

# **Chapter 11 Study Guide**

## **Organizing and Preparing Reports and Proposals**

### **IN THIS CHAPTER YOU WILL FIND:**

LEARNING OBJECTIVES  
KEY CONCEPTS  
KEY TERMS  
CHAPTER OUTLINE  
POWERPOINT SLIDES  
TEACHING SUGGESTIONS  
CLASSROOM ACTIVITIES  
REVIEW QUESTIONS & SUGGESTED ANSWERS  
FEATURED ASSIGNMENTS  
ADDITIONAL ASSIGNMENTS  
CASE ASSIGNMENTS

### **LEARNING OBJECTIVES**

- 1** Identify the parts of a formal report and the contribution each part makes to the report's overall effectiveness.
- 2** Organize report findings.
- 3** Prepare effective formal reports using an acceptable format and writing style.
- 4** Prepare effective short reports in memorandum, email, and letter formats.
- 5** Prepare effective proposals for a variety of purposes.

## KEY CONCEPTS

The structure and the preparation of various types of reports are presented including formal reports, letter reports, memorandum reports, and proposals. The problem-solving, research-based orientation of reports is emphasized for each of the various types.

## KEY TERMS

TERM	PAGE	TERM	PAGE
Addenda	186	Justification report	188
Analytical report	186	Preliminary parts	183
Executive summary	185	Short reports	192
External proposal	199	Solicited proposals	200
Form reports	192	Unsolicited proposals	200
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## CHAPTER OUTLINE

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## CHAPTER REVIEW

1. **How does a report writer decide the best organization for a formal report and determine which preliminary or addenda parts to include in a report?**

Determining the best organization pattern for a formal report depends in the needs and expectations of the receiver. Generally, longer, more formal reports typically have more preliminary and addenda parts than do shorter, less formal reports, but not every formal report has all of the

preliminary and addenda parts. Again, the parts needed depend on the needs of the sender and the receiver.

- 2. How does a report writer decide the best organization for a formal report and determine which preliminary or addenda parts to include in a report?**

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- 3. Briefly discuss the primary principles involved in writing an executive summary. What is the significance of other names given to this preliminary report part?**

The executive summary, also called the abstract, overview, or précis, summarizes the essential elements in the entire report. The executive summary presents the report in miniature. It should briefly introduce the report and preview its major divisions, summarize the major sections of the report, and summarize the report summary and any conclusions and recommendations. Concise sentences should be used, and little attention should be given to supporting details and background information. The other names given to this summary would be used when the summary is not necessarily for the chief executive of a company. Abstracts are often used to overview research and new related articles. An overview can be used to summarize any type of report, and a précis provides more of an outline than a summary.

- 4. What purposes are served by the findings, conclusions, and recommendations sections? How are they related, yet distinctive?**

Findings are the facts (evidence) uncovered by the research. Conclusions are interpretations of the findings. Recommendations present the writer's opinion on a possible course of action based on the conclusions. The summary, conclusions, and recommendations can be placed in three separate sections for a long report. For shorter reports, the conclusions and recommendations can be combined into one section, or all three sections can be combined.

- 5. Give two or three examples of emotional terms that should be avoided in a formal report. Why is impersonal, third person style frequently used in formal reports? How is it achieved?**

Fantastic, superb, brilliant, sensational, stupendous, dismal, and miserable are examples of emotional adjectives. Emotional phrases could include such things as "the results were fantastic," "extensive research was conducted," and "an exhaustive list of resources." Emotional terms take attention away from the information presented and turn it toward your own feelings. Readers are more likely to accept your work as valid and reliable if you remain unbiased and neutral in your word choices.

- 6. Explain the relationship between the content outline of a report and the placement of headings within the body of a report.**

Headings take their position from their relative importance in the outline. For example, in a Roman numeral outline, "i" is a first-level heading, "a" is a second level heading, and "1" is a third-level heading.

**7. In addition to length, what are the differences between long and short reports?**

Length is the primary difference between long and short reports. Short reports also tend to be less formal and may be prepared in a letter, memo, or email format. Long reports tend to have more preliminary and addenda pages than do short reports.

**8. How are memorandum, letter, and email reports similar? In what ways are they different?**

All are formats frequently used when preparing short reports. Memorandum reports are prepared for internal audiences (those within the organization), while letter reports are prepared for external audiences (those outside the organization). Email reports can be directed to either internal or external audiences.

**9. What is the primary purpose of a proposal, and what can the writer do to assure that the purpose is achieved?**

The primary purpose of an external proposal is to win business; an internal proposal's purpose is to justify or recommend purchases or actions in the company. The writer helps to assure that the purpose is achieved by selling the party on the value of the idea and the ability of the bidder to perform.

**10. What is meant by RFP? Why is it important to the preparation of a proposal?**

RFP means "Request for Proposal." The RFP describes the problem to be solved and invites respondents to describe their proposed solutions.

**11. How does team preparation of a proposal differ from preparation by an individual? How can technology assist in team writing?**

Original writing of sections of a long proposal is typically divided among the members of a collaborative-writing team. Because reports and proposals consist of rather discrete parts, experts in each area of the proposal compose their specific sections independently. One person then compiles all the sections, creates the preliminary and addenda parts, and produces and distributes the final copy. Technology can assist in team-writing by allowing team members to access all parts of the proposal at any time, by providing a work schedule for team members and proposal parts, by allowing online, real-time discussions of the proposal through chat or instant messaging, and by providing a channel for sending documents without having to wait for shipping.

**12. How do diversity considerations impact the choices made in report style and and format?**

In choosing a style and format, a writer must consider the audience so that the report can be tailored to his/her needs. Education level, socio-economic status, cultural background, and personal reading preferences all should be considerations, as should cultural preferences for certain formats and writing styles.

## STUDY QUESTIONS

### Chapter 11—Organizing and Preparing Reports and Proposals

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#### TRUE/FALSE

1. The need for preliminary and addenda items is influenced by the length of the report and its formality.

ANS: T                      PAGE: 183

2. Word processing software can simplify the tedious task of creating a table of contents.

ANS: T                      PAGE: 184

3. An executive summary should only be used for long and complex reports.

ANS: F                      PAGE: 185

4. An abstract, or executive summary, summarizes the findings section of the formal report but does not mention the recommendation(s).

ANS: F                      PAGE: 185

5. Conclusions are drawn by inference from research findings, while recommendations are the writer's opinion of what action should be taken based on the conclusions.

ANS: T                      PAGE: 186

6. When the reference list of a report includes sources not cited in the report, it is referred to as a bibliography or works consulted.

ANS: T                      PAGE: 187

7. An appendix contains supplementary information that supports the report but is not appropriate for inclusion in the report itself.

ANS: T                      PAGE: 187

8. Businesses often develop their own report styles which may differ from standard style manuals.

ANS: T                      PAGE: 188

9. Talking headings are preferred in business reports because they tell about the content of the sections and reveal any conclusion(s) presented in the sections.

ANS: T                      PAGE: 189

10. All report headings that are of the same level must be consistent in positioning, appearance, and grammatical construction.

ANS: T PAGE: 190

11. The use of first-person pronouns (*I* or *we*) are generally acceptable in a formal report.

ANS: F PAGE: 190

12. “Authorization was received from the IRS” is an example of a sentence using active voice.

ANS: F PAGE: 190

13. When designed correctly, form reports save time and increase clerical accuracy over individually prepared reports.

ANS: T PAGE: 192

14. The most widely used report format for communication within an organization is the letter report.

ANS: F PAGE: 192

15. When a consultant proposes a program to a client, the most suitable report form is a memorandum report.

ANS: F PAGE: 192

16. A report that recommends to management the installation of a new computer system is an example of an internal proposal.

ANS: T PAGE: 199

17. A report that recommends to management the adoption of a particular cell phone plan for company employees is an example of an internal proposal.

ANS: T PAGE: 199

18. An unsolicited proposal is prepared by an individual or firm that sees a problem to be solved and submits a proposal for consideration.

ANS: T PAGE: 200

19. An RFP describes a problem that needs to be solved and invites respondents to describe their proposed solutions.

ANS: T PAGE: 200

20. With team-prepared proposals, the whole team typically works together on each section of the proposal.

ANS: F PAGE: 202

## **MULTIPLE CHOICE**

1. Which of the following is *NOT* true concerning the table of contents of a report?
  - a. The contents page includes the beginning and ending page numbers for report parts.
  - b. Leaders are used between the report part and the page numbers to assist the reader's eyes in moving across the page.
  - c. Word processing software programs can generate a table of contents automatically.
  - d. The list includes the name and location of every report part except those that precede the contents page.

ANS: A                      PAGE: 184

2. The executive summary in a formal report should
  - a. briefly introduce the report and preview the major divisions.
  - b. summarize the major sections of the report.
  - c. summarize the report summary and any conclusions and recommendations.
  - d. accomplish all of the above.

ANS: D                      PAGE: 185

3. Which of the following is *NOT* true of the executive summary?
  - a. It provides an overview of the essential elements in an entire report.
  - b. It includes the table of contents.
  - c. It summarizes the recommendations.
  - d. It previews the major report divisions.

ANS: B                      PAGE: 185

4. An analytical report
  - a. is designed to solve a specific problem or answer research questions.
  - b. draws inferences in its body and therefore does not have a conclusions section.
  - c. neither a nor b is correct.
  - d. both a and b are correct.

ANS: A                      PAGE: 186

5. Which of the following is correct concerning the analysis sections of a formal report?
  - a. An informational report typically ends with recommendations and has no summary or conclusions.
  - b. An analytical report typically has no summary or conclusions and ends with recommendations.
  - c. For short reports, the writer may place the summary, conclusions and recommendations together in one section.
  - d. None of the above is correct.

ANS: C                      PAGE: 186

6. Which of the following best describes the purpose of an analytical report?
  - a. To solve a specific problem or answer research questions
  - b. To provide information on a specific problem
  - c. To provide information and summarize findings of research
  - d. To compare and contrast research on similar problems related to the topic

ANS: A                      PAGE: 186

7. Which of the following statements is *NOT* correct concerning the appendix of a report?
- a. Each report contains only one appendix, although several things may be placed in it.
  - b. The appendix is a good place to put lengthy material that is related to the information in the body.
  - c. Each item in the appendix must be mentioned in the report.
  - d. The appendix may include questionnaires, summary tabulations, legal documents, or mathematical computations.

ANS: A                      PAGE: 187

8. Which of the following is *NOT* true of the parts of a business report?
- a. The table of figures includes a reference to each figure that appears in the report.
  - b. The table of contents gives the reader an overview of the report.
  - c. The executive summary summarizes the essential elements of the entire report.
  - d. The appendix includes the references and the index.

ANS: D                      PAGE: 187

9. The content outline of a report
- a. is a formal section of the report that serves to define and organize the content.
  - b. is an optional prerequisite to writing a formal report.
  - c. is a planning document that is subject to modification as the writer develops the report.
  - d. must have three major points.

ANS: C                      PAGE: 188

10. Which of the following is applicable to the development of headings for a report?
- a. Something must divide into at least three parts or it should not be divided into subdivisions.
  - b. Headings at the same level must use consistent grammatical construction.
  - c. Headings at the same level must be consistent in font and type style.
  - d. B & C are correct.

ANS: D                      PAGE: 190

11. A typical short report includes
- a. a personal writing style using first or second person.
  - b. no graphics.
  - c. no contractions.
  - d. only one heading per page.

ANS: A                      PAGE: 192

12. Which of the following is *NOT* a benefit of form reports?
- a. Increase clerical accuracy
  - b. Save time for the preparer
  - c. Make data tabulation easier
  - d. Increase personalization

ANS: D                      PAGE: 192

13. Which of the following guidelines is appropriate when preparing memo and letter reports?
- a. Use personal writing style, including first- and second-person language.



- b. Use deductive approach, regardless of the type of message.
- c. Avoid the use of headings and subheadings.
- d. All the above are appropriate.

ANS: A                      PAGE: 192

14. Which of the following statements is correct concerning the writing of proposals?
- a. Proposals are always directed to an external audience.
  - b. Proposals are only written in response to solicitations or request for proposals.
  - c. A simple price quotation may constitute a proposal.
  - d. All of the above are incorrect.

ANS: C                      PAGE: 200

15. Which of the following is the *BEST* advice for including objectives in a proposal?
- a. List only enough measurable and attainable objectives to accomplish the purpose of selling your proposal.
  - b. Include a generous list of objectives, even though you know that you may not totally achieve all of them.
  - c. Omit an objectives section; a problem statement is sufficient for defining your goals.
  - d. Your proposal has only one objective: to convince the reader that the benefit from your product or service will outweigh the cost.

ANS: A                      PAGE: 200

16. Which of the following is true concerning what the writer should do during the preparation of an effective proposal?
- a. Prepare the parts according to the standard accepted arrangement.
  - b. Start with the hardest part of the proposal and then go on to another.
  - c. Arrange the parts in whatever order seems appropriate.
  - d. Write the proposal by beginning on line one, page one, and proceed to the end.

ANS: C                      PAGE: 202

## SHORT ANSWER

1. What three purposes are served in a report by its preliminary parts? Give an example of a preliminary part that serves each purpose.

ANS:

Preliminary parts add formality, emphasize report content, and aid the reader in locating information in the report quickly and in understanding the report more easily. The title page of the report is a good example of the added formality purpose. The executive summary repeats the report's content in a summarized format and also helps in understanding the report more easily. The contents and figures pages aid the reader in locating information quickly.

PAGE: 183-186

2. List at least five suggestions for choosing a writing style that results in a more effective formal report?

ANS:

- Avoid first-person pronouns as a rule.
- Use active voice.
- Use tense consistently.
- Avoid placing two headings consecutively without intervening text.
- Use a variety of coherence techniques.
- Use tabulations and enumerations.
- Define terms carefully.
- Check for variety.

PAGE: 190-191