# Writing the Report

## General Instructions

### Preparation

First, review the information on outlines in *Organizing, Researching, and Illustrating Your Material.* Next, review the instruction on informal and formal reports and format in this study unit. Then carefully reread the information about field-investigation reports, pages 7–11. You'll be building on the background information, prewriting, memo, and letter about Phoenix Advertising you prepared for the exams in *Writing Effective Communications* and *Organizing, Researching, and Illustrating Your Material,* so make sure you've completed those exams already. Carefully review the background and prewriting work on which you based your exam for *Organizing, Researching, and Illustrating Your Material.*

### Background

The following is the basic scenario, with which you're familiar.

Phoenix Advertising, with its main headquarters in Charlotte, North Carolina, serves clients that include banks, insurance companies, and retail chains. You're vice president of human resources management at Phoenix and report directly to Gregory S. Forest, the company president. Mr. Forest advises you that in the last month, four clients have complained about the advertising work produced by the Roanoke, Virginia branch of the agency. He reminds you that the clients served from the Roanoke branch are vital to the overall success of Phoenix Advertising.

Mr. Forest also explains the little he's been able to learn about the situation at the branch: In the last three months, two of the top management people—an art director and an

account executive—have left the agency. Three of the graphic designers and four of the copywriters are threatening to quit because they feel their creative efforts are being rejected or revised without consultation. They want to be part of a collaborative team, not to simply produce work that the art directors and account executives can arbitrarily alter.

In an attempt to increase revenues, the branch is accepting new clients without evaluating the effects of the new accounts on the current project workload. As a result, without notice or compensation for the additional hours, all salaried employees are required to work long hours several days each week. Employee morale and productivity are declining day by day.

Your investigative goals are to

- Identify and describe specifically the causes (root issues underlying) each problem
- Show the impact of each problem on the business and on employee morale
- Provide specific recommendations for resolving the problems to restore the Roanoke branch to full productivity

## Process

### Part A: Topic Outline

Prepare a topic outline (no sentences) using the four Roman numeral points shown below. Organize all of your prewriting and scenario information according to those four points. Subdivide as needed. Your outline must show depth of detail, as well as correct format. Remember, you're preparing this outline after you've finished your investigation of the site in order to organize your thoughts for your report.

Your first Roman numeral point requires no subdivision; it merely states the purpose of the field investigation and gives the location. For the other points, add appropriate subdivisions and a significant number of details beyond the scenario based on your brainstorming. Remember that if you subdivide a point, you must have at least two divisions. For example, if you subdivide to level 1, you must have at least a 2 as well. You can't subdivide something by one. The following partial outline will guide you, but don't be limited by the capital letters or numbers. Subdivide each level more or less as necessary to incorporate all your ideas.

Revise your outline for clarity and completeness. Make sure

## GUIDELINES FOR WRITING YOUR OUTLINE

**When you write your outline, begin with the four points listed as Roman numerals, then subdivide and add details.**

I. Purpose for investigating, including the location, the branch, and general nature of the problems

II. General approach to investigating the causes of each problem
   A. One way you investigated the problem, such as interviews (subdivide two or more levels as needed)
      1. Four of the ten employees from the Graphics and Design Department
      2. Head of the graphics department
      3. All ten employees during a group meeting
   B. Another way you investigated the problem [subdivide as needed]
   C. Another way you investigated the problem [subdivide as needed]

III. Overall findings about the underlying issues (primary findings as capital letters and specifics about that finding as numbers)
   A. First primary issue matched with first investigation method
      1. One cause of the problem and/or the impact on business/morale
      2. Another cause/impact
      3. If appropriate, another cause/impact
   B. Second primary issue (i.e. lack of communication)
      1. Cause/impact
      2. Cause/impact
   C. Third finding/issue subdivided as necessary
   D. Continue to subdivide Roman numeral Point III to identify all your findings

IV. Overall recommendation for/approach to solving the issues you found
   A. Recommendation 1 (match with issue identified in IIIA.)
      1. Details
      2. Details
   B. Recommendation (issue IIIB)
   C. Recommendation (issue IIIC)

your points follow each other in logical order and address the four Roman numeral points in the example. Make sure the topics within the subdivisions (A, B, C or 1, 2, 3) are of equal importance. Use parallel grammatical structure for each point. Subdivide a point only if you can provide at least two subdivisions. Otherwise, don't break down the point further.

- For Point I, did you state the purpose and branch location without subdivision?
- For Point II, did you list a variety of specific investigative methods-including with whom, where, when?

- In Point III, did you specify causes for each problem and show the impact of the problem (effect) on morale and productivity?
- In Point IV did you provide clear solutions that address each cause in the same order as you listed in III?

**Part B: Informal Field-Investigation Report**

Begin a new page in the same Word document. Follow your outline as you draft your informal report using the basic memo format. Use the ABC method for developing paragraphs and the headings shown in the sample field-investigation report in this study unit. Your purpose is to inform the Phoenix executive team about your investigation and recommend solutions for the problems at Roanoke. After providing your purpose statement and location of the branch, use the following along with your outline to write your report.

1. For the Description of Investigation section, describe in complete sentences and paragraphs the ways you investigated the problems to find the causes of each problem and their impact on business/morale. This section must describe a variety of objective, specific methods used, such as interviewing employees and management, survey, attendance records, observation of office, budget review. Use different methods to verify facts and causes—don't use just an employee's word or feeling.
2. In the Results section, write a numbered list of findings using complete sentences in which you fully identify the source of the causes underlying each problem and show the impact of each cause on employee morale/business. Provide a clear analysis of each problem in the scenario—identify the causes underlying each and describe the impact on the company. Don't merely summarize the scenario. By showing the underlying issues connected to specific impact/results, you establish a basis for your recommendations and show you're addressing the root of the problems. You'll probably need more than one sentence for several of your findings.
3. For your Conclusions section, clearly summarize the primary causes for the problems and their impact on business/morale. Use complete sentences and one or two paragraphs.
4. For the Recommendations section, list detailed solutions connected to the root cause of each problem, which you

identified in the Results section. Define specific procedures or processes that Phoenix must undertake to boost morale and profitability. List each recommendation in the same order as the causes you defined in Results. You may use imperative or declarative sentences.

### Revising

Carefully revise your work according to the exam instructions and the evaluation criteria for this exam. Revise for clarity, content, and coherence. Edit grammar, spelling, and punctuation thoroughly.

Read through your work backwards, first word by word, then sentence by sentence, and then paragraph by paragraph.

***Word by word.*** In this way you can locate spelling errors. Be alert—you may see the word *here* in your essay, a correctly spelled word. But also check the words on either side. Did you mean *here* in terms of location or did you mean the sense of hearing?

***Sentence by sentence.*** By looking at each group of words separately from the context, you can more easily locate run-ons or fragments. You also need to compare the length and structure of each sentence for variety. Also check the connections between sentences-have you provided your reader coherence?

***Paragraph by paragraph.*** Locate the controlling idea of each paragraph and compare with your primary focus for the letter. Does the paragraph help to develop that focus in some specific way? Then match controlling ideas of each paragraph to the one before it and the one after it. Do they follow in logical order?

## Evaluation Criteria

**The school will use the following criteria to evaluate your written work:**

**Topic Outline (15 points)**

How well did you apply required topic outline format, cover scenario, and parallel results with the recommendations?

**Purpose and facility (5 points)**

Did you provide a clear purpose statement and a designate facility?

**Description of investigation (5 points)**

How completely and objectively did you describe your investigative approach?

**Results (15 points)**

How well did you detail specific cause and effect links with verifiable proof for the scenario?

**Conclusion (10 points)**

How well did you detail specific cause and effect links with verifiable proof for the scenario?

**Recommendations (15 points)**

Did you parallel your recommendations with the results? Do your suggestions identify a specific action that solves underlying issues?

**Audience, coherence, and tone (10 points)**

Did you maintain a professional tone as part of a company team and develop the information logically?

**Report format (5 points)**

How well did you apply the sample memo format with headings?

**Grammar, sentence structure, and mechanics (15 points)**

How well did you edit and proofread your document to ensure correct application of standard written conventions for American English?

**General format (5 points)**

Did you correctly include and format the font, justification, and header information?