Param Pujya Dr. Babasaheb Ambedkar Smarak Samiti's

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NAAC Accredited with 'A' Grade

Memo and Reports

Programme Educational Objectives

Our program will create graduates who:

1. *Will be recognized as a creative and an enterprising team leader.*
2. *Will be a flexible, adaptable and an ethical individual.*
3. *Will have a holistic approach to problem solving in the dynamic business environment.*

Business Communication & Information Systems Course Outcomes

- CO1-Given the circumstances, student manager will be able to ascertain the barriers to communication and also propose measures to overcome these barriers.

- CO2 In a given situation, student manager will be able to identify essentials parameters of effective communication and will also be able to justify the same.

- CO3 For given situation student manager should be able to draft Business letter for an organization.

- CO4 Given the circumstances, student manager will be able to draft E-mail to concerned authority/person.

- CO5 Given the circumstances, student manager will be able to gather data and make an informed decision based on it.

- CO6 Student manager will be able to identify & explain modern trends in information system.

What is a memo?

"Memos solve problems"
  - Inform reader of new information
    (i.e., policy changes, etc)
  - Persuade reader to take action
    (i.e., attend meeting, etc)

A memorandum is a short message from one person to another in the same business or organization.

Memorandums are usually referred to as memos.

In-house business letter

Memos have no salutation line and no signature area at the end.

Memo Heading

- The *formal memorandum* uses a special heading, sometimes preprinted on stationery. Typically, words in the memo heading are keyed in ALL CAPS, bold, followed by a colon, and double spaced as follows:

  - **TO**:(Reader's name)
  - **FROM**:(Author's name)
  - **DATE**:(Complete and current date)
  - **SUBJECT**:(What the memo is about)

- Be formal with names and titles
- Be concise with subject line

Format of Memo

- **Purpose of memo**
  - Context and problem
  - Background info

- **Details**
  - Analysis of problem
  - Divide problem

Format of Memo

- **Recommendations**
  - Your solutions
  - Future problems
  - Use lists when possible

- **Closing remark**
  - Courteous ending
  - Consider how action will benefit the reader
  - No signature
  - "I look forward to hear from you…" etc

Format of Memo

- **Attachments**
  - As necessary
  - Include list of attachments in header or bottom of memo
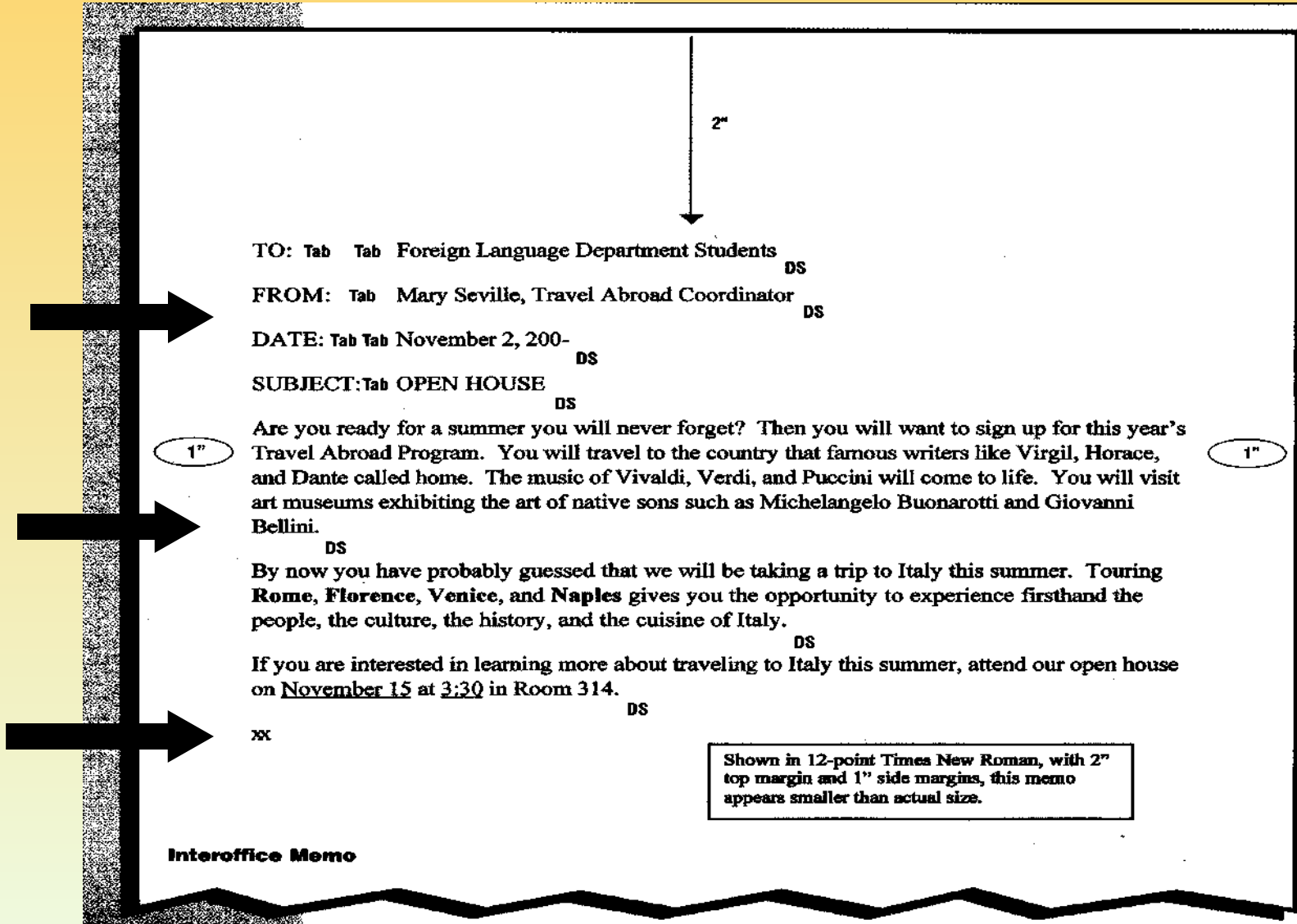
Keep in mind

- Keep it short

- Sentence structure

- Grammar

- Spelling

- Strong, active verbs

- Appropriate vocabulary

- Conciseness

Parts of a Memo

Memo heading →

Memo body →

Typist initials →

2"

TO: Tab   Tab   Foreign Language Department Students
DS

FROM: Tab   Mary Seville, Travel Abroad Coordinator
DS

DATE: Tab Tab November 2, 200-
DS

SUBJECT:Tab OPEN HOUSE
DS

1"   Are you ready for a summer you will never forget? Then you will want to sign up for this year's   1"
Travel Abroad Program. You will travel to the country that famous writers like Virgil, Horace,
and Dante called home. The music of Vivaldi, Verdi, and Puccini will come to life. You will visit
art museums exhibiting the art of native sons such as Michelangelo Buonarotti and Giovanni
Bellini.
DS
By now you have probably guessed that we will be taking a trip to Italy this summer. Touring
Rome, Florence, Venice, and **Naples** gives you the opportunity to experience firsthand the
people, the culture, the history, and the cuisine of Italy.
DS
If you are interested in learning more about traveling to Italy this summer, attend our open house
on November 15 at 3:30 in Room 314.
DS

xx

Shown in 12-point Times New Roman, with 2"
top margin and 1" side margins, this memo
appears smaller than actual size.

Interoffice Memo

Report

What is a Report

- Give a spoken or written account of something that one has observed, heard, done or investigated.

- Business report are a type of assignment in which you analyze a situation (either a real situation or a case study) and apply business theories to produce a range of suggestions for improvement. They are typically assigned to enable you to apply business and management theory to a practical situation.

Types of business reports

- **Informational reports**. These reports present facts about certain given activity in detail without any note or suggestions.

- Such reports are of routine nature. Sometimes they may fall under statutory routine category.

- E.g. A company accounts head asking for expense report of the department within the stipulate period is nothing but informational routine report.

- **Analytical reports**. These reports contain facts along with analytical explanations offered by the reporter himself or may be asked for by the one who is seeking the report.

- Such reports contain the narration of facts, collected data and information, classified and tabulated data and also explanatory note followed by the conclusions arrived at or interpretations

- E.g.-A company chairman may ask for a report on falling trends in sale in a particular area. He will in this case be naturally interested in knowing all the details including that of opinion of any of the investigator.

Research reports.

- **Research reports**. these reports are based on some research work conducted by either an individual or a group of individuals on a given problem.

- E.g.-Indian oil company might have asked its research division to find some substitute for petrol, and if such a study is conducted then a report shall be submitted by the research division detailing its findings and then offering their own suggestions, including the conclusions at which the division has arrived at as to whether such a substitute is these and if it is there can the same be put to use with advantage and effectively.

Statutory reports.

- **Statutory reports**. These reports are to be presented according to the requirements of a particular law or a rule or a custom now has become a rule.

- E.g. The auditor reports to company registrar has to be submitted as per the requirements of country legal requirement.

- A return on compensation paid to factory workers during a period by a factory has to be submitted to competent authorities periodically.

- These reports are generally prepared in the prescribed form as the rules have prescribed.

Non statutory reports

- **Non statutory reports**. These reports are not in the nature of legal requirements or rules wants, therefore, the reports are to be prepared and submitted. These reports are required to be prepared and submitted:
  - for the administrative and other conveniences,
  - for taking decision in a matter
  - for policy formulations,
  - for projecting the future or
  - any thing alike so that efficient and smooth functioning maybe assured and proper and necessary decision may be taken with a view to see that every thing goes well and the objectives of the organization are achieved with assured success.

Special reports.

- **Special reports**. Such a type of report is specially required to be prepared and submitted on matters of special nature.

- E.g. Accident report- Due to an accidental death of the foreman in a factory. The factory manager may ask for a detail report from the head foreman. Such a report is classified as special reports.

- These reports contain not only facts and details but they may contain suggestion, comments and explanations as well.
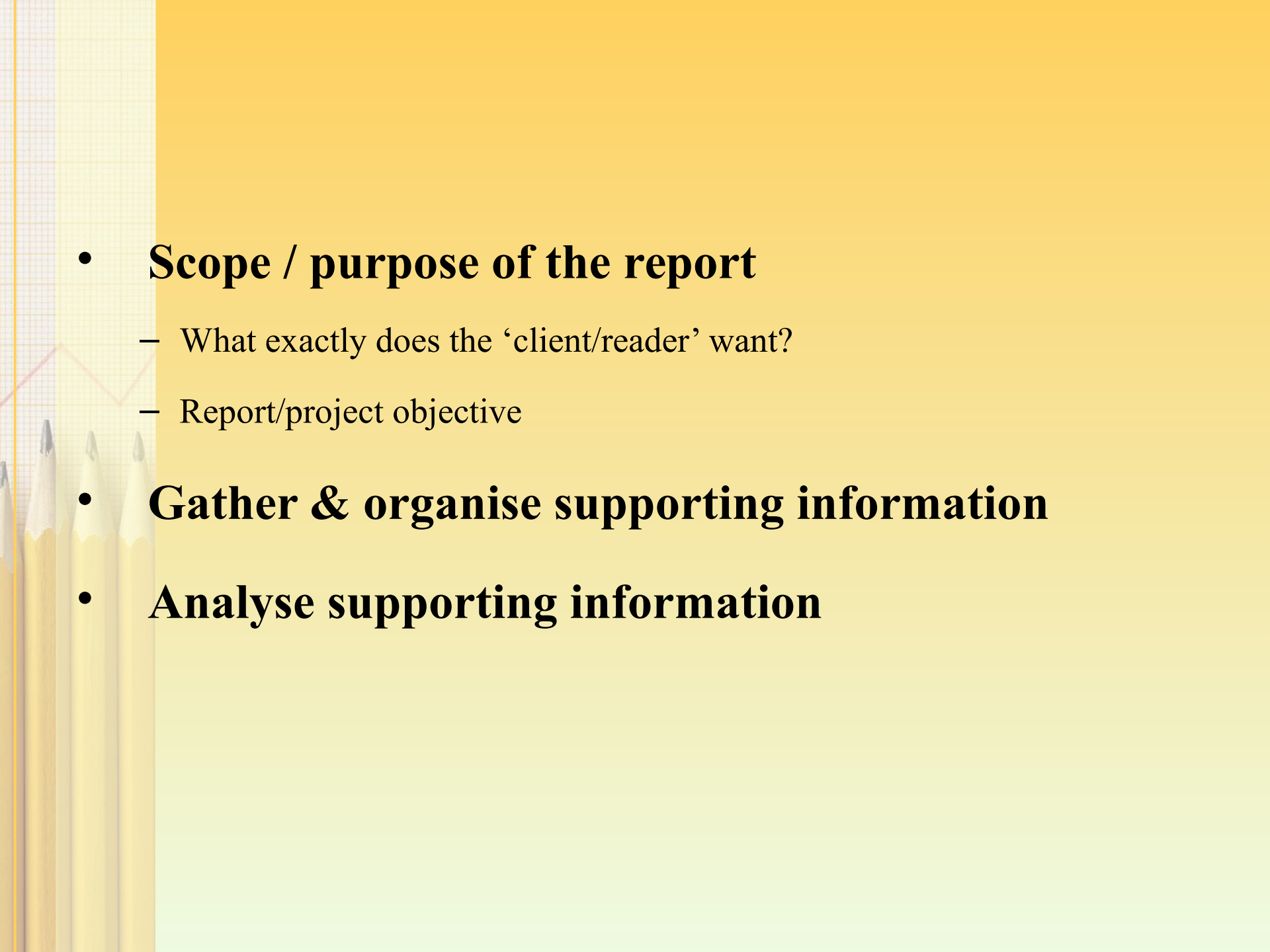
Purpose of a Business Report

- Conveys information

- Assist in decision-making Actual solution

- Past information – future planning

- Business concept

- Management model

Target audience & readers

- Audience is everything
- Format your write up accordingly

- The casual reader/boss who wants the main message as painlessly as possible

- The interested reader who wants more detail but doesn't want to grapple with all the technical details

- The guru who wants the whole story and details of everything

- **To address all 3 audiences effectively,**

  - Include an abstract for the boss

  - A main body for the interested non-specialist

  - A technical appendix for the guru

- **Scope / purpose of the report**
  - What exactly does the 'client/reader' want?
  - Report/project objective

- **Gather & organise supporting information**

- **Analyse supporting information**

Sections in report writing

Sections

- Title Page
- Contents
- Executive Summary
- Introduction
- Main Body/Findings/Discussions
- Conclusions
- Recommendations
- References/Sources
- Appendices

Executive Summary

- **Summary of all of the key points purpose**

- Scope

- Main points

- Conclusions

- Recommendations

Executive Summary

- **Summary of all of the key points**

- Can be read on its own •if appears logical & inline with expectations, recommendations can be followed without need to read further

- Should include summary of all parts *including recommendations*

- Most important part of the report & written last

Introduction

- **States Purpose & scope**

- Main points
- Structure of the Report

- **Why the report is being written (objective).**

- Solve a business problem
- Recommend alternative approach
- Increase profits

Main Body of Report

- State how it is organised up front

- Headings clearly identify content

- Presented in an order that leads logically towards conclusion/recommendations

Main Body of Report

For example:

1. Research

2. Analysis

3. Assumptions

4. Evaluation

5. Findings

6. Graphs

7. Diagrams

Conclusion

- Summarise the main body –

- Do not include diagrams or graphs

- Should be short

- Clearly follow order of findings -lead naturally into recommendations.

Recommendations

- ALL include recommendations (or at least suggestions).

- At least an indicator of what benefits/results of implementation Return on Investment etc.

- **Couple of approaches:**

  - Decision: Decision has positive & negative Show likely benefits, costs, risks etc
  - Present your suggested 'best' option first

    - **Suggestion:** Suggest ideas that should be considered

    - **Benefit:** Strongly advocate idea to be implemented

Final Components

- **References/Sources**
- **Appendices**
  - Survey examples
  - Transcripts
  - Detailed documentation
  - Other reports of relevance/related

Writing Business Reports

Writing Business Reports

Part One: Steps in Preparing Proposals and Reports

1. **Defining the problem**
   - Limiting the scope of the study
   - Outlining issues for investigation
2. **Outlining issues for analysis**
   - Informational assignments
   - Analytical assignments
3. **Preparing the work plan**
   - Statement of problem
   - Statement of purpose and scope of investigation
   - Discussion of tasks, methods, and constraints
   - Description of end products
   - Review of assignments, schedules, resource requirements

Writing Business Reports

Part Two: Conducting the Field Research

4. Conducting the research
- Reviewing secondary sources
- Collecting primary data
  - Documents
  - Observations
  - Surveys

    a. Interviews
    b. Questionnaires
    c. Experiments

Writing Business Reports

5. Analyzing data

Analyzing data: Quantitative analysis by Calculating statistics

- Averages
- Trends
- Correlation

Qualitative analysis by using SWOT framework

- Strengths
- Weaknesses
- Opportunities
- Threats

Writing Business Reports

6.   Drawing conclusions and developing recommendations

A. Drawing conclusions
- Definition
- Example
- What constitute a sound conclusion

B. Developing recommendations
- Definition
- Example
- What are useful recommendations

Writing Short Business Reports

Part Three: Writing Proposals and Reports
 VII. Writing reports and proposals

A. Choosing proper degree of formality

1. Formal tone
  2. Informal tone

B. Organizing reports: Components of a formal report

1. Preliminaries (prefatory parts)
2. Body (text of the report)
3. Supplements

Writing Short Business Reports

1. Developing structure clues
   - . Opening
   - . Headings and lists
   - . Transitions
   - . Previews and reviews
   - . Ending

2. Letter of Transmittal (included for reference only)

3. Executive Summary

Solicited Proposals

- Are prepared at request of clients

- Meet specifications spelled out in request for proposal (RFP)

- Involve in direct competition with other vendors

- Use a standard organization (purpose of proposal, scope of work, background of problem, limitations, proposed effort, methods, schedule, facilities, equipment, personnel, costs, key points, action ending)

Unsolicited Proposals

- Are initiated by seller without invitation from client

- Face no direct competition from other sellers

- Succeed only if client is convinced of need for action

- One important type of unsolicited proposal, the business plan, is used to get funding from outside investors or lenders

Steps in Preparing a Proposal & Report

Defining the Problems ⇩	• **Establish the scope of the investigation** • **Avoid defining errors** - **Why are we having trouble in hiring?**

Outlining Issues for Analysis ⇩	• **Informational assignment**
	• **Analytical assignment**
	    - **Are salaries too low?**
	    - **Is our location poor?**
	    - **Is the supply of secretaries diminishing ?**

Preparing the Work Plan ⇩	• **Explain how the problem is to be solved (steps; time; method)**
Doing the Research ⇩	• **Reviewing the secondary data** • **Collecting primary data**
Analyzing the Data ⇩	•**Statistical analysis** • **Conclusions** • **Recommendations** • **Implications / Actions**
Writing Reports or Proposals	• **Formality** • **Consistency in time perspective** • **Structure**

Outlining Issues for Analysis

Informational assignments (very little analysis or interpretation)	• Sequentially: study a process; proceed step-by-step: 1, 2, 3… • Chronologically: when investigating a chain of events; January, February… • Geographically: factoring the study geographically, such as US—by region • Categorically: Reviewing several distinct aspects of a subject; Sales, Profit, Cost…
Analytical assignments (analyses, conclusions, or recommendations)	• Problem-solving methodology • Hypotheses: to discover causes, predict results, identify solution to problem (empirical) • Relative merits: to compare alternatives against criteria

The Problem-solving Process

1. Recognize and define the problem

2. Select a method of solution
   a. Library research (secondary data)
   b. Normative survey
   c. Observational analysis
   d. Experimentation

   (primary data)

3. Gather and analyze the findings

4. Arrive at an answer (conclusion)

Preparing the Work plan

Written work plan for a major investigation should include:

1. **Statement of problem** or needs assessment (overview the current situation; identify key issues)

2. **Statement of purpose and scope of investigation**

3. Discussion of sequence of tasks, methods, and constraints / limitations

4. Description of end products that will result from the study (what to be expected)

5. Review of assignments, schedules, resource requirements

6. Plans for following up after the report is delivered

Preparing the Work plan (cont'd)

<u>Example 1:</u>

<u>Statement of problem</u>

- Our company's market share is steadily declining.

<u>Statement of purpose and scope of investigation</u>

- To explore different ways of selling our products and to recommend the one that will most likely increase our market share by 6%.

Example 2:

Statement of problem

- Our current computer network system is inefficient and cannot be upgraded to meet our future needs.

Statement of purpose and scope of investigation

- To analyze various computer network systems and to recommend the system that will best meet our company's current and future needs.

Statement of problem or needs assessment

- Ex: Our current computer network system is inefficient and cannot be upgraded to meet our future needs.

Statement of purpose and scope of investigation

- To analyze various computer network systems and to recommend the system that will best meet our company's current and future needs.

Preparing the Work plan (cont'd)

Example 3:

Statement of problem

- We need $2 million to launch our new product.

Statement of purpose and scope of investigation

- To <u>convince</u> investors that our new business would be a sound investment so that we can obtain desired financing.

Example 4:

Statement of purpose and scope of investigation

- …to <u>analyze</u> the travel and entertainment (T&E) budget, <u>evaluate</u> the impact of recent changes in airfares and hotel costs, and <u>suggest</u> ways to tighten management's control over T&E expenses.

Conducting the Research

Reviewing the secondary sources	•**Commonly used in business research** • **Popular publications** • **Government documents** • **Annual reports**
Collecting primary data	• **Documents: company files** • **Observations** • **Surveys** • **Experiments: through controlled testing**

Three Decisions Must Be Made Before Conducting a Survey

1. Should you use face-to-face interviews, phone calls, or printed questionnaires?

2. How many people should you contact to get reliable (reproducible) results, and who should they be? (For generalizability — 100+)

3. What specific questions should you ask to get a valid (true) picture?

Analyzing Data: Quantitative

Average	Mean	Sum Useful when you want to compare one item or individual with the group
	Median	Number in the middle of the list Useful when one or several or the numbers are extreme Can be misleading if one of the numbers is extreme
	Mode	Most frequently occurring number Useful when you want to know what case you are most likely to encounter
Trend (Line graph)	Pattern exhibited by data over a period of time Not affected by extreme numbers	
Correlation	Consistent relationship between variables. Not necessarily indicate the cause and effect Ex: Lung Cancer Patients vs. Smokers	

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Analyzing Data: Qualitative

SWOT(TOWS) Framework

Strength(s)

Weakness(es)

Opportunity(ies)

Threat(s)

Reporting Findings

A <u>FINDING</u> from a research study is a <u>specific</u>, <u>measurable</u> fact.

<u>Example 1:</u>

Nearly 75 percent of the recruiters responding indicated they were more likely to hire a candidate who was involved in extracurricular activities.

<u>Example 2:</u>

Only 16 percent of the consumers interviewed knew that Hason's Toy Company sells education computer software.

Drawing Conclusions

- **Interpretations of what the facts mean, which are influenced by assumptions and value judgments**

- A sound conclusion:

  1. Fulfills the **original** statement of **purpose**

  2. Is based **strictly** on the information included in the rest of the report

  3. Is **logical**

Drawing Conclusions (cont'd)

Conclusion	What all facts add up to; derived from findings
	Interpretation of what information means
	EX: On the basis of its record and current price, I conclude later this company is an attractive buy.
	EX: The findings of this study lead to the following conclusions.

Developing Recommendations

Recommendations	What should be done in light of facts and their meanings; a suggested action based on your research
	EX: I recommend that we write a letter offering to buy the company for $3 million.
	EX: Based on the conclusion of this study, the following recommendations are made.

Useful Recommendations:

1. Lead to real improvements (practical)
2. Are financially and politically feasible and viable
3. Are based on logical analysis and sound conclusions
4. Take into account **all** obstacles (limitations)
5. Provide alternatives by analyzing the Pros & Cons of each alternative
   - Good strategy
   - Politically sensitive issue(s)
   - Objectivity
6. Indicate what should happen next and who should do what

Finding, Conclusion and Recommendation

<u>Example 1:</u>

Finding:
Nearly 75 percent of the recruiters responding indicated they were more likely to hire a candidate who was involved in extracurricular activities.

Conclusion:
Active involvement in extracurricular activities is an important job-selection criterion.

Recommendation:
Students should be involved in several extracurricular activities prior to seeking a job.

Finding, Conclusion and Recommendation (cont'd)

Example 2:

Finding:
Only 16 percent of the consumers interviewed knew that Hason's Toy Company sells education computer software.

Conclusion:
Few consumers are knowledgeable of our line of educational software.

Recommendation:
An advertising campaign focusing on educational software should be launched.

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Choosing the Proper Degree of Formality

Readability (Unity)	Be consistent in handling of time, place, point of view, subject and tone
Formality	Informal tone – appropriate for letter and memo reports sent to a familiar audience Formal tone – appropriate for formal reports submitted to unfamiliar or high-ranking audiences Corporate culture affects: Action-oriented – written in direct order; employed a crispy and efficient style People-oriented – written in indirect style, and the tone is polite and tentative

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Organizing Reports: Components of a Formal Report

Prefatory Parts	
	• Cover
	• Title fly (optional)*
	• Title page
	• Letter of Authorization*
	• Letter of Acceptance*
	• Letter of Transmittal
	• Table of Contents
	• List of Illustrations (if any)*
	• Synopsis or Executive Summary

Organizing Reports: Components of a Formal Report (cont'd)

Text of the Report	▪Introduction ▪Body ▪Summary ▪Conclusions ▪Recommendations ▪Notes (optional)
Supplementary Parts	▪Appendices ▪Bibliography ▪Index (optional)

Developing Structure Clues

Prevent the reader from getting lost (long reports)

Five structural clues used in reports:

Opening	◆Introduces subject and previews main ideas ◆ Phrased to match audience's receptivity ◆ Uses informative approach for receptive audience and descriptive approach for skeptical audience
Headings and lists	◆Provide visual clues and help readers scan document ◆ Are phrased in grammatically parallel terms ◆ Follow company format ◆ Use consistent pattern to emphasize key points and show sequence

Developing Structure Clues (cont'd)

• **Transitions**	◆ **Connect one idea to next** ◆ **Link major sections and serve as mini introductions**
• **Previews and Reviews**	◆ Help readers place information in perspective with regard to the rest of the paper ◆ Summarize what has been discussed and introduce what will be discussed next
• **Ending**	◆ Recapitulates main points in order ◆ Emphasizes conclusions and recommendations (in analytical reports)

Letter of Transmittal

- A separate business letter attached to the front   cover of the bound proposal document
- Introduces the proposal document to the client in response to the client's request
- Contains an even shorter version of the abstract   and is signed by the supervising officer of the   proposing team

(for reference only)

Letter of Transmittal

October 27, 200-

Mr. Sigi Bergman, Chairman
Research Committee
X Company
1806 Woodward
Detroit, MI 48209

Dear Mr. Bergman:

Authorization

Purpose

As requested in your memo of September 17, 200-, we, the appointed Orphan Drug Committee, have completed the assigned task: "What Policy Should Our Company Adopt in Ensuring the Availability of Drugs of Limited Commercial Value?"

Highlights

As staff members we realized the importance of the question and devoted considerable effort to (1) providing background for the issue and (2) offering several options before ending with a recommendation.

Letter of Transmittal (cont'd)

Procedure

While our bibliography suggests the wide spread of research, we wish to thank the staff of our library, our marketing department, and our legal department for giving effort to a project beyond their daily roles. All transcripts, video taped interviews, and other printed material are noted in the appendix but are also on file in the office of the committee chairman. We hope you find this report, along with the final recommendation, informative and enlightening.

Courteous Close

If you have any inquiries or would like to discuss the topic before our group presentation on October 27, 200-, please contact me at Extension 4567.

Sincerely,

Joseph Haviv, Chairman

(For reference only)

Executive Summary

The purposes of this report are (1) to determine the Sun Coast University campus community's awareness of the campus recycling program and (2) to recommend ways to increase participation. Sun Coast's recycling program was intended to respond to the increasing problem of waste disposal, to fulfill its social responsibility as an educational institution, and to meet the demands of legislation that made it a requirement for individuals and organizations to recycle.

A Survey was conducted in an effort to learn about the campus community's recycling habits and to assess current participation in the recycling program. A total of 220 individuals responded to the survey, but 27 surveys could not be used. Since Sun Coast University's recycling program includes only aluminum, glass, paper, and plastic at this time, these were the only materials considered in this Study.

Source: Guffey, M. E. (2004). *Essentials of business communication* (6th ed.). International Thomson Publishing.

Reference

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- Roy W. Poe, Rosemary T. Fruehling Business Communication- Fifth edition, paradigm Publication Inc.
- Williams, Krizan, Logan, Merrier, Communication In Business; Cengage learning.