

# Planning Reports and Proposals

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## Writing for the Workplace

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## The Three-Step Process

Planning	Writing	Completing
Analyze Situation	Adapt to the Audience	Revise
Gather Information		Produce
Select Medium	Compose the Message	Proofread
Get Organized		Distribute

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## Analyzing the Situation



**Define  
the Purpose**

**Prepare  
the Work Plan**

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## Statement of Purpose

Inform	Persuade	Recommend
Confirm	Analyze	Summarize

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## Preparing the Work Plan

Problem or Opportunity

Purpose and Scope

Tasks to Be Accomplished

Final Products or Outcomes

Schedules and Requirements

Plans for Following Up

Working Outline

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## Gathering Information



**Purpose**

**Audience**

**Priorities**

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## Selecting the Medium

**Hardcopy**

**Digital Format**

**Multimedia**



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## Organizing Information

<u>Direct Approach</u>	<u>Indirect Approach</u>
Conclusions and Recommendations	Overall Findings
Overall Findings	Discussion and Support
Objective Support	Conclusions and Recommendations

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## Supporting Your Messages

1. Plan your research
2. Locate data and information
3. Process data and information
4. Apply your findings
5. Manage information efficiently

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## Plan Your Research



Learn About the Subject

Target Information Gaps

Prioritize Research Needs

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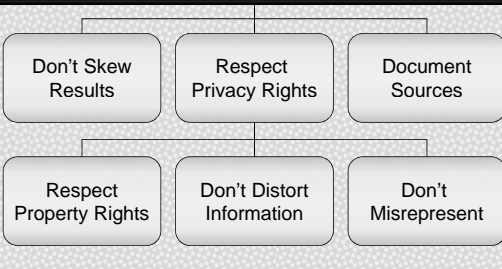
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## Ethics and Etiquette in Business Research



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## Data and Information

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## Evaluating Sources

<b>Source's Reputation</b>	
<b>Potential Bias</b>	
<b>Purpose of Material</b>	
<b>Author's Credibility</b>	

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## Evaluating Sources

<b>Source's Information</b>	
<b>Third-Party Feedback</b>	
<b>Timeliness</b>	
<b>Completeness</b>	

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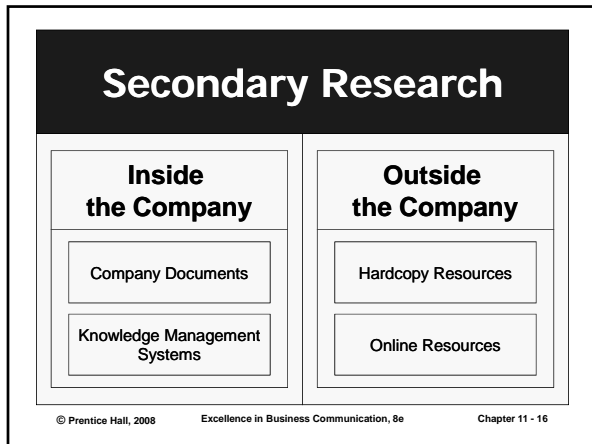
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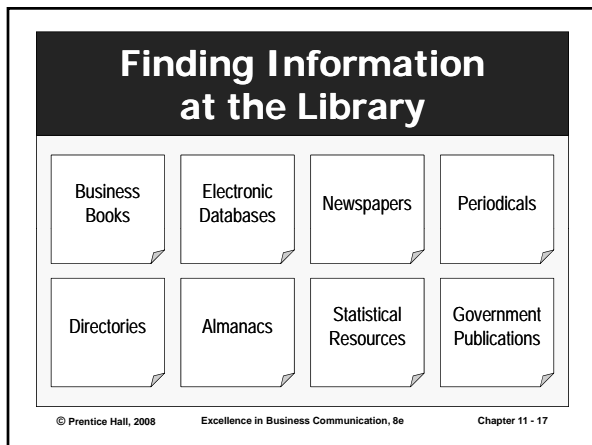
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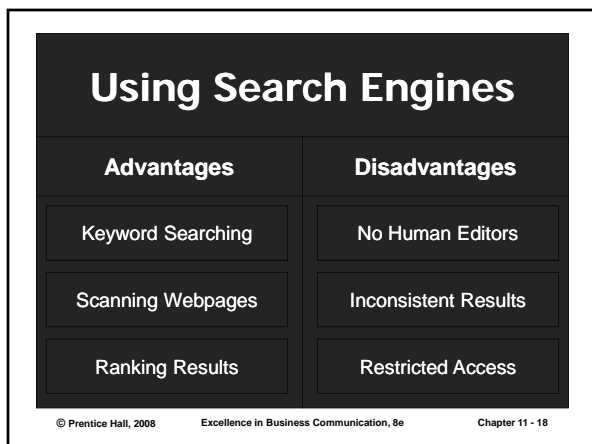
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## Alternate Search Methods

Dynamic Pages

**Web Directories**

**Metasearch Engines**

**Online Databases**

Hidden Internet      Deep Web

Password Protection

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## Search Techniques



<b>Keyword Searches</b>
<b>Boolean Operators</b>
<b>Natural Language</b>
<b>Forms-Based Searches</b>

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## Fine Tune Search Methods



- ✓ Read the instructions
- ✓ Observe the details
- ✓ Review your options
- ✓ Vary the search terms
- ✓ Adjust the search scope

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## Innovative Search Methods

Desktop Search Engines

Enterprise Search Engines

Research Managers

Content Managers

Social Bookmarking Sites

Newsfeeds

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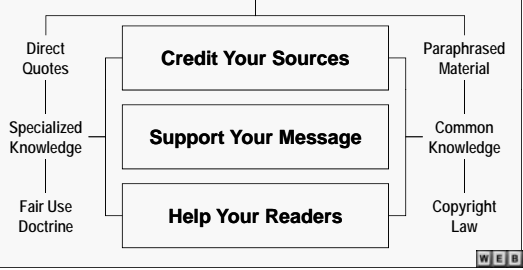
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## Documenting Sources



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## Primary Research

- Surveys
- Interviews
- Experiments
- Observations



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# Conducting Surveys

**Representative  
Sample**

**Effective  
Questions**

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# Effective Questionnaires

Clear Instructions	Reliable Answers	Short Questionnaires	
Easy-Analysis Answers	No Leading Questions	Unambiguous Questions	No Compound Questions

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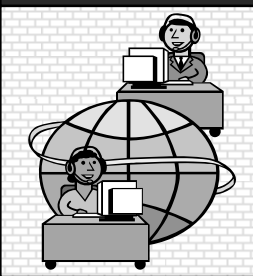
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# Effective Internet Surveys



**Minimize Cost**

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**Reach People**

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**Boost Response**

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## Conducting Interviews

<b>Types of Questions</b>	
<b>Question Sequence</b>	
<b>Subject's Background</b>	

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## Processing Information



- Gather your thoughts
- Review your notes
- Organize the material
- Transcribe recordings

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## Using Research Results

<b>Mean, Median, and Mode</b>	<b>Overall Trends</b>
<b>Cause and Correlation</b>	<b>Cross-Tabulation</b>

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<b>Processing Data and Information</b>	
Quoting	
Paraphrasing	
Summarizing	
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<b>Applying Your Findings</b>	
	Drawing Conclusions
	Making Recommendations
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<b>Planning Informational Reports</b>	
Monitor and Control Operations	Implement Policies and Procedures
Demonstrate Compliance	Report Progress
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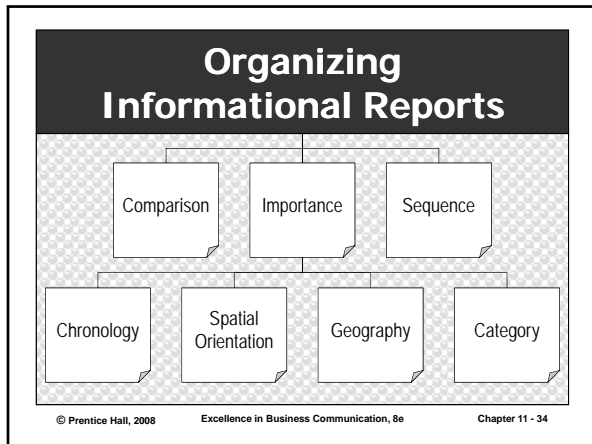
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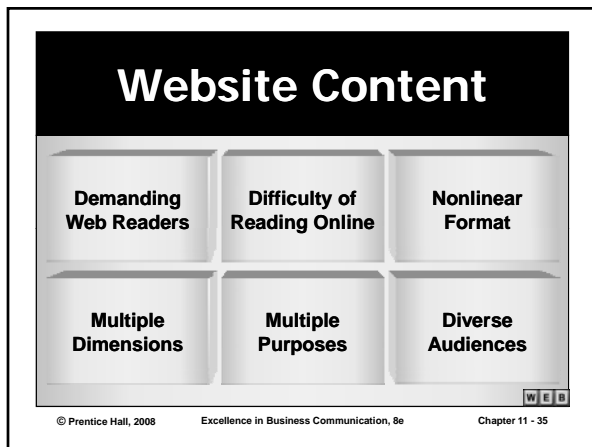
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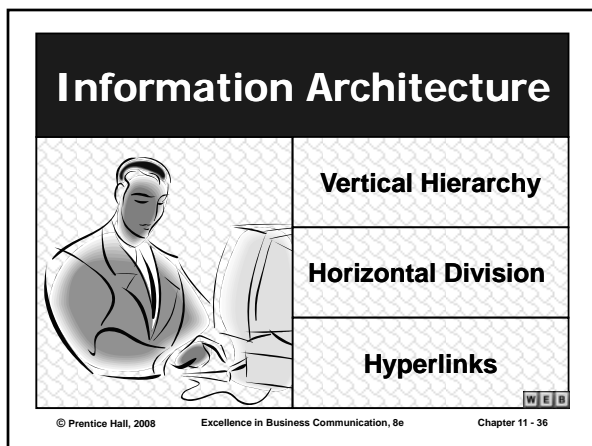
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## Organizing the Site

Site Navigation	
Reader Control	
Information “Chunks”	

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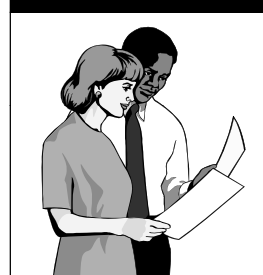
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## Planning Analytical Reports

	Assess Opportunities
	Solve Problems
	Support Decisions

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## Challenges of Analytical Reports

Clarity of Writing	Quality of Reasoning	Responsibility of Persuasion
What must be determined?	Why is this issue important?	Who is involved?
Where is the trouble located?	How did the situation start?	When did it start?

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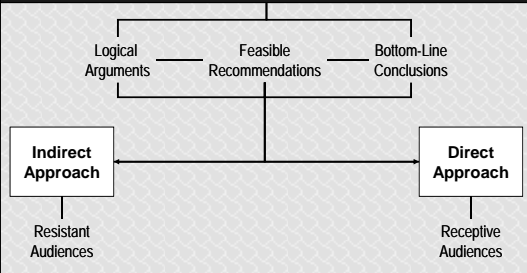
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## Organizing Analytical Reports



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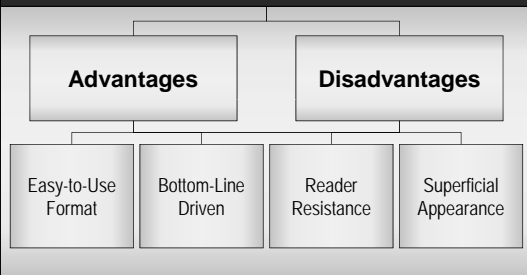
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## Focus on Conclusions



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## Focus on Recommendations

1. Establish the need for action
2. Introduce the overall benefits
3. List the required steps
4. Explain each step more fully
5. Summarize the recommendations

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## Focus on Logical Arguments

2 + 2 = 4 Approach	Yardstick Approach
Introduce Problem/Opportunity	Discuss Problem/Opportunity
Main Reasons for Conclusions	Present Alternatives
Main Reasons for Recommendations	List Decision-Making Criteria
Evidence Behind Reasons	Weigh Alternatives Against Criteria

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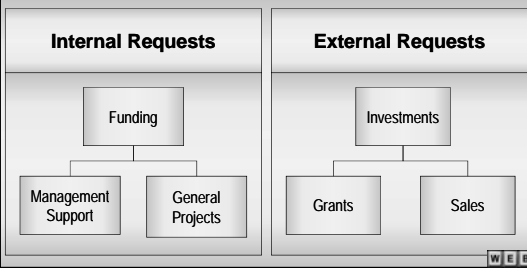
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## Planning Proposals



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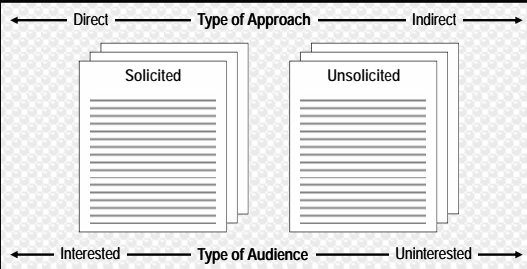
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## Organizing Proposals



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