

Checklist for Writing Management Reports

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These guidelines refer to a management report written to gain acceptance for a recommended course of action. As you can see, it is no simple matter to write an effective report. The checklist includes over 60 items (over seventy if you count the bullet points under general guidelines). If your report is important, I suggest that you go through the checklist in a systematic way.

I was going to put an asterisk beside each guideline that was typically violated in management reports. I gave up as most of the items would have an asterisk.

The importance weights for items would vary depending on the situation. As a result, it only makes sense to average across items if you want to assess the improvement when revising a given report. I do not advise using this checklist for making comparisons among reports written by different people.

Finally, we will never be able to get everything into guidelines. Some people have the creativity and flair for writing, and that is not captured by guidelines.

These guidelines are provided under the assumption that you have strong arguments to support your recommendations. If not, most can be ignored or reversed, because you would then want to make your report obscure – don't let them know that you have nothing important to say. For more on this, see my Dr. Fox extension (under Full-Text Papers at www.jscottarmstrong.com – see "Unintelligible Management Research and Academic Prestige," 1980).

Suggestions in this checklist were drawn from my forthcoming book, *Advertising and the Science of Persuasion* and from Ehrenberg (1981). Some advice is based on received wisdom.

	Rating -2 to +2 NA=not applicable	Comments
<hr/> Target Market		
1. Be sure you understand who you are writing for and what their expectations are. The most effective way to do this is to ask someone to adopt the role of the target market and provide comments.	_____	
2. Add a cover letter if needed for the intended audience.	_____	
Source		
3. Identify who wrote the report, when they wrote it, and how to contact them.	_____	
4. Establish your capabilities, if not done previously. (If done previously, or if weak, mention them later in the report.)	_____	
Reader Guides		
5. Executive Summary. Include one page of recommendations that tells what to do and why. <i>Assume that the client will only read the first page.</i>	_____	
6. Provide an introduction on how the report is organized.	_____	
7. Provide roadmaps (scannable text)		
• Table of contents	_____	
• Subtitles	_____	

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8. Use bullet points for 3 or more items in a list.	_____	
Recommendations		
9. Make the recommendations operational. For example, "Raise the price by ten percent."	_____	
10. Build the report around the recommendations.	_____	
Arguments		
11. Sell benefits. For example, "You will earn \$185,000."	_____	
12. Use a two-sided argument. <ul style="list-style-type: none"> • State risks (e.g., use confidence intervals) • Admit limitations and explain how they can be handled 	_____ _____	
13. Show the process used to reach your recommendations. Structure the process.	_____	
14. Provide enough detail on data and methods (in an appendix or on a website) to allow for replication.	_____	
15. Show that you examined alternatives.	_____	
16. Provide sources (e.g., Smith 1995) in the text and provide access to full text in the references.	_____	
17. Use objective support (Do not say "I think," "I believe," "We are confident," etc.) <ul style="list-style-type: none"> • Present data (even small samples) • Use independent 3rd party support • Show results from prior research studies 	_____ _____ _____	
18. Avoid weak arguments: They drag down strong arguments.	_____	
19. Use the "soft-sell" for important and sensitive issues. <ul style="list-style-type: none"> • Lead the audience to conclusions. • Avoid direct conclusions in the report if possible. Besides, you already gave your conclusions in the executive summary. 	_____ _____	
20. Illustrate. Showing is more convincing than merely telling, so use relevant examples. Provide interesting facts, vivid details, or stories to illustrate your points.	_____	
21. Support statistical findings with examples.	_____	
22. Use tests of statistical significance only if the null hypothesis is reasonable.	_____	

Rating
-2 to +2
NA=not applicable

Comments

Exhibits

23. Organize data so that the conclusion is obvious:
- Put figures to be compared into columns, not rows _____
 - Round to three significant digits _____
 - Show column averages (and row averages, if relevant) _____
 - Order rows by size or the key variable _____
 - Use layout to guide the eye (do not use vertical lines) _____
 - Highlight data to reinforce conclusions (e.g., boldface key numbers) _____
 - Do not put computer outputs in the report (seldom are they tailored to your audience) _____
24. Minimize the “ink” used in exhibits. _____
25. Provide descriptive titles for an exhibit if the conclusion is not obvious. _____
26. Use line and bar graphs to show changes (not pie charts, which are relevant only for showing proportions). _____

Style

27. Use prose. Bullet points are not sufficient for written reports. (But you can use them in checklists.) _____
28. Avoid negatives.
- Do not attack _____
 - Do not use negative words _____
 - Do not apologize _____
29. Write forceful reports.
- Use active rather than passive voice – unless passive is clearer _____
 - Use words with concrete meaning _____
30. Do not speculate unless you are proposing further research. _____
31. KISS (Keep it short and simple):
- Simple words _____
 - Common words _____
 - Short sentences _____
 - One idea per sentence _____
 - Eliminate unnecessary words _____
 - No more than three prepositional phrases per sentence _____
 - No more than three numbers (or percentages) per sentence _____
 - Avoid jargon _____
 - Avoid acronyms _____
32. Avoid cross-references (going elsewhere to see important results is distracting, so do not put important tables at the end of a report). _____

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Format		
33. Put all important information in the report itself (not in an appendix).	_____	
34. Use common typeface for text: <ul style="list-style-type: none"> • Use a serif typeface for text (san serif type is okay for headings) • Black on white (do not write on shading; do not use colors). Yes, it may be boring, but it improves comprehension • Do not use all caps • Avoid bold that extends more than one line 	 _____ _____ _____	
35. Use full justification when possible.	_____	
36. Use white space to emphasize what follows.	_____	
37. Do not number the sections unless you absolutely need them to help people find things.	_____	
38. Do not use footnotes.	_____	
39. Consider providing an electronic copy of the report – especially when the report can hyperlink to sources.	_____	
Rewrite		
40. Rewrite until it is clear and interesting. The first draft never works.	_____	
41. Proofread to eliminate obvious errors. Even better, ask someone else to proofread. Readers may think small errors are due to a lack of care and generalize about your analysis.	_____	

References

Armstrong, J. Scott (2006), *Persuasive Advertising*. Forthcoming, Palgrave Macmillan

Ehrenberg, A. S. C. (1981), "The Problem of Numeracy," *American Statistician*, 35 (2), 67-70.