Effective Report Writing

Gaurav Mishra

CA, M.Com, B.Com, ACCA (P)

+91-7349490825 || 8108763725

90gmishra@gmail.com

Objective of this Session

- Importance of effective report writing

- Building an understanding on different type of reports, which CA's deal in

- Designing of reports

- Do's and Don'ts in report writing

- Communicating the report

- Key functions in power point enabling report writing

What You think?

1. Where do you score yourself in report writing?

   1. (1)   (2)   (3)   (4)   (5)

2. What are your perception's about who are better in presentation?

   (A) CA   (B) MBA

3. Does it have any monetary impact?

   (A) Yes   (B) No   (C) Not so much

4. Way of presenting is really important?

   (A) Yes   (B) No

5. Which is the effective way of presentation?

   (A) E mail   (B) Courier   (C) Projector   (D) As per stakeholder needs

Importance of effective report writing

1. Why report writing is of such vital importance?

    - Effective communication

    - Sharing of information to concerned stakeholders

2. What is a good report?

    - Catering to the requirements of recipient of report

    - Technical and functional information

    - Aesthetic

    - Story line and logical sequence

    - Volume of information

Understanding on different type of reports

Different types of report CA needs to prepare depends upon the activity he is dealt in now a days

Practice/Consultancy Profession	Industry
Statutory audit	Accounts Function
Tax Audit	Treasury Function
Risk Consulting	Chief Finance Officer
Forensic Auditor	Investor Management
Investigation	Management assurance service
System Audit	Advisor to Management
Management Consultancy	

Note:
- There are various platforms (MS word, Excel, Power Point, Power BI) to present reports to management.
- As on date Majority reports is being presented on power point as it gels the aesthetics with clear and concise reporting along-with serving the purpose of management.

Designing of Reports

- Make clear purpose and objective
    - Setting the context
- Have a clarity on stakeholders expectation
    - Reader Orientation
    - Complete & Self explanatory
- Abide the Compliance requirements / standards, if any.
- Functional and technical information should be accurately captured and based on factual information
    - Reliable documents
    - Logical Sequencing
    - Support & factual
    - Comparability
    - Upto date
- Concise
- Choice of language
- Positivity
- Unbiased and non judgmental recommendations
- Proof Read

Consequence, if report not prepared well:
- Stakeholder requirement does not meet
- Rework on report
- Loss of time
- Increase in cost
- Not serving the suitable purpose

New Survey: 70% Say Presentation Skills Are Critical For Career Success

Carmine Gallo Senior Contributor ©
Leadership Strategy
*I write about leadership communication to grow sales and build brands.*

TWEET THIS

For example, 20% of respondents said they would do almost anything to avoid giving a presentation including pretending to be sick or asking a colleague to give the presentation

In the information age you are only as valuable as the ideas you have to share.

Seventy percent of employed Americans who give presentations agree that presentation skills are critical to their success at work, according to a new Prezi survey. My first reaction? The other 30% don't know it yet.

Prezi, the cloud-based presentation platform company, collaborated with Harris to survey employed professionals about their attitudes on presentations. Prezi also asked me to review the survey results. The findings reflect just how important presentations skills are to one's career, and also reveal the extreme measures people take to get out of giving a presentation. For example, 20% of respondents said they would do almost anything to avoid giving a presentation including pretending to be sick or asking a colleague to give the presentation , even if it means "losing respect" in the workplace.

"Survey" a bitter truth for presentation skill

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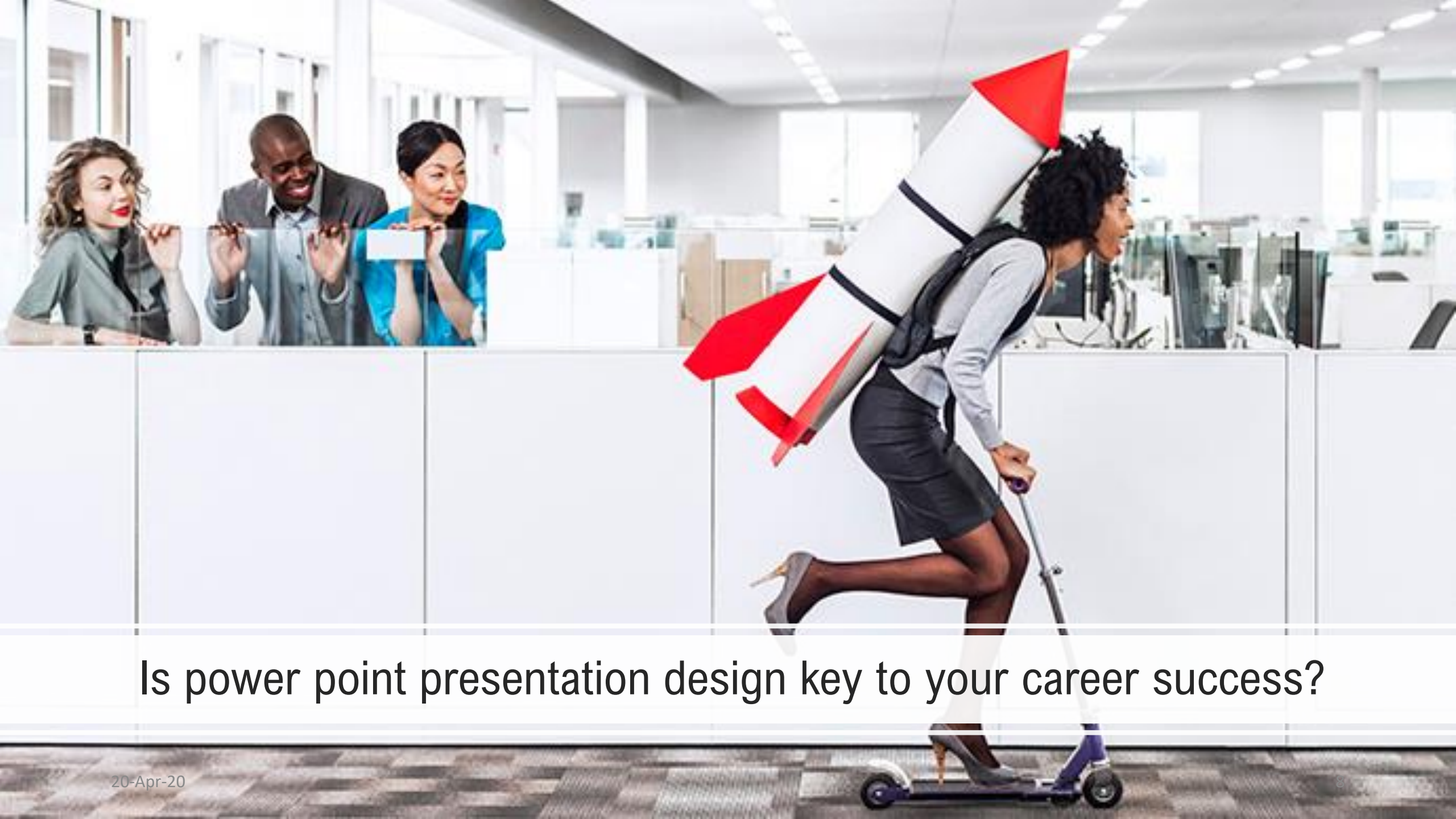
Is power point presentation design key to your career success?

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Billionaire entrepreneur Richard Branson calls excellent communication an 'art', and says that it's the most important skill any leader can possess.

Branson isn't the only one who thinks so. In the business world, it's common knowledge that if you don't communicate well, you won't get ahead. Effective presentation skills, including great PowerPoint presentation design, is an essential part of communicating well.

Analysis of more than 100,000 presentations by a team of data scientists proves this theory as it shows that it's not only what an audience hears that's important; what they see is equally so.

"We learn by example and by direct experience because there are real limits to the adequacy of verbal instruction," according to Malcolm Gladwell, author of *Blink, The Power of Thinking Without Thinking.*

In *Blink*, Gladwell illustrates how our unconscious is judging all the time. You know this instinctively which is why you'd never show up to a job interview in your pajamas. You break out your best suit because what you see is what you get. Your best suit gives your audience the instant visual message: "I've got this."

The same goes for your PowerPoint presentation design. As Gladwell suggests, if you've only got a split second before someone is making a lasting judgment of you, bad templates and endless bullet points aren't going to win you that big promotion or new client.

Your PowerPoint presentation design visuals are integral to the success of your presentation. They should support what you're saying, not be what you are saying. Think of it this way: you want them to work as a guide rather than as a crutch. To achieve this, they need to be a compelling visual display of your ideas.

Your presentation is your chance to guide people to action. You are saying, "I'm the perfect fit for the new position you're creating." Your audience is looking to you for this guidance. If you come across as unsure, they will be too. It's why you need to give them the sense that you are someone who should be followed; that what you are communicating is right and true.

Whether or not a presenter is confident reflects an audience's opinion of their "accuracy, competence and knowledge level," according to research by Caroline Wesson at the University of Wolverhampton, Institute of Psychology, in the UK. "The more confidently expressed that information is, the more likely it is to be followed."

Exuding confidence is key to giving your audience the feeling that you know what you are talking about and that you are the expert. And nothing gives a presenter more confidence than standing in front of a visual representation of their ideas that makes the audience nod their heads in agreement as they listen.

Source: https://eslide.com/why-powerpoint-presentation-design-is-key-to-your-career-success/

Why Power Point for reports?
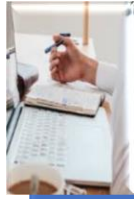
Benefits of Presentation

First Impression (AIDA Model)

Engage Audience

Makes One More expressive

User Friendly

Breaks the barrier of boredom

Consistency

Increase ability to Influence

Wide range of File Integration

Flexibility

Saves Times

Steps to create effective reports

Focus on objective	Do research and plan accordingly	Give a brief overview at start	Time your presentation
Use Slide Master feature to create a consistent template	Use Simple background	Simplify and limit the number of words on each screen	Limit punctuation and avoid putting capital letters
Use good quality image/ relevant visuals	Limit the number of slides	Pay attention to design, templates	Limit number of graphical image on each slides
Limit number of colors in each slides	Have bullet points	Avoid transition and sound effects	Avoid dancing slides

Do's while report writing

- Adherence to specific / standard format, if any.
- Setting the context - should be well defined
- Define a story line and logical sequencing
- Add Glossary for abbreviations
- Organize reports into sections
- Header should speak out from the content
- Use formal language (more formal vocabulary)
- Be non-personal
- Use full verb form instead (Is not rather than Isn't, can't, they're etc.)
- Be Clear and concise
- Proof-read the documents
- Segregation of information into views opinions, recommendations and factual statement etc.
- Consistency
- Information should be with sufficient supporting's and backups
- While making assumptions mention disclosure and basis of
- Effective Closure section
- Always mention source of information when quoting facts/figures referred from any external sources

Don'ts while report writing

- Avoid negative words to the extent possible
- Use of inappropriate language
- Careless while writing recipient name and other details
- Use Wessel Word's / emotional words (e.g. it seems that, there appears to be etc.)
- Avoid blame game
- Volume of information (not too excess or not too short)
- Length of the reports (not too lengthy / not too short)
- Utilize the same adjective or verb repeatedly
- Avoid unnecessary technical jargon
- Questions to the extent possible
- Use words for numbers i.e. do not mix words and numbers
- Leave out controversial phrases (Use appropriate connectors and introductory phrases.)
- Spellings error and grammatical errors
- Formatting
- Use active voice

Content of report writing

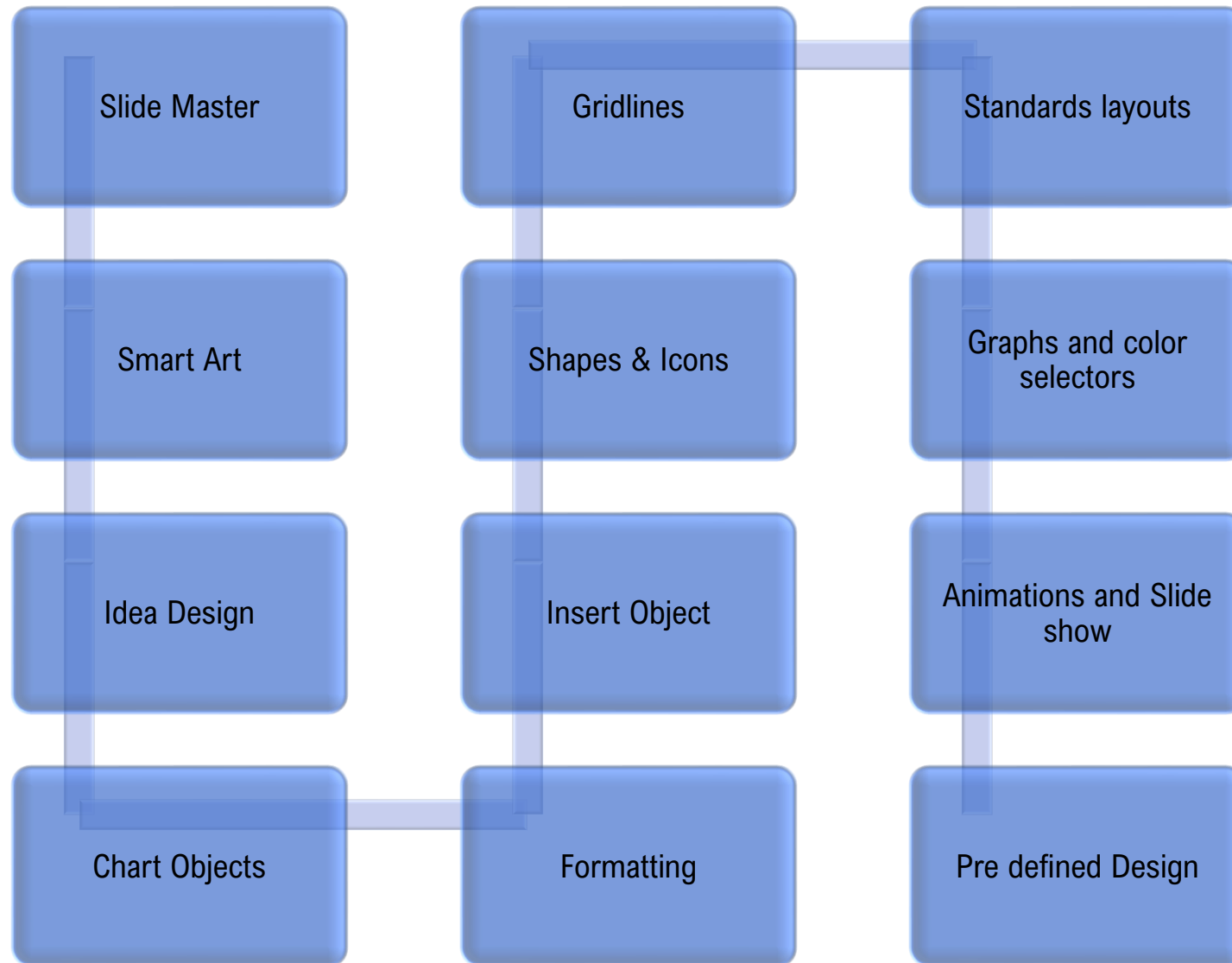| Parts of the Report	Content	Function	Language Features
Title Page	Name of the report, date	To inform	Factual
Table of Content	What you find in your report	To inform	Factual
Executive Summary	A summary of the report	To inform	Factual
Introduction	Background, problem, approach, definition of special words used	To inform	Factual
Methods	Methods or procedures which lead to the findings	To inform	Factual
Findings	Results of investigation, research, and calculation	To inform	Factual
Conclusion	Conclusions drawn from the Findings	To Convince	It is probable that
Recommendations	Things that should be done as a result	To persuade reason	Use of We

Communicating the report

- Identify your stakeholders (to whom)

- Identify stakeholder expectation (why)

- Identify how the message will be communicated (the stakeholder's preferred method)

- Identify communication necessary to satisfy stakeholder expectations and keep them informed (what)

- Identify and finalize how the report will be communicated (this should be finalized at design stage itself)

- Identify time frame / frequency for communication

- Adherence to Time frame i.e. avoid last minute rush

Following should be considered while communicating the reports**:**

- Be concise and clear

- Document items templates, formats and others back ups.

Key functions in power point enabling in report writing

Slide Master	Gridlines	Standards layouts
Smart Art	Shapes & Icons	Graphs and color selectors
Idea Design	Insert Object	Animations and Slide show
Chart Objects	Formatting	Pre defined Design

1. Delay in completion of work by EPC contractor

Observations No: 1

Findings

Background :-

EPC Contractor **M/s. Ramky Infra Ltd.** was awarded the contract amounting to INR 7,416 lacs on 30th November 2018 for completion of pending work (as required by concession agreement) within 12 months from the date of which ROW is granted by the authority and **TATA Projects Limited** was appointed as Project Monitoring Consultants to monitor the work carried out by M/s. Ramky Infra Limited and awarded WO amounting to INR 1,349 lacs on 25th March 2019
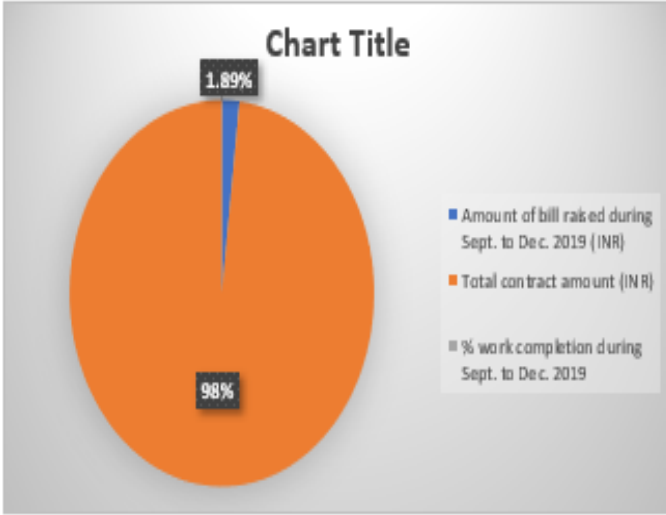
Observation :

- As on Jan-2020, *09 activities are pending* from *M/s. Ramky Infra Ltd* (Refer annex – 1)

- *M/s. Ramky Infra Limited* has completed only **1.89%** of total contract amount in the period of August 2019 to December 2019 (Refer annex – 2)

Amount of bill raised during Aug. to Dec. 2019 (INR)	Total contract amount (INR)	% work completion during Sept. to Dec. 2019
14,032,212	741,164,516	1.89%

- Also, as per contractual agreement of Tata projects, it was mentioned that "in case of delay and early completion of work, PMC timelines will also be adjusted accordingly" whereas, PMC was working at site and raised bills of *INR 36.58 lacs* for the month of November and December despite of non- performance by EPC contractor.

- It was also noted that, PMC contract was extended in the month of January 2020 and leading to additional expense of **INR 12.95 lacs**

Pending Work by Ramky after land Acquisition

- Piduguralla location – MCW work Pending
- Piduguralla (125+282) – ROB work – Work in progress
- Addanki – Street Lightning work not started
- ROW fencing work not started
- Kondrapol (73+500 to 74+700) – RHS service road - WIP
- Bothalapalem (77+370) Service road work not started
- Cherlapally (12+280-13+190) RHS work pending
- Gamalapadu-SR (97+340 - 98+010) – LHS not started
- Dachepally-SR (100+880-101080) – 100m work pending

Annexure 1

Chart Title

1.89%
98%

- Amount of bill raised during Sept. to Dec. 2019 (INR)
- Total contract amount (INR)
- % work completion during Sept. to Dec. 2019

Annexure 2

Observations No: 2

No.	Observation	Recommendation	Management Response
13	**Identification and documentation of delays not carried out at site.**		
	Background There should be a formal process of capturing delayed events at site, its potential impact to the project and the various reasons attributing to it. This will create a healthy document repository. **Observation** Upon review of documentation at site, we noted the following: • No document prepared on delay analysis. • Impact of site hindrances not captured . • Delay to the completion target of July-18 was not prepared as of Dec-18. **Root Cause** No emphasis on documenting and analysis of delays. **Business Impact** • Risk of missing few facts if the events are not captured on regular basis. • Potential risk of rejection of penalties due to non acknowledgement of certain delayed events by the contractor.	• Event Tracker should be maintained for the project based on which delay analysis should be prepared.	**Responsibility :** **Target Date :**

Any Queries

Thank You