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This document has been researched and prepared by PETER KERNTKE Director of Australian Risk Management Solutions (AUSRISK) [www.ausrisk.com.au](http://www.ausrisk.com.au) as tool to assist in the preparation of reports.

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## **REPORT LAYOUT**

The information in your report may be vitally important; your choice of words may have been faultless; your analysis just as brilliant; but the effort will all have been wasted.....if people skim through it or put it aside because it looks uninteresting.

But if your report looks easy to read and understand, the battle (to get people interested) is half won, even before they start to read it. That is why visually attractive "setting out" is probably the single most important factor in the writing of all reports.

If you can create just one page that looks interesting then you can just as easily create a report with visual appeal from beginning to end. But how well you succeed depends on how well you can use the visual layout techniques explained in this book, rather than your writing skills or your ability with English.

All the techniques are easy to follow, simple to use and can be learnt in a few hours. To show you how well they work, they have been used in this book to create visually attractive pages.

### **PARAGRAPHS ARE THE FIRST STEP**

The first thing you need to do to create interesting looking pages, is to divide your ideas up into short paragraphs with at least one blank line between each paragraph.

Start a new paragraph every time you start a new thought or idea. This immediately improves the visual appearance of your report and makes the material easier to read. (Notice that this is exactly what is being done right here.)

Readers find it hard to follow the way you are thinking if several of your ideas are all mixed up together, in on paragraph. But when you keep them apart it provides them with a much clearer idea of the way you as the writer are thinking things out in your mind.

### **GROUP SIMILAR IDEAS TOGETHER**

To maintain this logical flow of ideas make sure that similar ideas are grouped together, even when they are in separate paragraphs. Compare this page with one from a typical business report. Which layout is more likely to gain (and hold) the readers' interest?

### **THEN PUT THEM IN A "WHITE BOX"**

Moving a bundle of loose items is easier if you pack them together in a box, and it certainly makes unpacking a lot simpler. Imagine that a group of your ideas (bits of information) are collected together, for transport to another location. In this case, the new address is your reader's mind. Using boxes works as well with a bundle of ideas, as it does with a bundle of files or invoices. The box is the area of white space that surrounds the group of words. In fact writers often refer to it as a "white box".

### **REMEMBER TO LABEL THE BOX AS WELL**

The advantage of putting things in boxes is lost if there is no label to tell readers what is inside. Labeling boxes is just as important in report writing. Each group of ideas should be clearly identified by its own individual heading or sub-heading, as is done on this page, using

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a combination of headings and sub-headings, as is done on this page, using a combination of headings and sub-headings. This helps the reader to follow the logic of your presentation.

Your heading; the 'label' on the lid of the "white box", makes it easier for anyone looking through the report to find exactly what they are looking for.

Apart from the title, the most important headings in a report are:

INTRODUCTION  
EXECUTIVE SUMMARY (or RESULTS)  
ANALYSIS (or DISCUSSION)  
RECOMMENDATIONS

These four headings are essential. In a longer report there would of course, be many more, there should never be less, even in a one page report, because each one of them refers to a different aspect of the report. If any one of the four is left out then perhaps the document is not really a report at all, in which case fewer headings may be needed.

## HIGHLIGHT MAIN HEADINGS

Major headings (those numbered 1.; 2.; 3. and so on) and important sub-headings (those numbered 1.1; 1.2; 2.5 and so on) should all be highlighted to help them stand out from minor ones, (Those numbered 1.3.1; 2.5.2; 3.2.4; etc) emphasize the title and the four main section headings by printing them in CAPITALS like the headlines in a newspaper.

## NUMBERING IS ESSENTIAL

Numbered paragraphs help readers to locate sections or topics referred to in other parts of the report. This is particularly useful when items are being discussed in a meeting.

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In most reports, the numbering is linked to the headings, and this increases readability even more. So to help maintain a clear numbering system, match your numbering with the major sections in the report. Start by allocating a prime number to each of the four main section headings:

- [1].....FIRST, **INTRODUCTION**
- [2].....SECOND, **EXECUTIVE SUMMARY (or RESULTS)**
- [3].....THIRD, **ANALYSIS (or DISCUSSION)**
- [4].....FOURTH, **RECOMMENDATIONS**

Perhaps an even more important reason for using a numbering system is the way in which it leaves readers with a positive attitude towards the writer and the topic. If your numbering is logical and businesslike, then **the whole report** will also look logical and will appeal to the reader who appreciates a well-organized presentation.

## METRIC NUMBERING

The international standard for numbering is the metric method, back on numbers alone, separated by decimal points. Alphabetic numbering, particularly a mixture of capital and lower case letters (and, or Roman numerals) can only help to confuse your reader.

Here is a good example of the use of metric numbering in a report.

## REPORT ON THE USE OF NUMBERING SYSTEMS IN BUSINESS REPORTS

1. INTRODUCTION
  - 1.1 Aim  
This report examines the advantages of a numbering system in a modern business report
  - 1.2 Sources of Information  
References for this report have been taken from "The Metric Conversion Kit" ISO 1999.
2. EXECUTIVE SUMMARY
  - 2.1 The Metric Numbering System  
The international standard for technical and business reports is the "metric number system, based on a series of numbers separated by decimal point
  - 2.2 Advantages of the Metric System  
Metric numbering is more logical, and paragraphs are easier to refer to, in contract to the alphabetical system, which is complicated to use except in very short reports.
  - 2.3 Disadvantages of Other Systems  
Other types of numbering, particularly a mixture of capital and lower case letters or Roman numerals, can confuse the reader, and lead to the following difficulties:
    - 2.3.1. Loss of continuity of ideas
    - 2.3.2. Confusion for the writer
    - 2.3.3. Difficulty in editing
    - 2.3.4. Reduction in logical flow of ideas

## LISTING OF IMPORTANT POINTS

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Although information that is similar should be presented together, a string of important items should NEVER be written in a single sentence. Instead, list them one under the other, or in a series of columns. Numbering each item is usually not necessary as long as the paragraph or heading at the start is numbered.

Table like this are useful when presenting information such as:

- A series of tasks
- Lists of places or locations
- A list of names

Listing improves the appearance of the page. It also helps to maintain a logical flow of ideas for the reader.

## ADDITIONAL USE OF "WHITE SPACE"

Open areas, free of words and illustrations, are called "white space". Used with care, white space can greatly enhance the appearance of a business report.

The first way to make use of "white space" is by creating white boxes, as described above. Allowing extra blank lines before and after headlines; and in-between some paragraphs can extend this. Notice the way this has been done in this book and how it improves the visual appeal and readability of the pages.

Another useful way of employing this technique is called 'indenting'. (See example below).

## INDENTING – AND THE "UPSIDE DOWN PYRAMID"

Widening the margin on the left and shortening the right hand end of the same line will produce wider margins on both sides of the page. The result is a gradual narrowing, referred to as an "upside-down pyramid". This is another way of using "white space" in a report. Newspapers have always used this technique to make their 'reports' more attractive.

In the case of a business report, the indenting system should follow a logical plan and it should be consistent throughout the report. For a start, (as has been done here) the initial paragraphs directly under a major heading should be written full-width.

### Indenting Items under a Sub-Heading

The most common indenting technique is to increase the width of the left margin so that the printed words are all "indented" to the right, as has been done in this paragraph. This is visually attractive and helps readers by indicating that although this is a new paragraph, it is not a completely new idea. This paragraph, for example, refers to the main idea under the heading "THE UPSIDE DOWN PYRAMID – INDENTING" but it is a sub-item, and is of less importance than the previous paragraph. Notice that the Sub-heading was indented as well.

### Indent more for less important headings

Any paragraph directly under a minor heading should be indented a further 5 – 10 mm (3 or 4 letter spaces) to the right. But be careful not to make the margins too wide. Anything over half an inch (12mm) for each step of the indent is not as effective as a smaller indent.



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Indenting, the use of white boxes, and 'upside-down pyramids' all help create geometric patterns, as the dark type and surrounding 'white space' combine to create a steps-and-stairs effect. (See Figure 1).

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## OTHER REQUIREMENTS FOR A SOUND REPORT

### LOGIC AND CREDIBILITY

Apart from visual appeal and clarity in setting out (the most important feature); your findings must also show two other qualities:

- Regardless of what kind of information is being presented, it must appear in a LOGICAL order.
- Factual information must be presented in a way that makes it sound absolutely believable; so that the reader will have no difficulty in agreeing with it. (The quality of credibility).

This section explains how these two essential features can be developed, using simple report writing techniques.

### CREATING A SENSE OF LOGIC AND A CONTINUITY OF IDEAS

#### 1. START WITH A CLEAR TITLE

Use the words in the title to indicate exactly what the report is really about, or what it aims to achieve. Include the name of the group, firm or organization that will use the report and the year the report refers to.

"REPORT ON" or "INVESTIGATION INTO" (Choose one) "RECENT"; "CURRENT" or "PROPOSED"	...Starts the title of. Past? Present? Future?
(Example A) "OH&S AUDIT"	...Main Topic
(Example B) "CHANGES IN OH&S SYSTEM"	...Main Topic
(Example C) "MANUAL HANDLING INJURIES"	...Main Topic
"AND RESULTING CHANGES IN POLICY"	...Sub-topic; if needed for clarity.
(Example A) "TRAINING DEPARTMENT"	...Tells who for
(Example B) "BRISBANE OFFICE"	...or where
(Example C) "CONSULTING SECTION"	...or which section
"AUSTRALIAN RISK MANAGEMENT SOLUTIONS."	...Business or organization name
"AUSRISK"	...or official title
"PADDINGTON"; "BRISBANE"; "QUEENSLAND"	...actual location
"2003"; "DECEMBER - 2005"	...general time frame

2. USE ONE SECTION FOR THE REPORT FOR EACH KIND OF MATERIAL OR DIFFERENT KINDS OF DATA.

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You already know the advantages of dividing your report up into sections, as far as readability is concerned. This works well as far as logic is concerned.

There must always be at least the standard sections, (numbered 1 to 4) but quite often there are more.