# Unit 6: Lecture

**Composing Visuals and Drafting your Final Business Report**

After reading Ch. 18 on report writing, get started preparing a draft of your report.  The textbook suggests three main steps:

1. Analyze the data and information
2. Organize your information
3. Draft the Report

**Analyze the Data and Information**

Before you select data and information for your report, you should carefully evaluate your data by

- **Identifying authors**: Who are they, what are their credentials, what are their motivations?
- **Assessing objectivity**: How well evidenced is the source? Are multiple views considered? Is the work professional and not overtly biased? Note: Don't mistake the principal of objectivity for lack of argument or point of view.
- **Assessing evidence**: What evidence is included/excluded, how is it analyzed? Does it appear complete? What assumptions are being made?
- **Checking currency:** How current is the data or source? Could its information or relevancy changed or diminished over time?

You can then choose the best data for your report, analyze numbers or patterns in your data, and finally check your logic.  All of these processes can help you choose the best or most persuasive data for your audience and purpose.

You may discover as you evaluate your data or even write your draft that you are missing some key bits of information, or that a source you thought might be useful turns out not to help you achieve the purpose you thought it would.  In this case, you should definitely circle back around to the research phase and see what other sources or data you can find.

**Organize Your Information**

Ch. 18 discusses common organizational patterns for different types of reports.  You may find the general pattern for problem-solution reports on pg. 585 particularly relevant to your final business report.

You textbook also offers these basic organizational strategies:

- Present information in the order that will be most persuasive for your readers
- When you have lots of information, group and chunk your information into 3-7 categories
- Work with (and create) your audience's expectations: for example, if you list ideas in a particular order in the overview, the audience expects you to present them in that order in the report.

Don't forget to use what you have learned about document design to help you chunk information; use headings, lists, white space and other visual organizers to help your reader navigate your document.

One good way to check for organization is to imagine a reader who wants a specific piece of information in your report: how quickly could they skim and navigate your document to find the information they are interested in?

Keep in mind that formal reports have some organization of parts already built in.  You can see in table 18.5 on pg. 597 what parts of the report are included in what order based on the level of formality.  Remember, your report assignment asks for a medium level of formality – the second column in the table – plus a references page.

**Draft Your Report**

First, review the sample report that starts on pg. 598.  Review the parts of a report and their functions, and review the formatting guidelines for each part of the document.  The sample report gives detailed advice about how to format headings, spacing, and other aspects of your document.  You will notice that this sample is slightly more formal than your report as it contains some pieces you will not produce (such as the letter of transmittal), but in all other aspects it is a good model to draw from as you compose your report.

You should notice in particular these things about the sample:

1. **Page Numbers:** Notice how they are formatted in formal reports. If you do not know how to paginate sections of a document differently, create a tidy self-paginating table of contents, or use a running head, now is a great time to learn some of the advanced formatting options in Word. Here are a couple of tutorials you may find helpful:

[How to Create a Table of Contents in Word](https://www.youtube.com/watch?v=Y5kFdH31k-g) **(https://www.youtube.com/watch?v=Y5kFdH31k-g)**

[How to Create a Running Head in Word](https://www.youtube.com/watch?v=Krwf3TDD1vU) **(https://www.youtube.com/watch?v=Krwf3TDD1vU)**

2. **Executive summary**: This part of the document is designed to be pulled off the report and passed up the chain, and thus needs to give a good enough overview that it is understandable even without the report attached. Notice also that the list of recommendations is identical to those on the Conclusions and Recommendations page.

3. **Figures:** All figures are labeled and titled and cite their sources. Figures are referred to in the text of the report.

4. **Recommendations**: Recommendations are specific actions you want your reader to carry out in light of the research and arguments you have presented to them. Recommendations are developed and argued for throughout the report.

Once you have pulled your data together, decided on a potential organizational pattern, and reviewed the sample report, you can begin drafting your report. Many people make the mistake of starting with the beginning of the report (the title page, executive summary, etc.) before writing the body material.

Instead, consider starting with the meat of the report. You will likely find that the preliminary pieces become much easier to write once you have fully worked out your arguments and recommendations in the body of the report (it is much easier to write a summary of a document that already exists than one you have yet to write).

You may discover as you draft that you may need to go back to rearrange your organizational choices or reevaluate some data: that's a normal part of research.

**Composing Effective Visuals:**

In the digital age, employees are increasingly expected to communicate effectively in both words and images.

Visuals can help you:

- Make important points stand out
- Emphasize material that might be lost in paragraph form
- Present complex material (for example dense numerical data) more compactly or clearly

According to Ch. 16 in your textbook, to use visuals effectively, you should:

1. Check the quality of the data
2. Determine the story you want to tell
3. Choose the right visualization for the story
4. Follow conventions for the type of visualizations you choose
5. Use color and decoration with restraint
6. Be accurate and ethical

Your textbook mentions a range of possible visualization types from tables and charts to photographs or diagrams, and gives more detailed guidelines for creating visualizations of each type. Each type of visualization has a specific purpose, a type of information or relationship it is designed to show especially well. To pick the right type of visual, you have to think critically about what possible visualization styles are available and what purpose those visualizations serve. The following website shows even more possibilities for visualization types (roll over each type for a pop-up example of each one):

[Periodic Table of Visualization Methods](http://www.visual-literacy.org/periodic_table/periodic_table.html) **(http://www.visual-literacy.org/periodic_table/periodic_table.html)**

You don't need to be a graphic designer to make visualizations, nor do you need fancy or expensive software. The operating system and office programs that you already use have simple tools you can use to make graphics. For example, Microsoft Word and Excel can make tables, charts, and graphs.

You can find tutorials on the web that show you how to use these functions in your particular edition of MS Office. For example, here is a

quick tutorial on how to insert charts in Word:

**Microsoft Word 2013 Tutorial: Inserting a Chart (https://www.youtube.com/watch?v=HgnSio6wYaY)**

For slightly fancier graphics, many free tools are available on the web for making infographics, such as

- **Canva (https://www.canva.com/)**
- **Venngage (https://venngage.com/)**
- **Piktochart (https://piktochart.com/)**

Each of these applications presents users with options for creating full infographics, as well as various types of data visualizations, such as charts, graphs, or maps.

Microsoft operating systems also come with a couple of tools you may find useful for simple tasks (you can find these in the start menu under programs/accessories)

- **The snipping tool** allows you to take full or partial screenshots (you may find this especially useful for your presentation in Unit 7).
- **Paint** allows you to make simple adjustments to images including cropping, resizing, rotating, adding text, highlighting parts of an image with circles or arrows, drawing simple figures, etc.

Reminder: When you compose your final business report, you need to include **at least one visual you composed yourself.** There are a wide range of possibilities for your visual from photos that you have taken, to organization charts you create in MS Paint, to charts and graphs created in Word, Excel, or an online infographic tool. Use your research to find compelling data that would benefit from visualization. Make sure to cite the **data source** under the image. For example: Data Source: Smith and Jones, 2004.

If you use additional images borrowed from elsewhere, you must clearly cite the **image source**, so your instructor can differentiate between images you composed and images you borrowed. For example: Image source: Johnson, 2004.