



Worksheet for Preparing Recommendation / Feasibility Reports

Taken from Daniel Riordan, *Technical Report Writing Today*



In Nutshell

- Formal format presents documents in way that makes them more official.
- Often used with longer documents.
- Used also in documents that establish policy, make proposals, or present results of research



Analyze the Audience

- Who will receive report?
- Who will authorize recommendations in this report?
- How much do they know about topic?
- What is your purpose?
- How will report be used?
- What will make you credible in their estimation?






Figure out THE LOOK

- Plan visual aids that will convey report's basic info.
- Integrate them properly into the text (see "Integrated Graphics" PPT/handout)
- Prepare style sheet for up to four levels of heads and for margins, page numbers, and captions to visual aids.
- Decide whether each section should start at the top of a new page.




The Look, cont'd

- Create title page
- Prepare table of contents
- Prepare list of illustrations
- Present figures first, then tables




Organizing Findings

- Determine order of statements (purpose, scope, procedure, etc.) in the introduction
- Prepare glossary if necessary
- List conclusions
- List recommendations
- Explain rationale
- Write summary
- Prepare appendices




Criteria

- Ask technical, management, financial questions
- For each criterion, provide a name, the means of evaluation, and a rank
- Explain methods of research
- **Note: Criteria are standard for Business Plans**



Prepare background for report

- Who requested?
- Name purpose
- Name method of investigation
- Name scope
- Explain the problem
- What is the basic opposition (such as need for profit versus declining sales)
- What are the causes or effects of the facts in the problem



Style sheet

- Margins
- Headings
- Page numbers
- Visual aids
- Captions
- Fonts
- Key: consistency

Worksheet for evaluating your report

Evaluate introduction

- Does it provide gist of report?
- Does it give you context (situation, criteria, reason for writing) of the report?
- Do you know the recommendation after reading the first page?

Evaluate the Criteria

- Appropriate?
- Complete list?
- Can you find a “statement of the standard” for each one?
- Can you evaluate the data on the statement of standard?
- Do you understand the ranking of each criterion?



Evaluate Discussion

- Is the standard given so you can evaluate?
- Are there enough data so you can evaluate
- Do you agree with the evaluation?
- Do you understand where the data came from?




Evaluate Visual Aids

- Do visuals appear in spots where they help communicate the point? Are visuals clearly titled, numbered?
- Is visual on the same page as the text that describes it?
- Does the text tell you what you need to see in the visual?




Querying a Peer's report

- Why did you include each sentence in the introduction?
- Why did you choose each criterion?
- Why did you write the first sentence you wrote in each criterion section?
- What one point have you made with the visual aid?
- Why did you construct it the way you did?




Querying a Peer's report (cont'd.)

- Would you submit this to a client for money?
- If not: What would you do differently?
- Are you happy with the level of writing?
- Could you use this document as proof you deserve a promotion?



Editing slice by slice

- One sentence test (section by section)
- Numbers
- Citations
- Spelling and usage
- Graphics
- Purpose
- Reasoning



Editing slice by slice (cont'd.)

- Organization / flow
- Style
- Consistency
- Questions for other reader:
 - *Clear?*
 - *Complete?*
 - *Convincing?*
