

A REPORT.....

1. Why write a report?

Many roles involve reporting, whether it's for your management team requesting a report on:

- Customer satisfaction levels ;
- Or for sales teams seeking insights on new customers;
- Or for the boss who regularly expects a comprehensive overview of your team's progress and performance.

2. What is a report?

A report is a structured document that presents the findings of a survey, project, or implemented measure. It can also serve as an in-depth analysis of a specific issue or dataset. The primary purpose of a report is to inform by presenting facts, conclusions, and, where applicable, recommendations or strategic options that can guide the company's decision-making.

3. What are the key elements of a report?

1. A comprehensive summary of the activities performed;
2. Evaluation of the activity's impact;
3. Assessment of relevant facts and data;
4. Conclusions and forecasts regarding the potential impacts of the activity;
5. Suggestions for enhancements or proposed next steps.

4. What are the steps in writing a report?

1. Define the objective of the report;
2. Identify the intended audience and how they will utilize the report;
3. Conduct thorough research and identify credible and relevant sources;
4. Create a structured outline for the report;
5. Examine and present the data in a clear and organized manner;
6. Summarize the key findings and draw conclusions based on the analysis;
7. Propose actionable recommendations based on the findings and conclusions.

4.1. Determine the purpose of the report

1. The subject of the report;
2. The need to which this report responds;
3. The target audience of the report;
4. The purpose of the report.

4.2. Identify the recipients and their use of the report

The sales report should be data-driven and objective, relying on actual sales figures. It should highlight the strengths and weaknesses of individual points of sale, provide year-over-year comparisons of various product performances, and, if applicable, assess the performance of each salesperson. This detailed analysis will allow sales management to make informed decisions and implement effective strategies.

4.3. Conduct research and identify relevant sources

To write a report, it is essential to gather data that is directly relevant to your topic. In some cases, this data may be readily available through your specific activities or fieldwork. For example, a sales assistant who tracks the performance of a sales team on a daily basis could leverage this data to generate a monthly sales report, breaking down results by region and individual salesperson.

4.4. Prepare the outline of the report

1. Title of the report;
2. Summary;
3. Presentation;
4. Summary of the procedure;
5. Data analysis;
6. Conclusions;
7. References or bibliography.

4.5. Analyze and present data

A report is often either comparative, analyzing results from year N versus year N-1, or explanatory, providing insights into factors such as a decline in sales or the impact of a new hiring policy.

4.6. Present the conclusions

After presenting all the data, the next step is to draw conclusions based on the findings.

4.7. Recommend measures

Depending on the report's objective, you may be required to offer recommendations to address the identified issue or improve the situation.