write* the report when you are enthusiastic. *Check it over later* when you are analytical and critical. *Rewrite* it when you are calm, objective, and impersonal.

Are you willing to be judged by that report?

### **Some Don'ts**

Avoid criticism of another person in the organization. When it is necessary to register a complaint or criticism, think about it, then discuss it with your superior. The written word is limiting and may cause trouble you wish to avoid. There is always the chance that you may not understand all the circumstances.

Avoid taking credit for work done by others. Be generous in giving credit to co-workers.

Avoid half-statements or implied statements you can't substantiate. Be explicit and correct in limiting the statement to a specific time, place, person, or fact.

Avoid unnecessary details. Don't detour! Reserve little asides for your personal records. Perhaps you can use these in a conference or an explanation, if required. Your main points can be lost in the little items.

Avoid opinions on subjects you are not qualified to judge. Keep to the facts in your field of work.

Don't send a report until you have read it for clarity, conciseness, accuracy, and emphasis.

Don't send a report unless it does credit to your perception, organization ability, efficiency, and good judgment.

Don't send copies of your report to anyone until your superior approves and authorizes you to do so.

Are you willing to be judged by that report?



**Mechanics of a Report**

The *appearance and form* of a report should invite quick reading. The form for the report may be given to you or you may be expected to organize it and set it up. This is a test of your organizational ability and shows whether or not you are a clear thinker. Give your best effort to every report. Forms for reports vary according to the purpose or type, company policies, and importance of the report to your company.

*Use good English*, spelling, and punctuation. Use the third person when possible. Avoid *I*, (*we* is a form of *I*). Use names when necessary to make the point clear. Avoid indefinite *it*, *they*, *some*, *many*.

*Select headings* for important divisions, with subheadings for lesser points. Keep all headings parallel in construction. Under-score important words and use other devices to make points clear and reading easy. Keep the tense of the verb consistent. "The meeting *resulted* in . . . , action *was* taken to. . . ."

*Use charts, graphs, diagrams*, or tabulations of figures or facts if these clarify points. A tabulation of figures gives, at a glance, facts that would take pages to explain less effectively.

*Check or mark in margin* the particular point of interest to each person to whom a copy of the report is sent. In this way, one report of a meeting may be sent to several persons with different paragraphs checked for each person. A short memo may be sent with each report calling attention to the checked statement.

*Keep reports as compact* and short as possible to give the facts. Avoid too much detail. Stenographic help may not be adequate to handle unnecessarily long reports. Files are always crowded.

**A Plan for a Report**

**FROM WHOM:** Write your name and department in a top corner.

**TO WHOM:** Be sure to send the report to the right persons. Usually the report is made to your immediate superior. She can tell you if copies are to be sent to other interested persons.

**TITLE:** Give the report an explicit short title that is a definite clue to the subject and that facilitates filing.



Give the report an explicit short title that facilitates filing.

**DATE:** Give complete date of meeting or time of report. If the report is for a period of time, give inclusive dates, as June 19— to Jan. 19—.

**PURPOSE:** Give a statement of the purpose of the meeting, data, or other reason for the report.

**REVIEW:** This usually comes after the purpose. This may or may not be necessary to set the stage for the report. If a review of literature, previous events, or circumstances is important, state this briefly.

**BODY OF REPORT:** Use headings and subdivisions according to subjects, chronological or other logical sequences or activities. Begin each section with a topic sentence. Follow this with a sentence related to the topic. Use this same plan throughout the body of the report.

**EVALUATION:** Give your evaluation or summation of the report. This may be placed directly after the purpose to save the time of the person who receives the report. Remember that those in management positions receive a mass of reports which take up many office hours. Your evaluation and summary will indicate whether a follow-up conference on your report is important.

**RECOMMENDATIONS:** Make constructive suggestions for future action, changes, etc. Weigh these statements carefully to be sure you have a sufficiently broad experience to express this opinion. Do not overstep your position.

**FOLLOWUP:** List action that remains to be done to complete or follow up the report.

**Kinds of Reports**

There are so many kinds of reports that no attempt is made here to cover all variations. Many companies have certain forms for writing reports. You will find it helpful to check the method your associates have used in writing similar reports. As a beginner, you can learn from filed reports of others the best form to use for different occasions. You'll find that some of your associates are experts in giving facts in a clear, quickly read style. Others may include details and extra words which confuse the reader. You may have to decide when a subject or project requires a short memo, an informal note, a brief report, or a formal presentation or working plan. You may be asked to give an oral report as part of a group activity.

The kinds of reports you are most apt to make include:

Oral report.

Memorandum (Memo) on a conference, idea, or observation.

Report of a meeting of a committee or group in the company, trade association, professional society, or consumer affair.

Report of a trip, a new program or project, of progress on past work, or weekly, monthly, biannual activities.



Avoid taking credit for work done by others.



### **Oral Report**

Never underestimate the importance of an oral report. Plan it, organize it, think it through, and outline it. Even if this is just a 5-minute conference with your director, know what you want to say. Stick to your subject. Have a pencil and notebook handy to write down her comments or directives.

You may be asked to give a report in a group meeting. This is a real test of your clear thinking.

Be sure you understand the purpose of the meeting and your part in the over-all plan. How much time are you allowed? Never take more than your allotted time. This requires careful selection of facts and clear organization.

Visualize your audience as you plan. Select statements that have meaning to that particular group. Keep to your subject. Do not take credit for the work of others. Plan the presentation to suit the size and character of the group. Don't be overdramatic. The tone of your report to a group of 6 should be different than that used for 600.

Plan and organize your facts. Make an outline of the major points. Limit the number of points to the time allotted you. Write out an opening sentence that tells what you plan to report. Don't be historical or take time to review the case, but if necessary, review past events briefly after you have stated the main purpose of your report. Develop each point sufficiently to make it clear, but do not belabor it or overwork a particular subject. Write a summary. You may write out your report, *but don't read it!*

Practice your talk, but do not give the impression you are reciting a piece. Speak from your own experience and prove that you know what you are saying.

The old advice is still good: Tell them briefly what you are going to say, say it, and tell them in summary what you have said. Time the report and keep to your time.

Notice whether other members of the group stand or sit to give their reports. Often, in company meetings, the group sits around a table or in an informal circle.

Face the group. Remember the protocol of your company, and address most of your report to the person of highest rank.

However, do not exclude others in the group. Talk *with* the group, not at them.

Relax. Speak clearly so that everyone can hear. Keep the tempo of your report lively, but don't race through it. Try to speak naturally and sincerely. Do not orate.

Be factual and be sure you can explain or expand the facts if there is a discussion period. Because oral reports are followed often by a question period, keep reference data at hand to give details if necessary. Charts or figures may be typed and handed out later if necessary. Be sure everyone can see any illustrative material you use.

If charts or illustrative material are helpful, plan these to suit the type of group. Overelaborate charts may be out of place. However, illustrative material may make your points easily and clearly and give the group a quick understanding of your presentation.

Avoid passing samples around; this distracts the attention and you may lose your audience. Watch the reaction of the group. If you are sensitive to the reception of your report, you may find it good practice to omit some portion of it. Learn a summary statement and give it. Stop on time.

Mannerisms in giving a report may detract from the forcefulness of your presentation. Dress the part so you won't feel self-conscious. Watch your posture in sitting and standing. Try to be at ease. Listen to the reports of the others. Forget yourself



Watch the reaction of the group.

and get into the spirit of the meeting. Remember, you are just one of the group and you aren't expected to give a stage performance. You are expected to give a clear, understandable report on the subject assigned to you.

**Office Memo**

To:

Date:

From:

Subject: (*Example:* Booth, Wisconsin State Fair, August 12, 19—)

An office memo is usually an informal communication on a subject or portion of a subject. The subject may be used in subsequent memos or reports so that a file can be built up.

Some companies have forms for use in memos. Sometimes these forms state:

From the desk of . . . .

Memos are usually interoffice communications. They should be kept short, concise, clear.

**Report of Business Meeting or Conference**

Copies to:

Name:

To:

Date:

Name of meeting:

Purpose of meeting:

Attendance:

Main points of discussion:

Special points of interest to others in company:

Summary and evaluation:

Recommendations and follow-up:

**Report of Consumer Meeting**

Copies to:

From:

To:

Date:

Activity:

Name and title of contact:

Address of contact:

Attendance:

Summary:

(*State important points in short paragraphs. List name, title, and address of speakers. If you were on the program, state your subject.*)

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These meetings may be called to explore a subject, to assign work, to set up a plan. Be sure to take notes on who suggested what, and get *accurate* statements. When in doubt, ask for a restatement, to be sure you understand. Report essentials only.

Always end your report with:

Evaluation:

*(Was meeting worthwhile?)*

Followup:

*(List statements to check, to report, to cause action, to send material, etc.)*

### **Progress Report**

To:

From:

Title:

Date:

Review:

*(Give former work or report in brief paragraph.)*

Progress:

*(Give a brief statement of work since last report.)*

Remaining work to be done:

*(Give a brief statement.)*

Summary and conclusions when complete:

*(Try to indicate value to company, suggested use of whole or part of work, other projects suggested by findings.)*

### **Convention Report**

Copies to:

From:

To:

Date:

Name of Association:

Place:

Dates:

Good Talks

Speaker, title:

Subject:

Good points made:

Contacts

Name, title, address:

Subject of discussion:

Followup:

Exhibits

New or unusual features:

Names, addresses:

Evaluation or worth to company:

**Travel Report**

*(Forms to fill in each evening save time and act as reminders of important facts.)*

Name and address of superior:

Name of reporter:

Dates included in report:

Monday \_\_\_\_\_

Activity:

Name of contact:

Title:

Address:

Attendance: (Number)

Evaluation of contact:

Material requested:

Activity:

*(A summary page for entire week condenses report. The right kind of forms for your work minimizes time for you, for the stenographer, and for your superior.)*

**Project Report**

Presenting a project or plan of action is a real challenge to your ability. Do not underestimate the importance of this presentation. Make it clear, concise, and complete.

Before you write your first project report, ask to see other reports that have been submitted so that you can see the style that is acceptable. Different departments in a company use different styles and forms. The form used to report a research project is different than that used to present an advertising campaign, a plan for a sales meeting, or a proposal for an employees' open house.

The project report may be for a proposed project or for a finished project.

Think it through. Try writing your ideas as they come to you. Then reorganize and rework the plan. Let it rest a day or so in order that you can look at it critically to be sure it is logical, complete, and essential.

Keep the style consistent — either formal or informal. Watch the sentence structure to avoid long, involved sentences.

Outline your report. Use strong sentence subjects with explanatory sentences under each heading.

Use complete direct sentences that are easily and quickly read.

Give enough detail to inform the reader, but omit unnecessary details.

Develop the subject in logical sequence of time or importance of points.

Analyze and check your report.

*What* is the project? (Title)

*Why* is it important? (Purpose)

*Who* is involved in work? (Cooperation)

*How* will you proceed? (Method or plan)

*When* will you begin and finish work?

*What* is the estimated cost?

Rewrite your report until you are sure it sells your idea. Talk with your immediate superior about it, to make certain you haven't presumed too much or underestimated the project. Ask for suggestions, help on certain phases, and guidance to make the project complete. It is good judgment to get the best possible advice before you write the final report.

If this is a proposal, ask yourself, *what of it?* Is it worth the time and money?

If this is a report on a finished project, give an evaluation and state any suggestions that may be helpful for future work.

### ***Weekly and Monthly Report***

Some companies ask for a weekly or monthly report of work. These reports are usually set up according to a definite outline to give facts and figures. Reference may be made to project numbers or titles. These time-unit reports can give a condensed picture of activities and can act as an index of work for future reference. If you have kept a good daily record book, you will find it is easy to compile a weekly or monthly report.

### ***Annual Report***

What did you accomplish during the year? What do you want to accomplish next year?

An annual report is one of the best methods of checking your progress and charting your future. Whether you are required to make an annual report or not, you will profit by making a report for yourself.

If you have made monthly reports, you can tabulate results, figures, and data under activity headings. Look through your daily records, your file of memos, project reports, and all other reports. Take time to analyze and evaluate these.

You may find that a project that seemed important at the time does not seem to be as valuable in the light of the entire year. Weigh each activity in relation to the value to the company.

Group your activities into units so that similar projects are reported together, even though there was a time lapse between them. Plan your report by activities rather than by dates. Condense the facts to give a clear but concise statement of results.

Remember—this report may be sent to top management. Give enough explanation to make each activity clear, but do not give unnecessary details.

Give figures of cost and profit, number of items, minutes on radio or television, and total contacts. Chart data when possible to give a quick, complete picture.

Begin the report with a strong statement of the scope of the work, trends of increases, decreases, and changes. The first paragraph should set the stage for the report.

The organization, planning, analysis, writing, rewriting, checking, revision, and final writing will make use of all your skill in writing reports, your objective interpretation of values, and your comprehension of your ability to serve your company.

Condense the facts to give a  
clear but concise statement . . .

