Analytical Report Assignment Guide

Background

An analytical report is a technical or professional document written for business or government uses. These reports use information from surveys, financial records, and other reliable sources to reach conclusions that help reviewers make important decisions. It is different from an *informational* report because **it analyzes a situation and persuasively presents conclusions and recommendations**. This type of report is covered in Ch. 10 of your textbook. A sample report can be found on **pages 281-294** – but it is just an example – your report will look different. Sample student reports from previous semesters will be provided.

Goals of analytical reports

Depending on the purpose, an analytical report can accomplish different goals. Once you have chosen a **context** and **topic**, you will need to establish which type of goal you are after. Below are three main types; your analytical report will only take on **one** type of goal:

To Assess Opportunities

This kind of analytical report **informs decision makers about a new and potentially successful endeavor**. For example, you could suggest that a retail snacks company consider a gluten-free version to its most popular cookie line. In the report, you would include information on food industry trends and examples of other companies in similar markets.

Examples: *market analysis reports, due diligence reports*

To Solve Problems

Simply put, this type of report **analyzes and solves problems**, or attempts to. Using previous examples of similar situations and weighing the options between solutions, you should make clear recommendations to a decision-maker based on the research compiled. For example, a business is facing higher costs due to recent upgrades and is seeking ways to reduce spending while maintaining sales. What solutions and/or plan of action could be proposed?

Examples: *troubleshooting reports, failure analysis reports*

To Support Decisions

If an organization or business is making a big move in the near future, this type of report **analyzes the effects (both positive and negative) the decision would have on the organization**. If done retrospectively – as in, the move has already been made and there have been repercussions, good or bad – then you may use the available data to analyze the move.

Examples: *feasibility reports, justification reports*

Report topic examples:

- To analyze the benefits of adopting a new employee dress code at X company

- To introduce an alternative approach to a current problem or issue

- To justify a current change in workplace policy

Considerations when choosing your topic:

- Choose a context you are familiar with (i.e., a company you've worked for, a business you have stock in, an organization you either follow or are a part of)
- Choose a realistic topic – don't attempt to make something up that is either un-relatable or too extreme (**although the topic can be hypothetical**)

Overview of assignment

- Analytical Report (approx. 2000 words), with initial **Work Plan** (approx. 500 words **– work plan guidelines included separately**)
- **APA** format for **in-text citations** and **separate "References" page**
- **Minimum** of **five references** from reputable business sources. All references must be cited in report
- Resources can include surveys and/or interviews (**primary research – optional**), in addition to secondary research
- Typed; single-spaced, with headers/sub-headers (see samples in textbook + student samples)
- Include **visuals** (e.g. graphs, pictures, charts) where necessary (**at least one**)

General Outline

1. Executive Summary -- In a realistic business environment, upper management of a company may not have time to read an entire report. This section is about <u>one page long</u> and summarizes the key points of the report, **including** *conclusions* and *recommendations*. Use short, clear paragraphs with headings to preface and summarize the entire report.

2. Introduction

    a. Purpose -- The introduction of an analytical report begins with a **statement of purpose**, which sets up and explains what will be covered in the report and why. It should begin with "To…"

    b. Background -- This section reviews the historical conditions or factors leading up to the report.

    c. Sources and Methods -- This section describes primary and secondary sources and methods used to gather information and supporting evidence for the report.

    d. Scope -- The scope section describes how much of the chosen topic will be covered and what the analysis will focus on.

    e. Limitations -- This section (**if relevant**) states the areas related to the topic that will NOT be covered. Provide reasons for why these areas are not included (budget, time, resources, etc.), but also comment on why not including them still makes the results valid.

    f. Report Organization -- This section briefly prefaces how the following report is organized. This gives a quick overview so the reader will know what to expect.

3. Body -- The main content of the report is presented in short, topical paragraphs. Relevant and informative **headings** are used to help the reader navigate from one topic to another. This is useful for busy business people who may need to refer to one particular section of your report during a meeting or presentation. All data reported is analyzed within the body of the paper. Include **visual images** (graphs, charts, pictures) where visuals would be more effective than simple text.

4. Conclusions -- Based on a logical evaluation of the evidence provided in the report, clearly state conclusions that are sound and justified. You need to interpret the findings of your research for the trends, patterns, and possibilities that they indicate. Give the **reasons** you arrived at these conclusions, based on the information you've stated in the body. In this section, give the answer, solution, or concluding argument(s) to your statement of purpose.

5. Recommendations -- Propose a recommended plan of action for your audience. Recommendations answer the question "what should follow after reviewing the report?" assuming that the report is successful and the reader is convinced of the argument made and the conclusions drawn.

- Establish the need for action by re-mentioning the problem or opportunity.
- List the steps (recommendations) required to achieve the benefit, using active verbs for emphasis.
- Summarize the benefit(s) that can be achieved if the recommendation is adopted along with any potential risks, costs, or necessary procedure changes.
- Summarize your recommendations and action desired of recipient(s).

6. References -- APA format for references that are cited throughout the report (in-text) and on a separate page titled "References". **A minimum of five references** from reliable sources is required.

Tips for writing your analytical report:

√ The key term is ANALYZE.

√ You may choose a non-profit, educational, or private company for this report. However, there are advantages to choosing a public company:

- Public companies are required by law to publish financial data; therefore, you will be able to access this kind of information for your report.
- Public companies tend to be ones the media pays more attention to, so there might be more articles available on them.

√ Use simple, clear language. Maintain a formal tone. Be concise (pages 114-115 in B&T).

√ Analyze the situation, do the research, and then write to your audience.

- Imagine that your professor is NOT your primary audience.

√ Use reputable business sources in your report.